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:

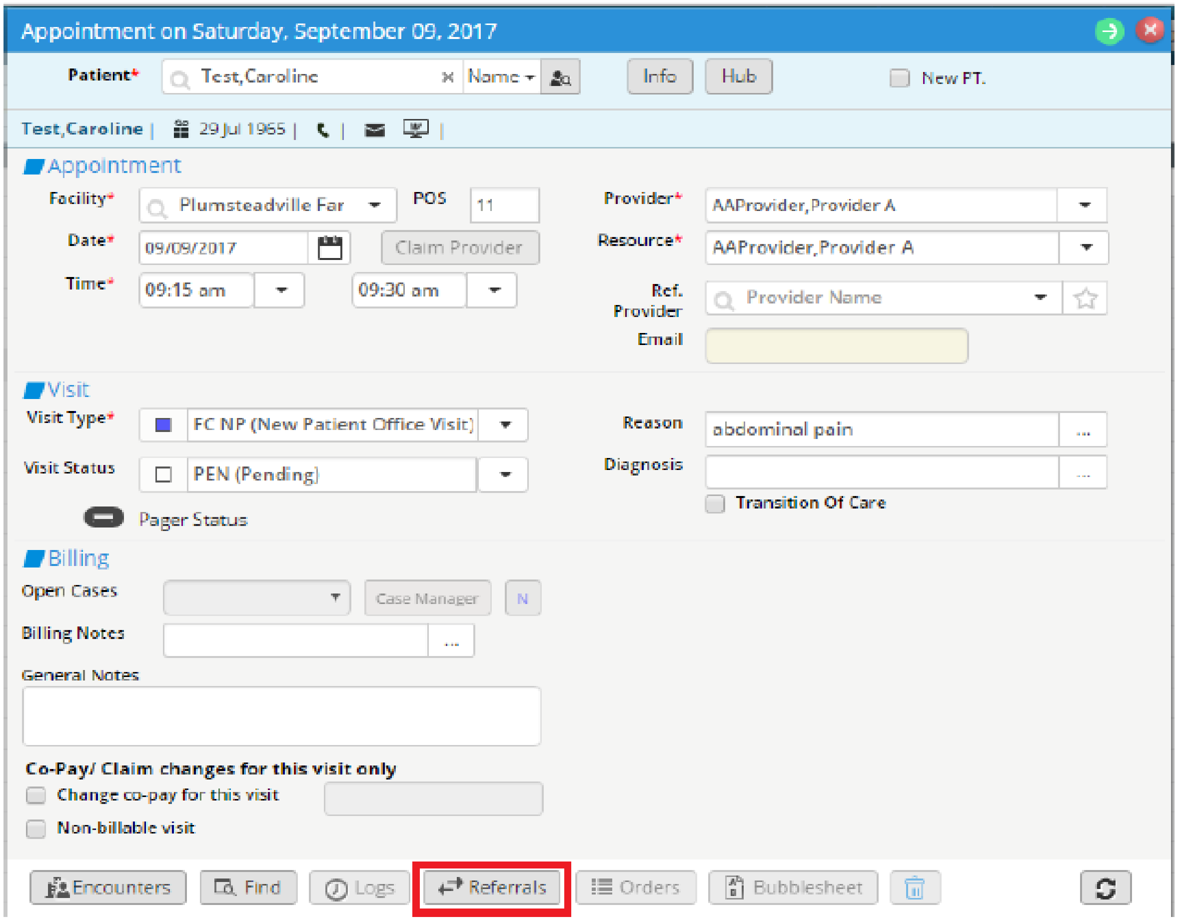
PCP

Creating and Sending an Outgoing Referral Electronically to another eClinicalWorks Provider

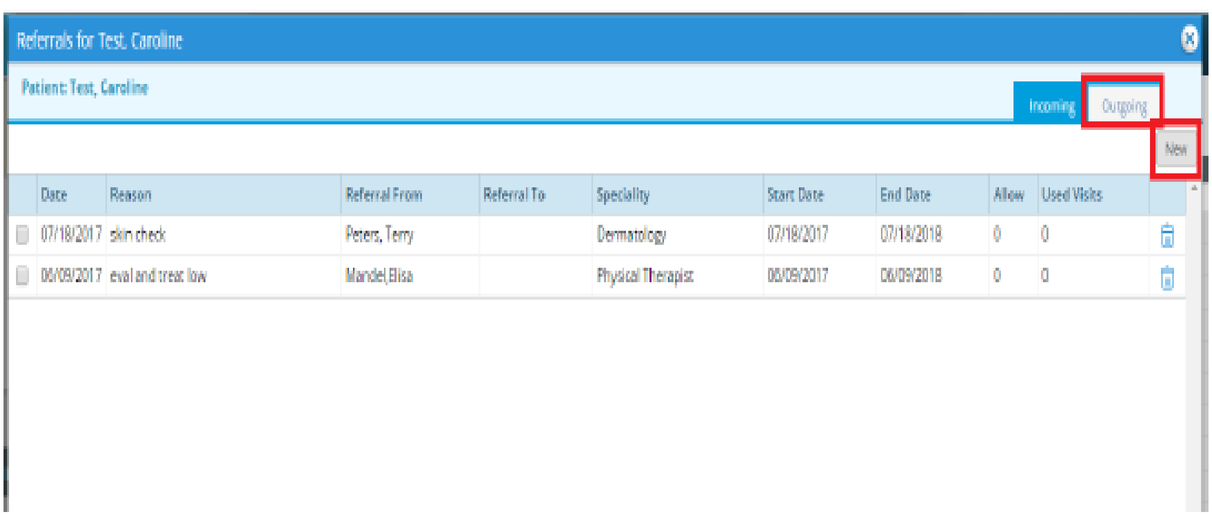
The outgoing referral can be created from the following areas of eCW:

