

DEPARTMENT: Doylestown Healthcare Partnership	
FACILITY:	
DATE OF ORIGIN: 11/1/2019	NEXT REVIEW DATE: 11/1/2020
AUTHOR (ROLE): ADM Director DHP	
APPROVED BY (ROLE): Network Development / DHP Managing Committee	

PURPOSE:

To provide guidelines for referring patients to specialists.

SCOPE:

This policy applies to all Doylestown Healthcare Partnership Providers who refer patients to other Providers.

POLICY:

All patients who are referred to another Provider should provide a Summary of Care record using CEHRT and exchanged electronically to meet Health Information Exchange.

PROCEDURE:**PCP****Creating and Sending an Outgoing Referral Electronically to another eClinicalWorks Provider**

The outgoing referral can be created from the following areas of eCW:

- A) Patient Appointment
- B) Patient Hub
- C) Treatment Section of the Patients Progress Note.

A) Patient Appointment – Referral on Bottom

Appointment on Saturday, September 09, 2017

Patient* Name ☐ New PT.

Test,Caroline | 29 Jul 1965 |

Appointment

Facility* POS Provider* Resource*

Date* Claim Provider Time*

Ref. Provider Email

Visit

Visit Type* ☐ FC NP (New Patient Office Visit) Reason ...

Visit Status ☐ PEN (Pending) Diagnosis

☐ Transition Of Care

Billing

Open Cases Case Manager

Billing Notes

General Notes

Co-Pay/ Claim changes for this visit only

☐ Change co-pay for this visit

☐ Non-billable visit

Change to Outgoing Referral and Click New

Referrals for Test, Caroline

Patient: Test, Caroline

	Date	Reason	Referral From	Referral To	Specialty	Start Date	End Date	Allow	Used Visits	
<input type="checkbox"/>	07/18/2017	skin check	Peters, Terry		Dermatology	07/18/2017	07/18/2018	0	0	<input type="button" value="Edit"/>
<input type="checkbox"/>	06/09/2017	eval and treat low	Mandel, Elisa		Physical Therapist	06/09/2017	06/09/2018	0	0	<input type="button" value="Edit"/>

B) Patient Hub - Referral

Patient Hub (Test, Caroline)

Test, Caroline (52Y, F) INFO

07/29/1965
Account No: E20255 | Messenger Enabled: No
Web Enabled: Yes

Advanced Directive :
Insurance : Medicare
PCP :
Rendering Pr :

Billing

Patient Balance : \$0.00
Collection Balance : \$0.00
Account Balance : \$170.00
Collection Status :
Assigned to :

Billing Alert
Guarantor Balance
Account Inquiry
Billing Logs

Appointments

Last Appointment : 07/11/2017 10:45 AM
Facility : BIMA:Broderman Inter
Next Appointment :
Facility :
Bumped Appt: NONE Case Manager Hx:
New Appointment

Structured Data

ASCH-Ineligibility Date
PFP HIPAA
PFP PatInfoSheet
PFP Occupation
PVIM CM
PVIM HIPPA
Next Gen Person Number

Progress Notes
Medical Summary
Medical Record
Problem List
eClniForms

Patient Docs
Devices
Consult Notes
Flowsheets
PHM Hub

Action
Logs
Letters
Print Labels
Messenger

New Tel Enc
New Web Enc
Send Message

0 Labs
1 DI
2 Referrals
1 Actions
1 Tel Enc
0 Web Enc
0 Docs
0 P2P

Change to Outgoing Referral and Click New

Referrals for Test, Caroline

Patient: Test, Caroline

incoming outgoing New

Date	Reason	Referral From	Referral To	Specialty	Start Date	End Date	Allow	Used Visits	
07/18/2017	skin check	Peters, Terry		Dermatology	07/18/2017	07/18/2018	0	0	
06/09/2017	eval and treat low	Mandel, Elise		Physical Therapist	06/09/2017	06/09/2018	0	0	

C) Treatment Section of the Patients Progress Note.

The Provider inputs the following options.

- A) To Provider (Picking a Provider with a Green P will allow you to send it electronically to another Providers Jellybean)
- B) Reason of the Referral
- C) Diagnosis (Will populate based on My Setting)
- D) Click OK. (Each Provider has a default dummy user group attached which will assign it to the R Jellybean)

The Referral Coordinator will login as themselves, click on the Outgoing R Jellybean and change the assigned to from their name to the Dummy User Group (*Ref/Auth DHIM User) and will find the referrals that their own practice providers have created. The following items need to be completed before the referral can be sent electronically via P2P or Faxed with Attachments.

- A) Visit Details (**Insurance states how many visits are allowed with the specialist**)
- B) Authorization Code
- C) Consult Pending
- D) Attachments (only if needed – Progress Notes, Labs/DI Reports, Patient Documents)

The screenshot shows the 'New Referral (Outgoing)' form. Key fields are highlighted with red boxes and labeled with letters:

- A:** Points to the 'Visit Allowed' field, which is set to 5.
- B:** Points to the 'Auth Code' field, which contains 'Authorization Code'.
- C:** Points to the 'Status' dropdown menu, which is set to 'Consult Pending'.
- D:** Points to the 'Attachment (1)' button at the bottom of the form.

The form includes sections for 'From' (Provider, Facility), 'To' (Provider, Specialty, Facility), 'Insurance' (Medicare, Pnt Ins), 'Auth Type', 'Auth Code', 'Open Cases', 'Unit Type', 'Assigned To', 'Priority', 'Status', 'Start Date', 'End Date', 'Received Date', 'Referral Date', 'Appt Date', and 'Sub Status'. It also has tabs for 'Diagnosis / Reason', 'Visit Details', 'Notes', and 'Structured Data'.

Once all the above fields are input, the Referral Coordinator clicks the little green arrow button next to "Send Referral" and then select "Send Electronically".

The screenshot shows the 'Reason' and 'Diagnosis' sections of the referral form. A dropdown menu is open next to the 'Send Referral' button, showing the following options:

- Print
- Print with Attachment
- Fax
- Fax with Attachment
- Send Electronically** (highlighted with a red box)

The 'Reason' section shows a description of 'evaluate and treat'. The 'Diagnosis' section shows a code of 'I10' and a name of 'HTN (hypertension), benign'.

(NOTE: If the Provider in the "Referral To" field is not connected to P2P, you will not be able to Send Electronically. You will know that they are P2P connected because when you select that provider, you will see either a **D** or an **P** icon next to their name in the search field. Also, after selecting them, you will see the Green P icon next to their name:

From

Provider

Facility

To

Provider

Specialty

Facility

On the following screen, the system will prompt to send a reminder fax to the other office to let them know there is a P2P message. You can unclick that checkbox then hit "Send" at the bottom.

New Referral (Outgoing)

Referral (Outgoing) • Send Referral Electronically

Send Referral

This referral is ready to be sent electronically.

☒ Send Reminder fax to Alan Abramowitz at

Send Cancel

After it is sent, the status of the outgoing referral can be viewed from the R jellybean:

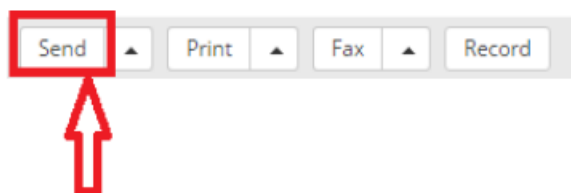
		08/30/2017		Paton, Carla S	Edelson, Mitchell	Gynecologic Oncology	08/30/2017	11/27/2017	08/14/2017	Fountainville Medical Specialists	
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The green checkmark means it sent successfully electronically. A red X will mean it failed transmitting. Any other icon will mean it is currently pending.

HIE Part 1SPECIALISTSending a Consult Note Electronically to another eClinicalWorks Provider **Option 1**

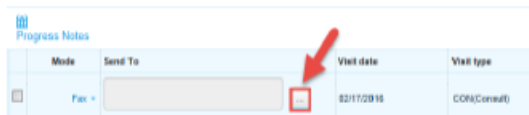
There are two ways to accomplish this, the first way is a quick way to send just the open Progress Note itself to another provider. The second way will let you attach additional Progress Notes/Documents, carbon copy other providers and put in a custom message.



1) To send just the open Progress Note, at the bottom of that Progress Note, click the "Send" button.



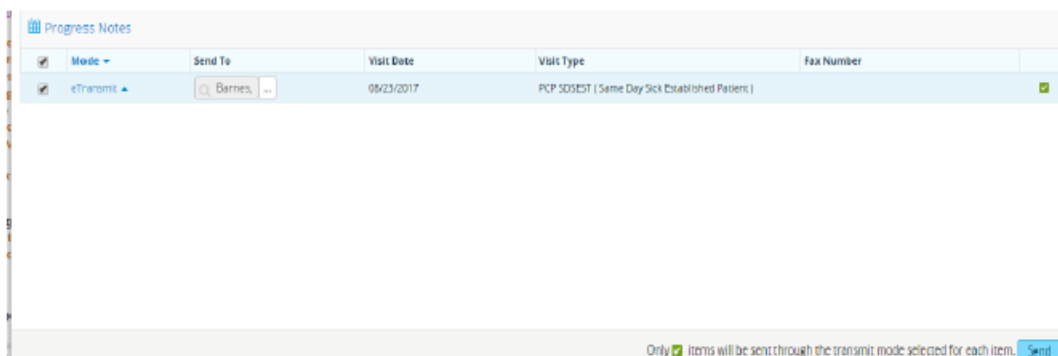
(NOTE: You may get a popup that says "You are not authorized to perform this function". Just click OK on this popup when it pops up – you will still be able to send the note OK.)

Next to where it says "Send To", click the ... button



Search for the provider you wish to send to (last name then a comma then first name) and select the appropriate one from the list by clicking the radio button next to their name. If there are multiple entries for that provider, select the one with either a  or a  next to the name (after verifying the address to be sure it is the correct provider).

Once you have selected the provider, you will see that left side says eTransmit and the right side will display a right checkmark indicating that you can send this successfully.



2) **Option 2:** To send a “P2P Patient Record” (which can consist of progress notes, documents, etc..., write a custom letter), from the patient’s Hub, click the “Share” button with the green P next to it, then “Send eCW P2P Patient Record”.

Patient Hub (Test, CARD A)

Test, CARD A (54Y, M) **INFO**

123 Card Street, 1231212, DOYLESTOWN, PA 19026
 123-456-7891 | 123-456-7891 | 123-456-7891
 jchrisssand@dh.org | 94/02/1963
 Account No: E20252 | Messenger Enabled
 Web Enabled: Yes | MHN: 402571

Structured Data

ASCH-Intelligibility
 Date
 PPP HIPAA
 PPP PatientSheet
 PPP Occupation
 PVM CM
 PVM HIPAA
 Next Gen Person Number

Progress Notes **@Patient Docs** **Action** **New Tel Enc**
Medical Summary **Devices** **Logs** **New Web Enc**
Medical Record **Consult Notes** **Letters** **Send Message**
Problem List **Flowcharts** **Print Labels** **Messenger**
eClnForms **PIM Hub**

Global Alerts

Advance Directive

Problem List

110 HTN (hyperte...
 G35 Multiple scler...
 G40.309 Nonintractabl...
 I74.01 Saddle embol...
 I71.4 Abdominal ao...
 I15.1 Hypertension ...
 G91.2 (Idiopathic) no...
 O04.89 (Induced) term...
 I48.1 Persistent atr...
 I27.2 Mixed hyperk...
 E11.22 Type 2 diabet...
 I48.0 Paroxysmal at...
 I48.2 Chronic atrial ...
 I29.5 Acquired abse...
 I48.3 Typical atrial fl...
 I78.2 Mixed hyperk...

Send P2P Patient Record

From: AAPProvider, Provider **1.**

To: Abramowitz, Alan **2.**

Reason: Reason for patient record **3.**

Patient: Test, CARD A **4.**

Attach Medical Summary
Attach CCR/CCD

Progress Notes (1) **5.**

PREVIEW DATE **REASON**

08/23/2017

Lab Reports (0) **6.**

PREVIEW NAME **REASON** **RESULT**

X-Rays (0) **7.**

PREVIEW NAME **REASON** **RESULT**

Patient Documents (0) **8.**

Send **9.**

- 1) In the "From" field, indicate using the checkboxes which provider the message should come from. This will only appear for staff that are approved to send on behalf of the provider.

Select Provider

☒ McWilliams, Sean

OK Cancel

- 2) In the "To" field, indicate which outside provider this record should go to.

P2P Provider Selection

Favorites All

Lastname, Firstname Specialty City Zipcode

	Provider Name	Specialty	Address	Contact Details
<input checked="" type="radio"/>	Abramowitz, Alan	Internal Medicine	5039 Swamp Road, Po Box 417, Fountainville, PA-19823	(215) 230 6360 (215) 230 6370

☐ In address Book ☐ Not in address Book (PA)

OK

Note that if the radio button at the top is clicked to "All", it will show you all providers in your state who are on P2P, regardless if they are in your personal address book.

To select a referring provider, after searching, click the little radio button next to that referring doctor's picture and name, then OK at the same time.

P2P Provider Selection

Favorites All

ti Specialty City Zipcode

	Provider Name	Specialty	Address	Contact Details
<input checked="" type="radio"/>	Abramowitz, Alan	Internal Medicine	5039 Swamp Road, Po Box 417, Fountainville, PA-19823	(215) 230 6360 (215) 230 6370
<input checked="" type="radio"/>	A. Rahman, Sharan	Gynecology, Obstetrics & Gynecology	1016 Chestnut St, Suite 907, Phila., PA-19107	(267) 979 8400 (267) 979 8400
<input type="radio"/>	AARON, MARK	Physical Therapist	1145 BOWER HILL RD, PITTSBURGH, PA-15243	(412) 276 6637 (412) 276 2205
<input type="radio"/>	Aaronson, Alexis	Pulmonary Disease, Internal Medicine	50 N 12th Street, Lemoyne, PA-17043	717-234-2581 717-236-1121
<input type="radio"/>	AARONSON, GARY	Pulmonary Disease, Internal Medicine	3668 RED LION ROAD, SUITE 250, PHILADELPHIA, PA-19114	(215) 812 8500 (215) 812 2883
<input type="radio"/>	Abai, Babak	Surgery	1245 Highland Avenue, Suite 600, Abington, PA-19001	(215) 867 3690 (215) 867 1140
<input type="radio"/>	Abbas, Hassan	General Practice	1200 Old York Rd, Abington, PA-19001	
<input type="radio"/>	Abboud, Joseph	Adult Reconstructive Orthopaedic Surgery, Orthopaedic Surgery	925 Chestnut Street, 5TH FLOOR, Philadelphia, PA-19107	(267) 339 3500 (215) 503 0580
<input type="radio"/>	Abboudi, Jack	Orthopaedic Surgery	925 Chestnut Street, Philadelphia, PA-19107	(610) 527 2727 (215) 503 0580

- 3) The Reason field can be used to give a brief description of what is to be sent (such as in an email)
- 4) The Message field can be used to send a personalized message to the other provider that will accompany any documentation.
- 5) The Attachments button can be used to attach Progress Notes and Documents to the message that will go to the other provider.

☒ Attach Medical Summary
☒ Attach CCR/CCD

Progress Notes (1) +

PREVIEW DATE	REASON
08/23/2017	

Lab Reports (0) +

PREVIEW NAME	REASON	RESULT
--------------	--------	--------

X-Rays (0) +

PREVIEW NAME	REASON	RESULT
--------------	--------	--------

Patient Documents (0) +

NAME	DESCRIPTION
------	-------------

[Send](#)

Next to Progress Notes, click the “Attach/Plus Sign” button. Check off any Progress Notes you wish to attach and click “OK”. You can do the same for Patient Documents.

- 6) Finally, click the “Send” button at the bottom.

To view the status after one of these records has been sent, click on the letter T next to the T jellybean and select “eCW P2P Patient Records”.

- Telephone Encounter 3
- Web Encounter 2
- Accounts 0
- Dashboard 0
- Action 0
- P P2P Patient Records 0
- eCW Clinical Notification
- New Telephone Encounter
- New Action
- P Send P2P Patient Record
- P Send P2P Referral/Consult

P2P Patient Records							
From Provider		All		Filter		Inbox Outbox	
DATE	PATIENT NAME	PHONE	TO PROVIDER	CC PROVIDERS	REASON	FROM PROVIDER	STATUS
09/29/2017		215-343-1504	Ryan, Carolyn		Consult Notes	Mooradd, Michael G	✓
09/29/2017		123-456-7891	Abrahamowitz, Alan			AAProvider/Provider	NA
09/29/2017		215-489-9592	Banner, Bruce		Consult Notes	Williamson, Mary Ann	✗
09/29/2017		215-835-8615	Mandel, Elisa		Consult Notes	Mooradd, Michael G	✓
09/29/2017		215-794-8104	Taffin, Dennis		Consult Notes	Sengtrigoli, Renee	✓
09/29/2017		215-290-3188	Shueffer, Joseph		Consult Notes	Gejer, Eric	✓
09/28/2017		215-622-1850	Bugrick, Joseph		Consult Notes	Williamson, Mary Ann	✓
09/28/2017		215-345-9240	Taylor, Melissa		Consult Notes	Williamson, Mary Ann	✓
09/28/2017		215-536-0531	Minissale, Joseph		Consult Notes	Williamson, Mary Ann	✓
09/28/2017		215-536-0531	Kondan, Richard		Consult Notes	Williamson, Mary Ann	✓

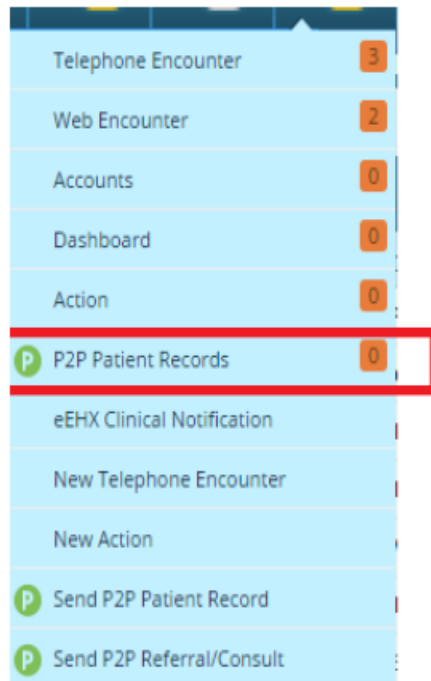
Selecting "Outbox" and changing the "From Provider" to your provider will show you all of the Records sent in this way electronically via P2P. At the far right you will see an area that says "Status".

FROM PROVIDER	STATUS
Mooradd, Michael G	✓

If the status is a green checkmark, it sent successfully electronically. If it is a red X, it did not go electronically. If the icon looks like a grey arrow, it is still in the process of sending. (This process can take a few minutes).

Both PCP and SPECIALTY**Receiving a Patient Record Electronically from another eClinicalWorks Provider**

If you've received a Patient Record from another provider electronically, it will add to the T jellybean count. However, to access the list of records you've received, click the letter T next to the T Jelly bean and select "eCW P2P Patient Records".



This will show the list of P2P Patient Records assigned to you.

P2P Patient Records

Assigned To

🔍 All

✕

🌟

🔖

Open

Addressed

All

All Open (All Dates)

Filter

Deliver

Inbox

Outbox

RE			DATE	PATIENT NAME	PHONE	FROM	TO	REASON	ASSIGNED TO
2	🟢	🔗	07/10/2017 11:40 AM		215-941-7357	Reinach, Alan J	Peter A Shaftei, MD		Shaftei, Peter A
2	🟢	🔗	07/10/2017 11:10 AM		608-406-1723	Frankel, Arthur	Martynec, Bohdan		Martynec, Bohdan
2	🟢	🔗	07/06/2017 4:28 PM		709-597-3257	Leung, Patricia	Richard S Mandel, DO	thanks	Mandel, Richard S
2	🟢	🔗	07/06/2017 11:02 AM		709-597-3257	Leung, Patricia	Richard S Mandel, DO	thanks	Mandel, Richard S
2	🟢	🔗	07/06/2017 10:02 AM		215-343-6027	Goldstein, Richard	Toltzis, Melanie H	Records	Toltzis, Melanie H
2	🟢	🔗	07/05/2017 4:16 PM		215-674-1188	Nussbaum, Michael	Mandel, Eliza B		Mandel, Eliza B
2	🟢	🔗	06/30/2017 4:18 PM		215-672-7795	Nussbaum, Michael	Mandel, Eliza B		Mandel, Eliza B
2	🟢	🔗	06/29/2017 11:38 AM		215-969-4449	Krettek, Janet M	Richard S Mandel, DO		Richard S Mandel, DO
2	🟢	🔗	06/29/2017 10:48 AM		215-870-3526	Krettek, Janet M	Richard S Mandel, DO		Richard S Mandel, DO
2	🟢	🔗	06/26/2017 12:48 PM		215-801-6000	Mallanarapu, Varahi	Banner, Randi	records	Banner, Randi
2	🟢	🔗	06/22/2017 4:28 PM	215-870-3526	Krettek, Janet M	Richard S Mandel, DO		Richard S Mandel, DO	
2	🟢	🔗	06/22/2017 11:16 AM	609-406-1723	Frankel, Arthur	Martynec, Bohdan		Martynec, Bohdan	

To access a record, just left click on the patient's name

P2P Patient Record

Status ☒ Open ☐ Addressed

Patient:

Reason: Reinach, Alan J
To: Peter A. Shaftei, MD

Date: 07/10/2017 11:40 AM
Assigned To: Shaftei, Peter

Attachments (3) OK Cancel

The first thing you want to do is click the “Match Patient” button as in the above steps, to link up the patient in your eCW. The patient will appear in **red**.

If there are any attachments attached to this record, you can click the “Attachments” button in the bottom right of this window to view them.

Next change the status from “Open” to “Addressed” and click “OK” at the bottom.

It will then prompt to move the documents to the patient’s chart. If you select “Yes”, it will save them to “eCW P2P Documents” in the Patient Documents.

Appointment – Transition of Care

Once matched, you will need to attach the CCDA document received with the P2P record to the transitioning appointment.

- 1) When checking in, open the appointment and click on the Transition of Care button

Appointment on Wednesday, May 08, 2019

Patient: Pool Test, Dead | 01 Jul 1951 | tical2174@hotmail.com | eHX Status

Appointment

Facility: Doylestown Health | POS: 11 | Provider: AAProvider, Provider | Resource: AAProvider, Provider A

Date: 05/08/2019 | Claim Provider | Ref. Provider Email: tical2174@hotmail.com

Time: 11:30 am | 11:45 am

Visit

Visit Type: CTS F/U (Follow Up) | Reason: Test Win 10

Visit Status: ARR (Check-In) | Diagnosis: Transition Of Care

Billing

Open Cases | Case Manager | Add Billing Data

Billing Notes | General Notes

- 2) If the electronic summary (CCDA) was received click the Transition of Care – Electronic Summary of care record received. If it was not, select the second option for Electronic Summary of care record NOT received. The Transition of Care – Electronic summary of care record NOT received will be excluded from the measure.
- 3) If the CCDA was received electronically, Select the corresponding P2P record from the bottom list (P2P Patient Records) then click OK

Incoming Referrals/Patient Records

Patient: Pool Test, Dead

☒ Transition of Care - Electronic summary of care record received

☐ Transition of Care - Electronic summary of care record NOT received

Referrals

Date	Reason	Referral From	Referral To	AssignedTo	Speciality	Start Date	End Date
12/27/2017	Heart murmur	AAProvider, Provider	Reinhardt, Sean			12/27/2017	12/27/2018
11/16/2017	tummy ache	AAProvider, Provider	Alan Chang			11/16/2017	11/16/2018

P2P Patient Records

Date	Reason	From	To	AssignedTo
05/11/2018	Sending a test	Hale, Robert	Jeffrey Danzlis	Danzlis, Jeffrey
12/29/2017	Patient is in check	Hale, Robert	Provider A AAProvider	Green, Cal

There will be a green check box by the Transition of Care if this was done successfully.

✓ Transition Of Care

Importing CCDA Data into Patient Chart (Hospital Discharges)

A provider can now choose whether to import the entire contents or any individual item(s) from the CCDA document corresponding to the referral. CCDA documents are found in the DRTLA tab on the right chart panel of the progress note.

- 1) Click on the DRTLA tab on the Right Chart Panel.
- 2) Scroll to the bottom until you see the ECW P2P Patient Records
- 3) Click the CCR link to import selected items shared on the CCDA or the gray paperclip to view the document.
- 4) Click the blue arrows to select an individual item or an entire category

In order to receive credit, you MUST verify Current Medications, Allergies, and Problem List, whether you import through the CCDA or do it manually.

***** PI measure*****

For problem list the PL Verified button on the Overview tab should be green. If it is Red, you can click on the red icon and verify the problem list this way. This also can be done through the assessment screen. If there are no known problem list, Open problem list screen and click check box for K.N.P.

Reviewed:

Revised: