

# Sending Referrals in ECW 11

**Pcare, Fifteen**  
 277 Pleasant Street  
 Fall River, MA-02721  
 DOB: 01/12/1952  
 Age: 67 Y Sex: F  
 Advance Directive:  
 WebEnabled: Yes  
 Messenger Enabled: Yes  
 Last vMsg: 08/12/2019 1901-01-01  
 Account No: 403672

Home:  
 Work:  
 Cell:  
 Email: [twhrq@aol.com](mailto:twhrq@aol.com)  
 Insurance: Medicare Mass Part B  
 PCP: Philip, Linsey  
 Rendering Pr:  
 Default Facility:

Patient Balance: \$0.00 Collection Status:  
 Account Balance: \$0.00 Assigned To:  
 Coll. Balance: \$0.00

Last Appt: 08/19/2019 09:00 AM Facility: KY:Prima CARE Kney  
 Next Appt: Facility:  
 Bumped Appts: NONE Case Manager Hx:

Buttons: New Appt, New Tel Enc, Print Label(s), Billing Alert, Letters, Encounters, Medical Summary, Rx

Dropdown Menu (Referrals):  
 Create eCW P2P Appointment  
 Send eCW P2P Patient Record  
 Send eCW P2P Referral/Consult

Opening a new outgoing referral from a PCP to a specialist can be done either from the Hub or from the treatment section of a progress note or virtual visit.

Rx: Cur Rx + Add - Remove Education Formulary Pop Up  
 Headache, chronic da Others  
 Commer Name Strength Formula Take Route Frequency Duration Dispe  
 Labs Browse ... Diagnostic Imaging Browse ... Procedure  
 Notes Clinical Notes Browse ... Spell chk Cr Outgoing Referral eClinIS

Referral (Outgoing)  
 Patient: Pcare, Fifteen (403672) Sel Info Hub  
 Insurance: Medicare Mass Part B Sel Pt Ins POS 11  
 Ref From: Kney, Bradford ... Ref To: Provider: ... Pref Clear  
 Facility From: Prima CARE Kney ... Specialty:  
 Auth Code: Facility To: ... Clear  
 Start Date: 08/19/2019 Auth Type: ...  
 Referral Date: 08/19/2019 End Date: 08/19/2020  
 Open Cases: ... Assigned To: Claudia, Thibault ...  
 Appt Date: 08/19/2019 Unit Type: V (VISIT)  
 Received Date: 08/19/2019 Status: Open Consult Pending Addressed  
 Priority: Routine

Diagnosis / Reason  
 Reason  
 Sl. No Description  
 Diagnosis: Previous Dx Add Remove  
 Code Name Code Na  
 R51 Headache, chronic daily

Referring Physician Lookup  
 All Providers Preferred Providers By Facility  
 All Providers Specialty Search  
 kundo search City search Zip  

Name	Address	Specialty	Contact
Kundo, Krzysztof	289 Pleasant Street Fall Ri...	Neurology	777
Kundo, Krzysztof	289 Pleasant Street, Suite ...		501

Click on the ellipsis to find the specialist to whom the patient is being referred.

Referrals can also be made to an office rather than a specific provider if there is no specific preference within an office with multiple providers.

Next, add a reason for the visit and a diagnosis. If this referral was started in the “chronic daily headache” tab of the treatment section of a note, the diagnosis is automatically pulled in. If not, click “Add” and use Smart Search to find the appropriate diagnosis for the referral.

Include any helpful information in the “Clinical Notes” area of the referral request. Anything entered in the “General Notes” box may be published to the portal – but clinical notes are not published to the portal.

Under attachments, make sure “Attach Medical Summary” and “Attach CCR/CCD” are checked off (basic patient data that Meaningful Use requires electronic communications to include) – as well as the office visit note. ECW automatically selects the visit from which the referral is being generated, but if this is incorrect, click “Attach” to see other visit notes. Click on the magnifying glass to see a preview of the attached note.

For some offices, Claudia is designated as the referral coordinator for ALL referrals. For other offices, the specific referral coordinator in the particular office needs to be selected. In this case, choose either Claudia or Tracy Gabus. Then click “OK” - NOT “Send Referral”. The referral coordinator in the office will make an appointment for the patient, and inform the appropriate person (in this case, Ms. Pcare's daughter) of the appointment date/time. If an insurance authorization is needed, the referral coordinator will assign this to “Referrals, Central”. Authorization will be obtained, and the referral will be assigned back to the office manager of the PCP's office.

If no authorization is necessary, the referral coordinator in the specialist's office will bypass central referrals and assign the referral back to the PCP's office manager. If “Send Referral” has not yet been clicked, it will remain black, and when this comes back to the PCP's office after the appointment has been made and any insurance authorization obtained, “Send Referral” should be clicked. Central Referrals may have already sent the referral – in which case the office manager only needs to change the status to “Addressed”.

Allergy	Amanda Marshall
Chiropractic	Diane Benjamin
Endocrinology	Michelle Valkaos
Gastroenterology	Blanca Rivera
Gynecology	Brenda Pereira
Neurology/Douglas	Crystal Brehaut
Neurology/Dudha	Ashlin Pimentel
Neurology/Kundo	Tracy Gabus
Neurology/Morcos	Ana Pereira
Neurology/Steinberg	Lisa Bannister
Optometry	Nicole Botelho
Orthopedics	Rose Paquette
Otolaryngology	Heather Taborda
Podiatry	Judi Costa
Pulmonary	Cheryl Quinlan
Rheumatology/Rahman	Judith Vieira
Rheumatology/Fisher	Rose Paquette
Vascular	Laura Rose Newcomb
Sleep Medicine	Lynn Lamontagne
Medi Weight Loss	Dawn Depasquale
Physical Therapy	Kelly Levesque

In this case, I assigned this to myself – no authorization was needed for the visit. The visit date and time have been set up. The “Send Referral” button has not been grayed out, so I know this last step needs to be completed for this to satisfy the quality measure of electronic communication for referrals (and create an incoming referral for the specialist's office – needed for billing purposes).

After clicking “Send Referral”, I got an error message. There is an error in SNOMED mapping – this error should be corrected before sending the referral. If it is not corrected, you will not get “points” toward this Meaningful Use benchmark. In the Overview tab of the right panel, there is a link to the SNOMED error. These errors are discussed another document that can be found on the education site:

[http://www.drkney.com/Videos\\_BDK/11\\_SNOMED.pdf](http://www.drkney.com/Videos_BDK/11_SNOMED.pdf)

Patient: Pcare, Fifteen DOB: 01/12/1952 Age: 67 Y Sex: FEMALE

Click 'Assign' to locally link problem list to SNOMED instead of mapping at eClinicalWorks Cloud during the transition of care. User can assign SNOMED codes locally and those will be used during the transition of care.

Local Problem List-SNOMED Linking

Type	Problem Description	Problem Code	SNOMED Description	SNOMED Code	Clear	Assign
	Essential hypertension	401.9	* Essential hypertension	59621000		
	Type 2 diabetes mellitus without complication, without long-term current use of insulin	E11.9		313436004		
	Paresthesia	R20.2		91019004		

\* Indicates Auto assigned SNOMED Codes and Description in this session,\*\* Indicates assignment from custom mapping table.  
Users maintain responsibility for selection and/or verification of correct SNOMED codes.  
Clicking on 'Save' will save the SNOMED codes locally.

Save Cancel

One problem easily seen here is that an ICD-9 code is being used for essential hypertension. Clicking “Assign” could be used to fix the SNOMED mapping, but the best solution would be to delete the ICD-9 code and enter the correct ICD-10 code.

Now the SNOMED error is gone, and the patient no longer has an ICD-9 code on her problem list.

Overview DRTLA History eEHx PopHealth

Pcare, Fifteen 67 Y, F as of 08/19/2019

Right Panel data last modified on: 07/24/2019 12:10 PM

Problem List SNOMED

- Global Alerts
  - HIPAA SIGNED
  - HIPAA SIGNED
  - Insurance Alert
- CCM
  - Enrollment
    - Start Date:09/27/2017
    - End Date:09/27/2022
    - Consent Status:Yes Last CP:NA
    - Mins Completed: 00:00:00 Add Time
    - Timer: 00:00:00 start logs
    - Claims Status: NOT CREATED
- Advance Directive
- Problem List
  - R20.2 Paresthesia
  - E11.9 Type 2 diabetes mellitus without complication, without long-term current use of insulin
  - I10 Essential hypertension

Send Referral

This referral is ready to be sent electronically.

Send Reminder fax to Krzysztof Kundo at

774-365-6853

Send Cancel

Clicking on “Send Referral” brings up the screen to the left. Please uncheck the box to send a reminder fax. These faxes always fail, and also contain no useful information. After unchecking this box, click “Send”.

Notice that the “Send Referral” button is now light green with white lettering, as opposed to black lettering with a gray background.

Now the referral status can be changed to “Addressed” - and the referral disappears from the “R” jellybean.

1 Chronic headaches

Send Referral

Diagnosis Previous Dx Add Remove Procedures

Code	Name
R51	Headache, chronic daily

Scan Attachments (3) Logs OK Cancel Send Referral