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

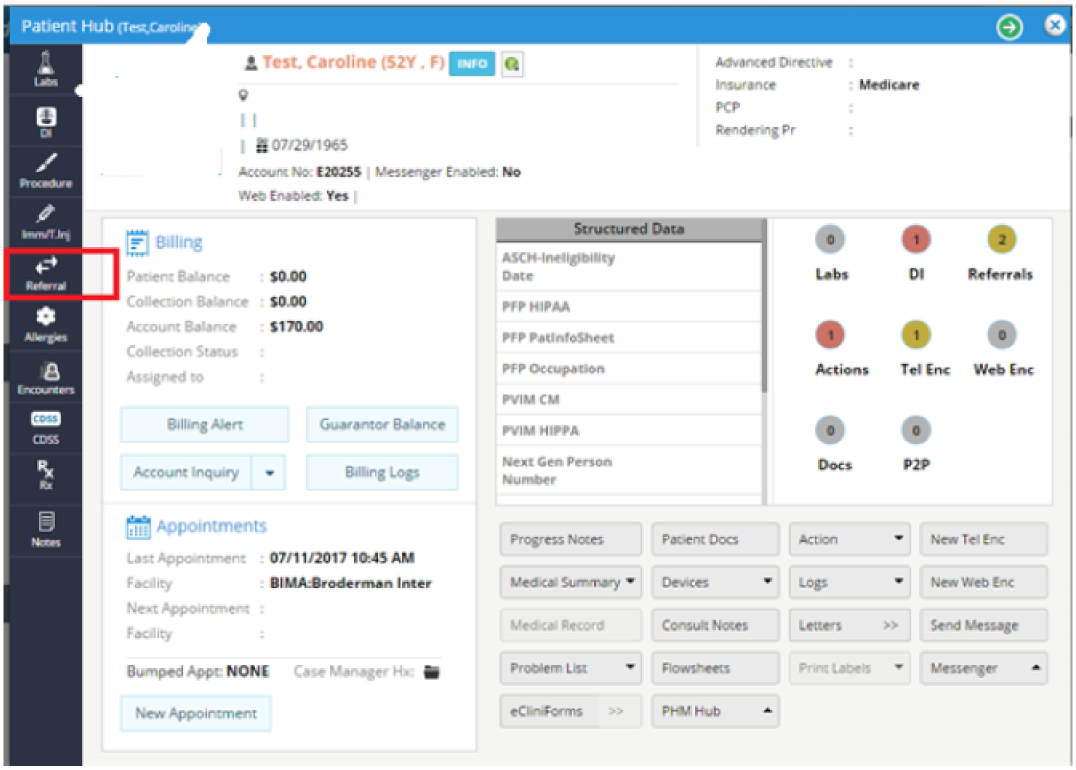
A) Patient Appointment – Referral on Bottom



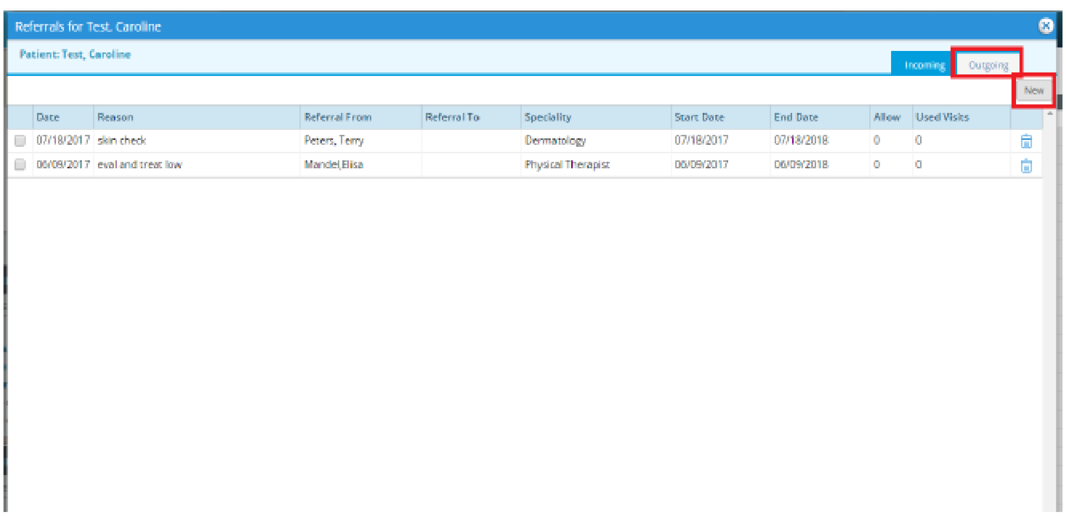
Change to Outgoing Referral and Click New



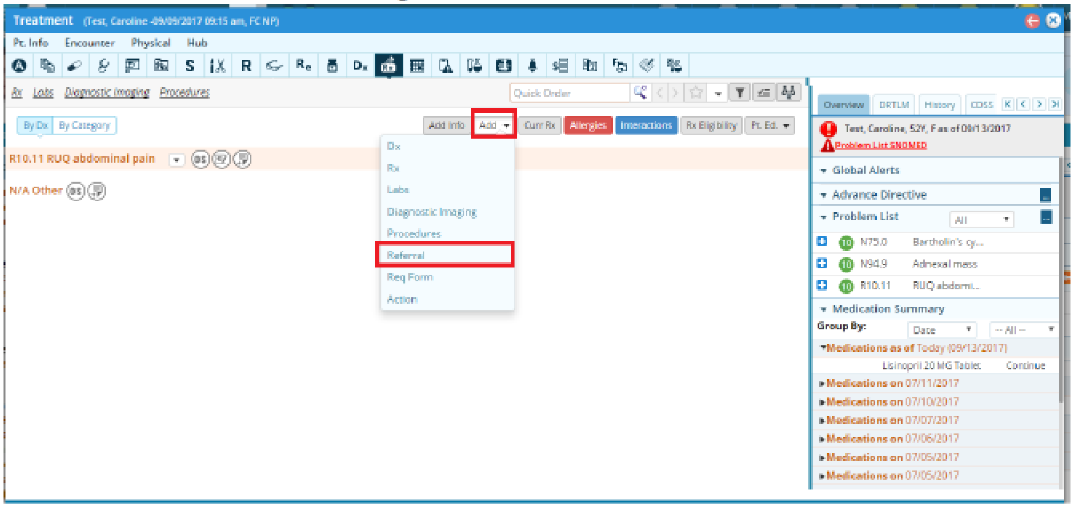
B) Patient Hub - Referral



Change to Outgoing Referral and Click New

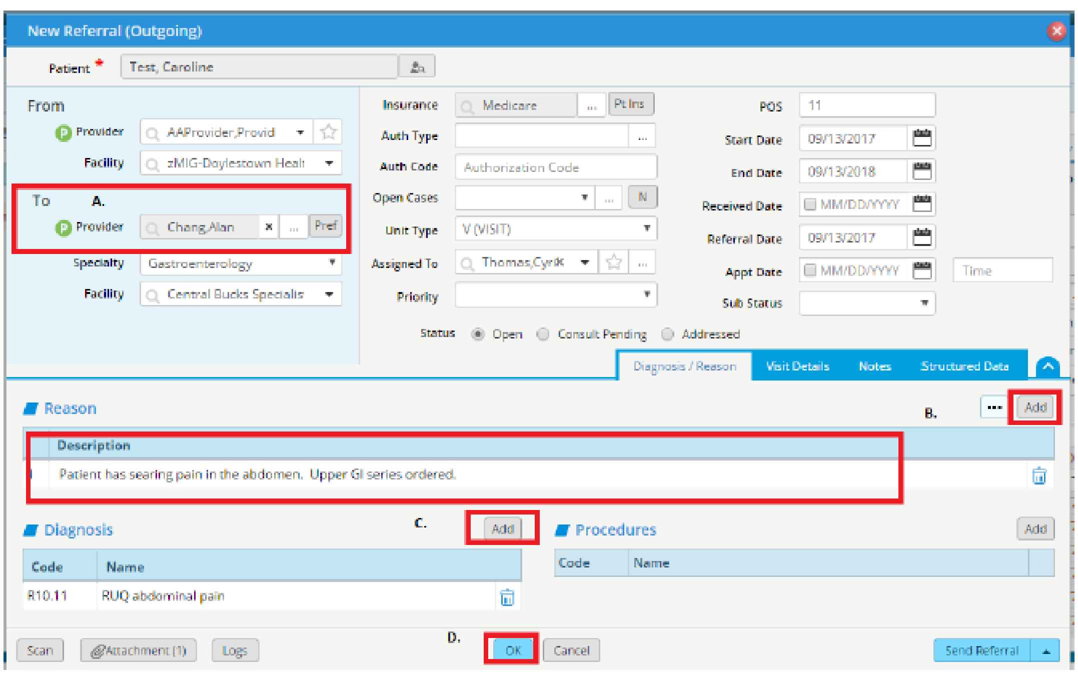


C) Treatment Section of the Patients Progress Note.



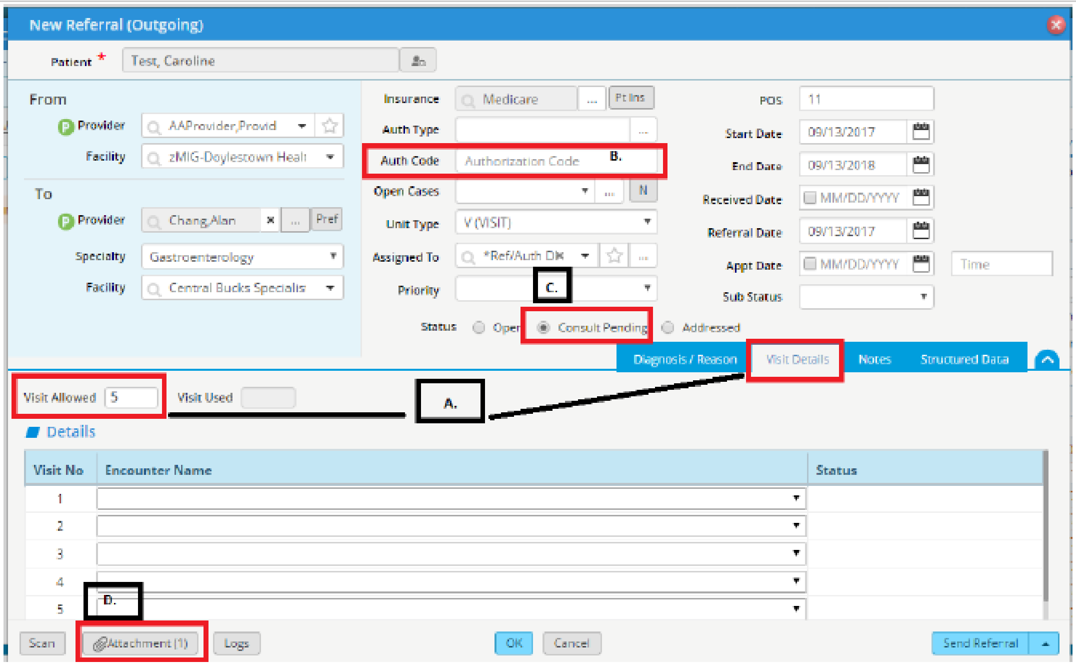
The Provider inputs the following options.

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)**

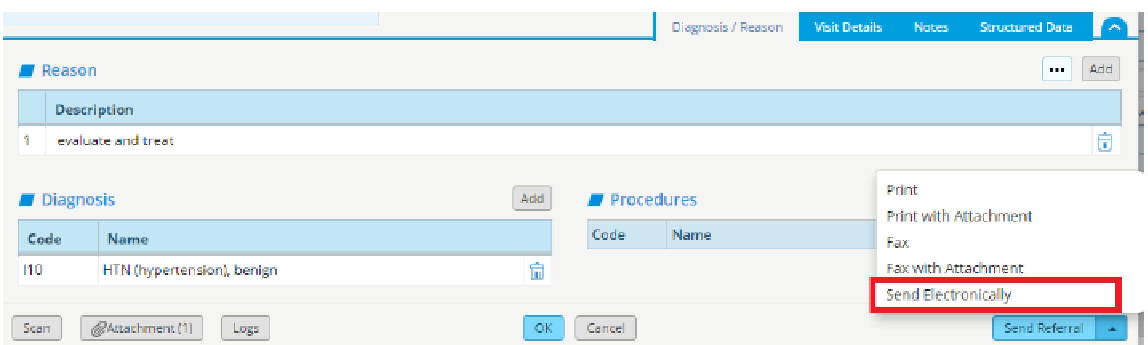


The Referral Coordinator will login as themselves, click on the Outgoing R Jellybean and change the assigned to from their name to the Dummy User Group (*Ref/Auth DHIM User) and will find the referrals that their own practice providers have created. The following items need to be completed before the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

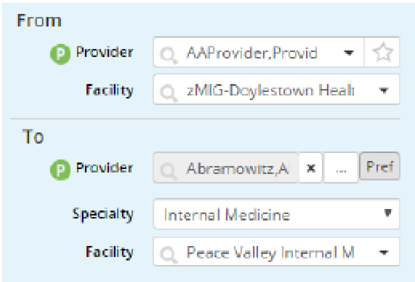
A) Visit Details **(Insurance states how many visits are allowed with the specialist)**
B) Authorization Code
C) Consult Pending
D) Attachments (only if needed – Progress Notes, Labs/DI Reports, Patient Documents)



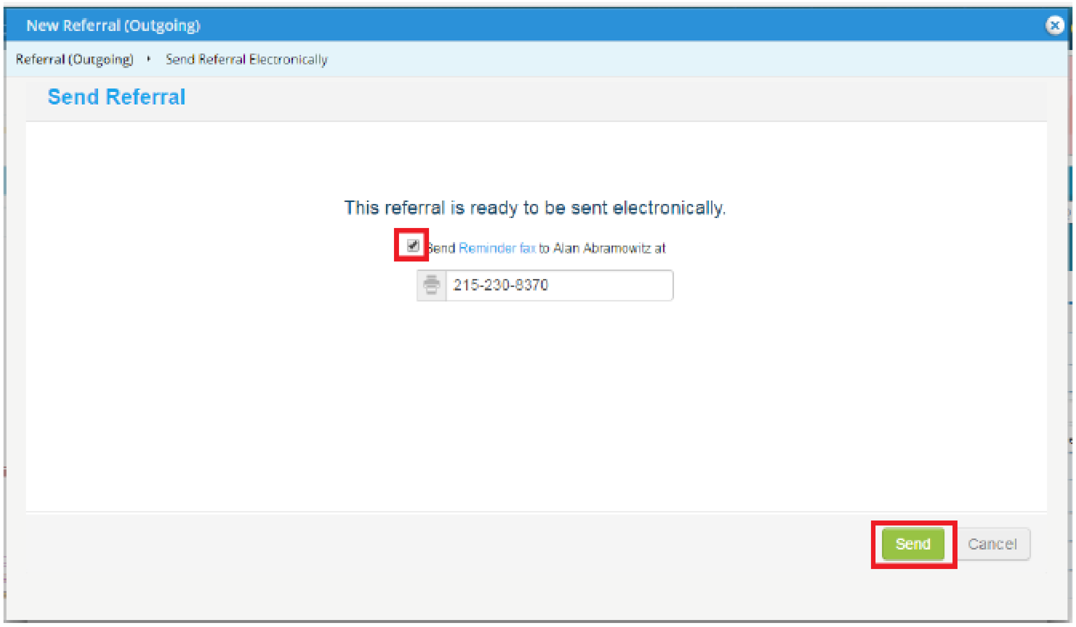
Once all the above fields are input, the Referral Coordinator clicks the little green arrow button next to "Send Referral" and then select "Send Electronically".



(**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:



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.



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

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.

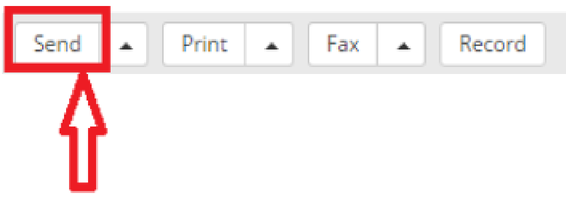
<u>HIE Part 1</u>

<u>SPECIALIST</u>

<u>Sending a Consult Note Electronically to another eClinicalWorks Provider (Option 1)</u>

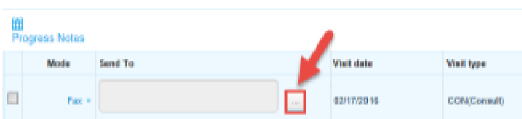
There are two ways to accomplish this, the first way is a quick way to send just the open Progress Note itself to another provider. The second way will let you attach additional Progress Notes/Documents, carbon copy other providers and put in a custom message.

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



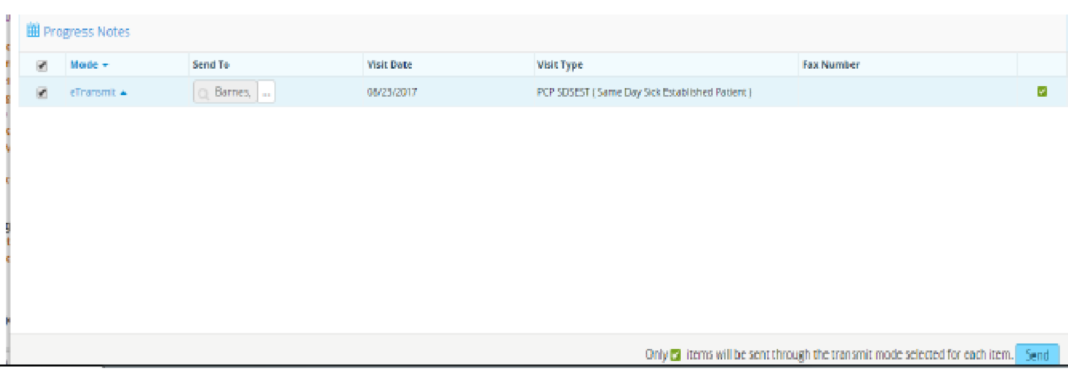
(NOTE: You may get a popup that says "You are not authorized to perform this function". Just click OK on this popup when it pops up – you will still be able to send the note OK.)

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

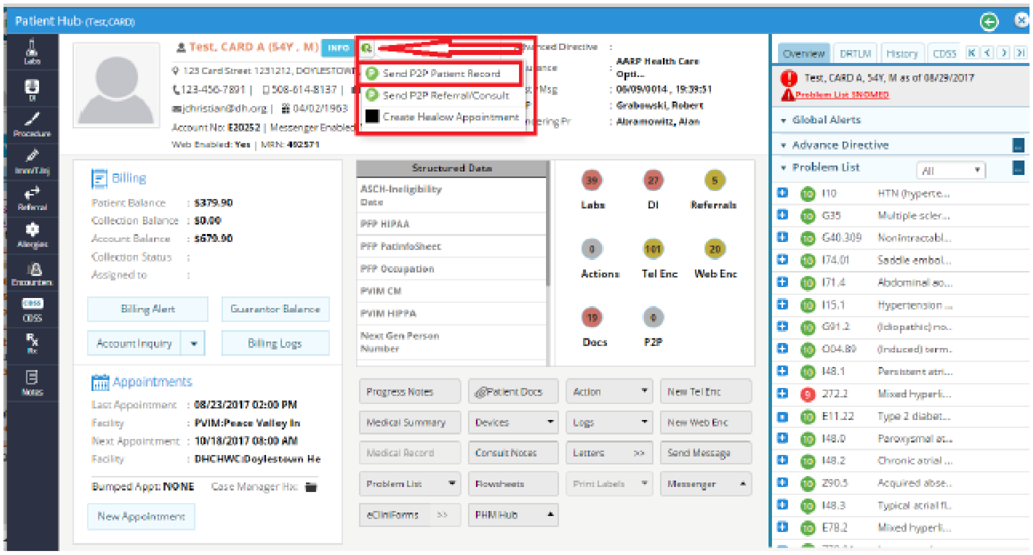


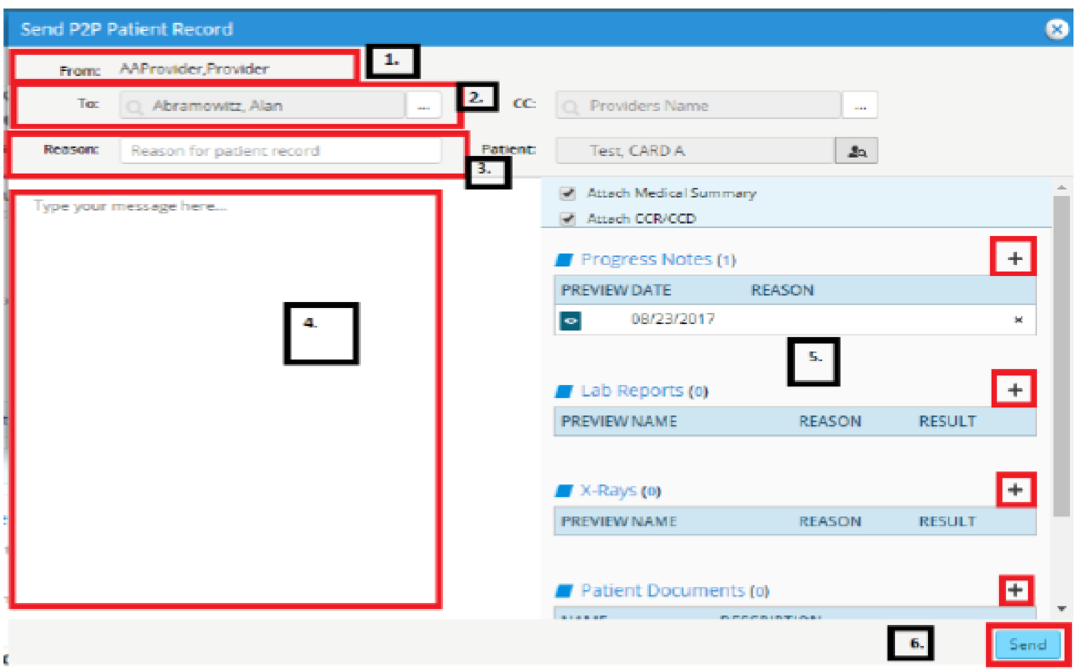
Search for the provider you wish to send to (last name then a comma then first name) and select the appropriate one from the list by clicking the radio button next to their name. If there are multiple entries for that provider, select the one with either a  or a  next to the name (after verifying the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

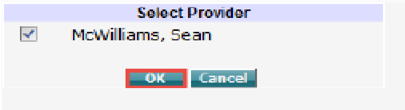


2) **Option 2.** To send a "P2P Patient Record" (which can consist of progress notes, documents, etc…, write a custom letter), from the patient's Hub, click the "Share" button with the green P next to it, then "Send eCW P2P Patient Record".

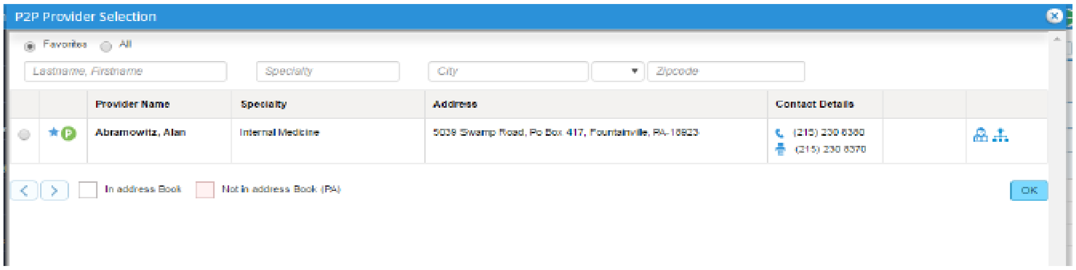




1) In the “From” field, indicate using the checkboxes which provider the message should come from. This will only appear for staff that are approved to send on behalf of the provider.

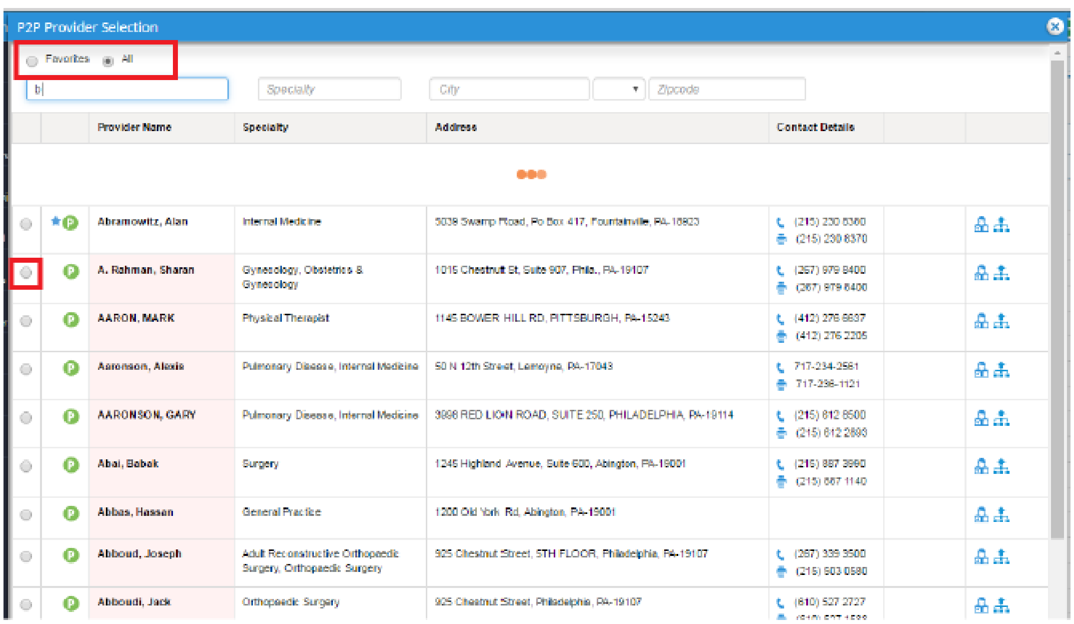


2) In the “To” field, indicate which outside provider this record should go to.

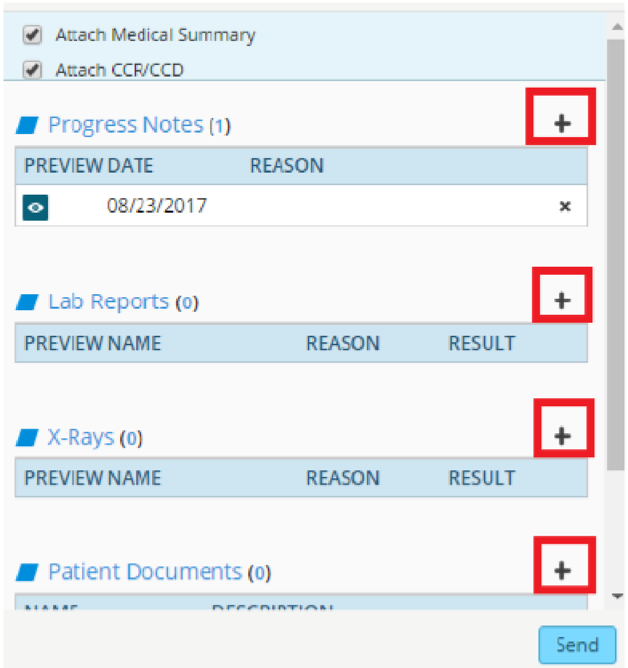


Note that if the radio button at the top is clicked to “All”, it will show you all providers in your state who are on P2P, regardless if they are in your personal address book.

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.



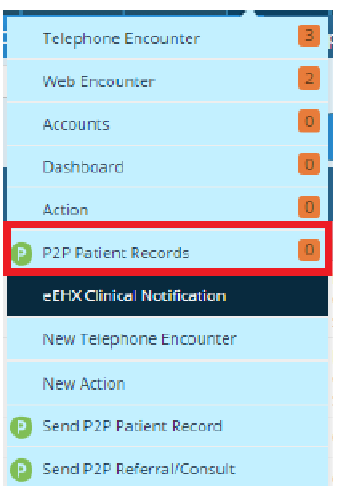
3) The Reason field can be used to give a brief description of what is to be sent (such as in an email)
4) The Message field can be used to send a personalized message to the other provider that will accompany any documentation.
5) The Attachments button can be used to attach Progress Notes and Documents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

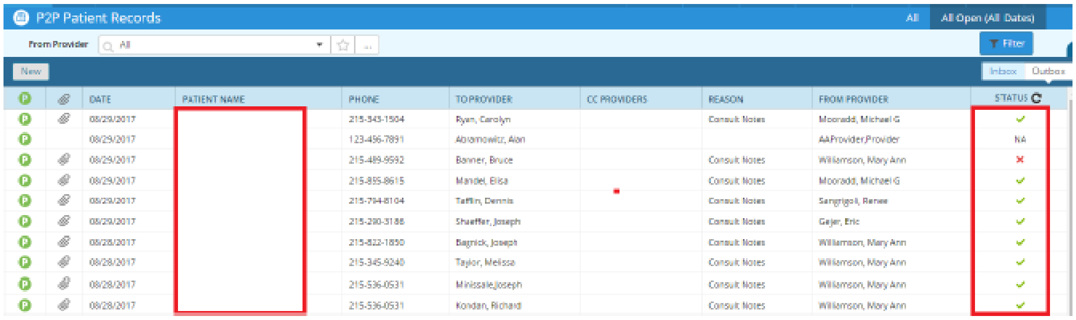


Next to Progress Notes, click the "Attach/Plus Sign" button. Check off any Progress Notes you wish to attach and click "OK". You can do the same for Patient Documents.

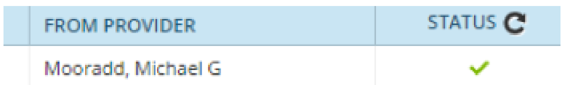
6) Finally, click the "Send" button at the bottom.

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".





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”.

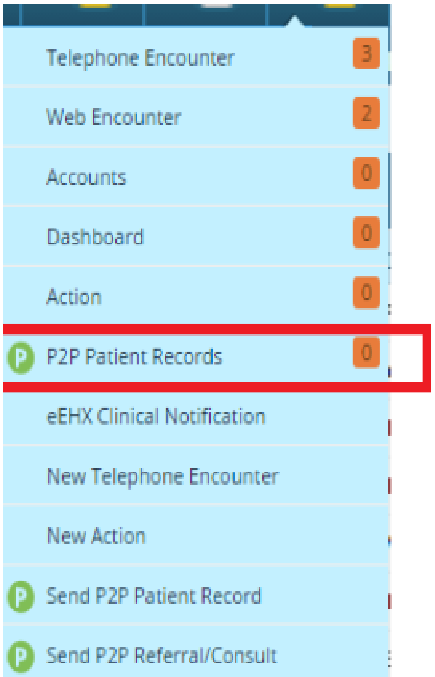


If the status is a green checkmark, it sent successfully electronically. If it is a red X, it did not go electronically. If the icon looks like a grey arrow, it is still in the process of sending. (This process can take a few minutes).

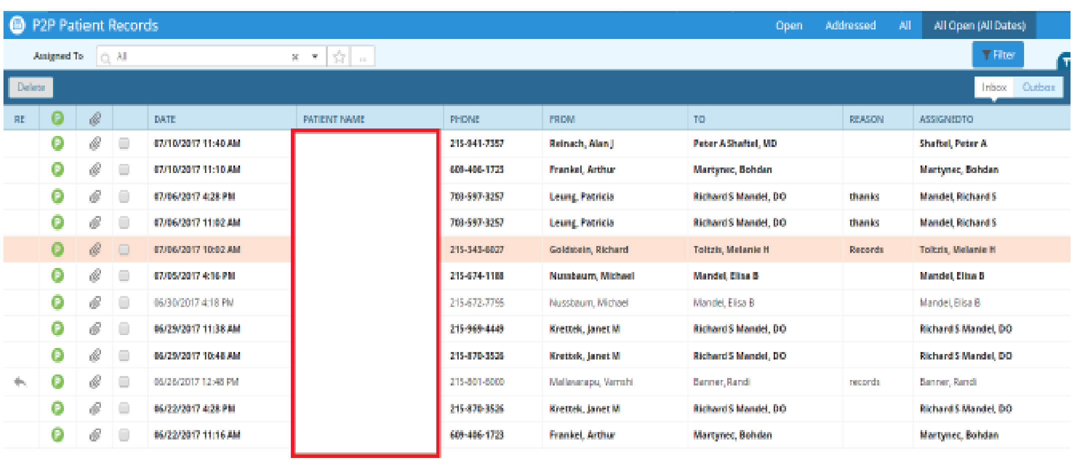
Both PCP and SPECIALTY

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".

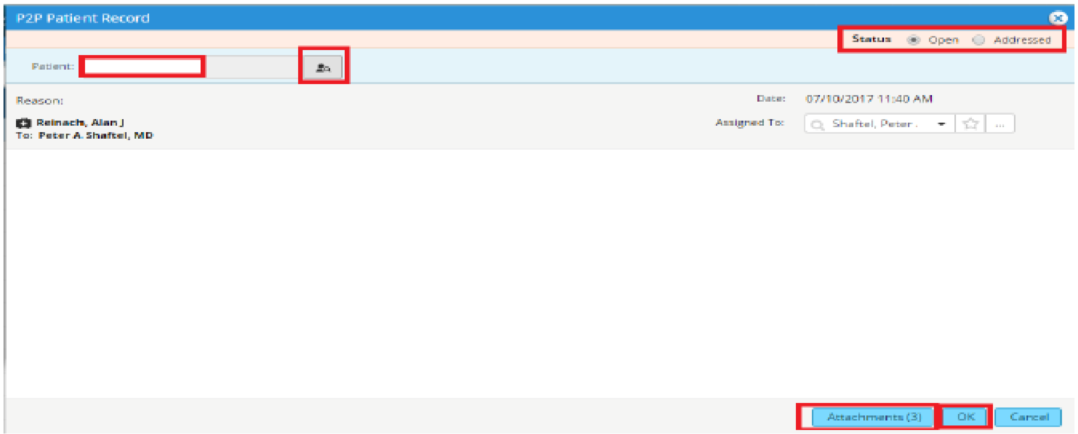


This will show the list of P2P Patient Records assigned to you.



RE	DATE	PATIENT NAME	PHONE	FROM	TO	REASON	ASSIGNEDTO
	07/10/2017 11:40 AM		215-941-7357	Reinach, Alan J	Peter A Shaftel, MD		Shaftel, Peter A
	07/10/2017 11:10 AM		609-406-1723	Frankel, Arthur	Martynec, Bohdan		Martynec, Bohdan
	07/06/2017 4:28 PM		703-597-3257	Leung, Patricia	Richard S Mandel, DO	thanks	Mandel, Richard S
	07/06/2017 11:02 AM		703-597-3257	Leung, Patricia	Richard S Mandel, DO	thanks	Mandel, Richard S
	07/06/2017 10:02 AM		215-343-6027	Goldstein, Richard	Toltzis, Melanie H	Records	Toltzis, Melanie H
	07/05/2017 4:16 PM		215-674-1188	Nussbaum, Michael	Mandel, Elisa B		Mandel, Elisa B
	06/30/2017 4:18 PM		215-672-7795	Nussbaum, Michael	Mandel, Elisa B		Mandel, Elisa B
	06/29/2017 11:38 AM		215-969-4449	Krettek, Janet M	Richard S Mandel, DO		Richard S Mandel, DO
	06/29/2017 10:48 AM		215-870-3526	Krettek, Janet M	Richard S Mandel, DO		Richard S Mandel, DO
	06/26/2017 12:48 PM		215-801-6000	Mallavarapu, Vamshi	Banner, Randi	records	Banner, Randi
	06/22/2017 4:28 PM		215-870-3526	Krettek, Janet M	Richard S Mandel, DO		Richard S Mandel, DO
	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



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.

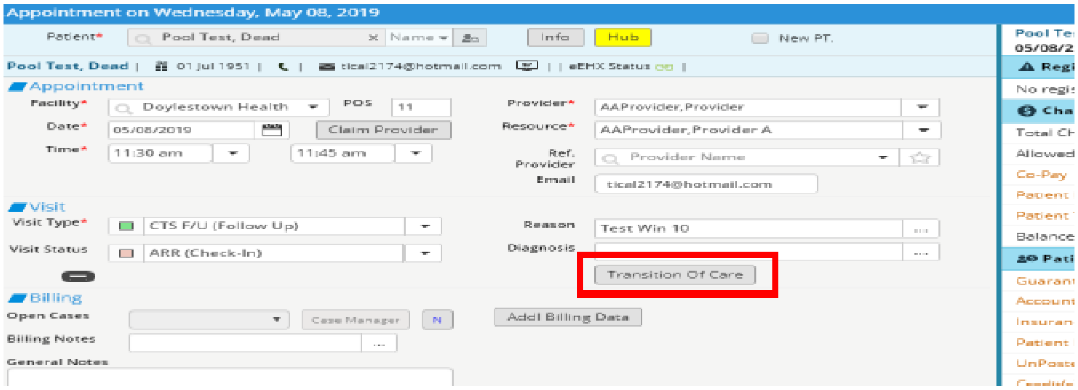
Next change the status from "Open" to "Addressed" and click "OK" at the bottom.

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.

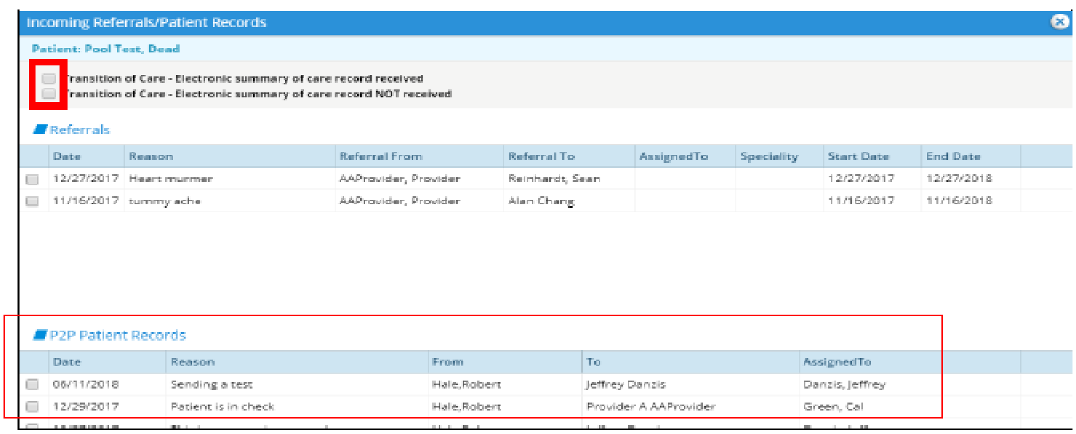
Appointment – Transition of Care

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

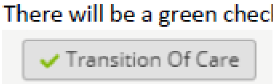
1) When checking in, open the appointment and click on the Transition of Care button



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 – Electronica 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



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



Importing CCDA Data into Patient Chart (Hospital Discharges)

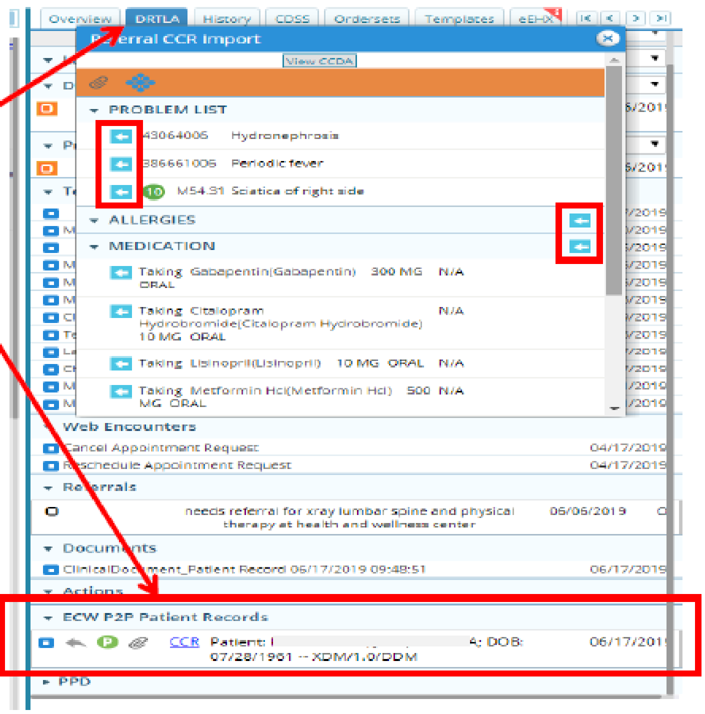
A provider can now choose whether to import the entire contents or any individual item(s) from the CCDA document corresponding to the referral. CCDA documents are found in the DRTLA tab on the right chart panel of the progress note.

1) Click on the DTRLA 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.

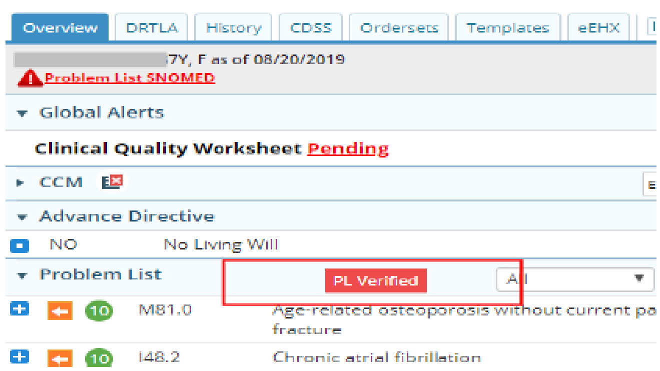
4) Click the blue arrows to select an individual item or an entire category



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: