



## Accepting a Referral

### Bridge Referral Application User Guide

## Notification of a new Referral

### Desktop Notification

If you are logged into the **GLHC Bridge**, but are not actively working in the Referral Application, you will receive a pop-up notification that contains information about the new referral.

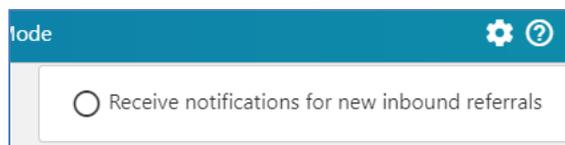


Clicking on the notification will launch the **Referrals** application and open the new referral.

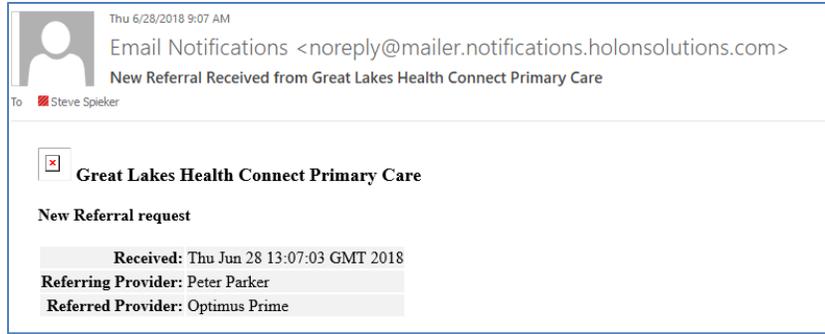
### Email Notification

If a user has an email address listed within their Referral Application profile then they can turn on email notifications by going to the setting icon (gear) within the referral application.

To turn on email notifications, select the gear icon in the upper right hand corner and click on the circle to the left of “Receive notifications for new inbound referrals”.



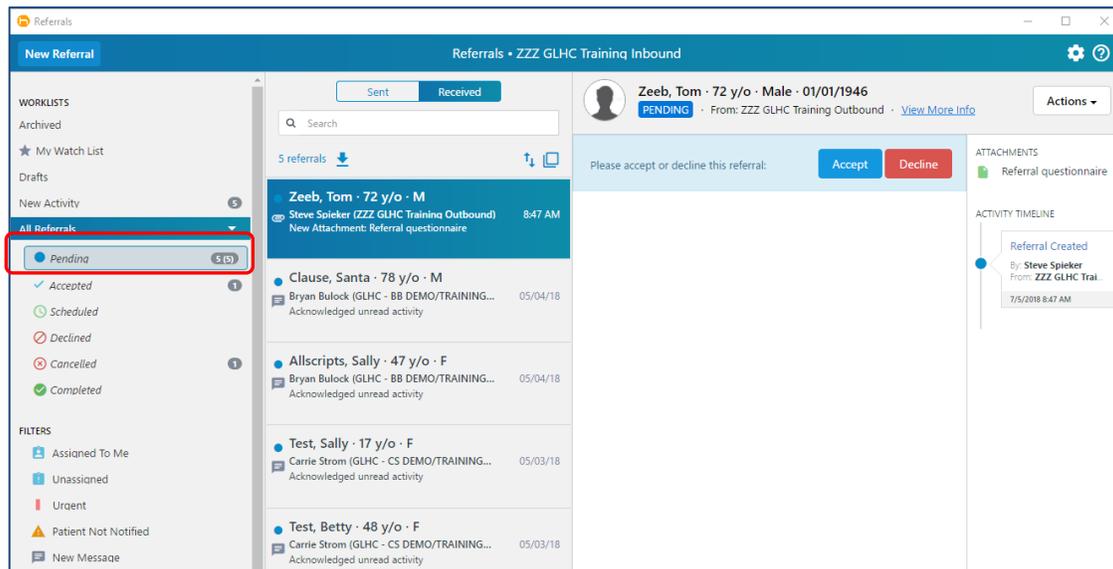
Once checked, you will receive a HIPAA compliant email notification on any new referral for all organizations you are assigned to.



You can also turn off notifications but unchecking the circle.

## Notification within the Referral Application

If you are logged in and viewing the Referral Application when a new referral is received, the referral will be in the **Pending** folder.

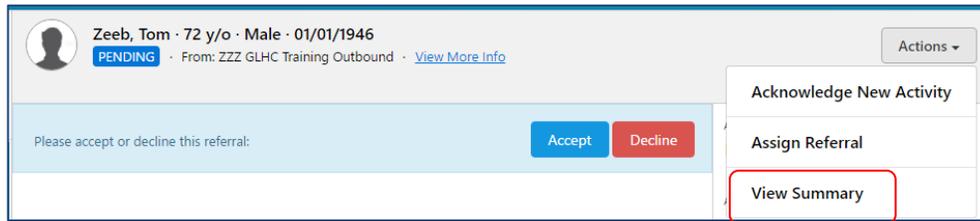


## Accepting a Referral

1. Click on the new referral in the Referral worklist
2. In the Referral Header section, click **Actions**. This will open a window that provides available actions on a specific referral.



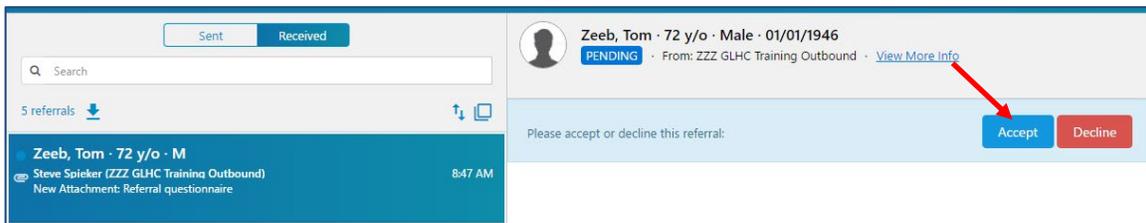
3. Click on **View Summary** to view the patient's demographics and answers to the questionnaire for this referral.



4. Click the large “X” to close the **View Summary** screen.

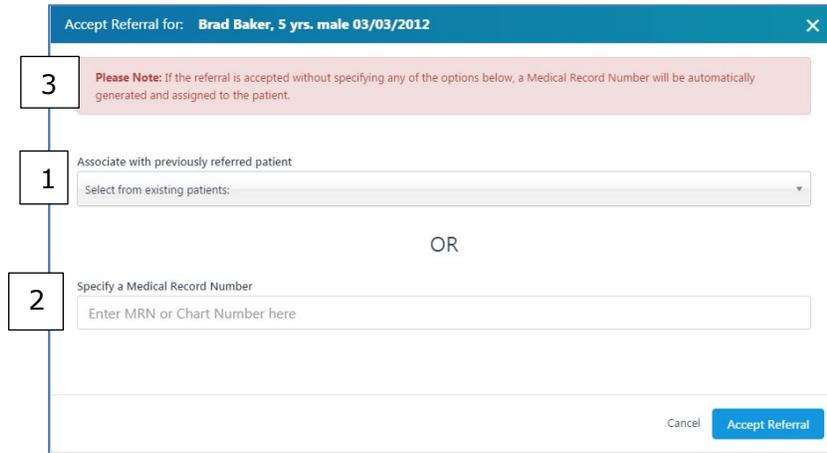


5. To accept the referral, click on the blue **Accept** button.



6. After clicking **Accept**, there are three options:

1. Associate the referral with a previously referred patient
2. Enter a MRN or Chart number of the patient you want to associate the new referral
3. Have the application automatically generate a Patient ID so it can be associated to other referrals for that patient in the future.



## Searching previously referred patients

Click in the **Select from existing patients** field.



Associate with previously referred patient

Select from existing patients:

Either scroll through the list of patients to select a matching patient or search for a patient by typing in First Name, Last Name, age, DOB or Medical Record Number.

Associate with previously referred patient

Select from existing patients:

test

CNRTEST, ANITA · 38 y/o · F · 01/01/1980 · (c6793982-26c9-4d12-9419-f3398eb8b257)

John, Test · 43 y/o · M · 01/01/1975 · (04954f8b-a505-4059-b47f-81419af01327)

module, test m · 36 y/o · M · 09/12/1981 · (18d7e124-9f0d-48a7-8faf-68694217a2c6)

monday, test · 4 y/o · M · 05/05/2014 · (b3eb2932-e810-4975-b447-e19e8f64de88)

Patient, Test · 18 y/o · F · 09/16/1999 · (522a9aaf-bd0c-4b34-ac5e-db784a70ad14)

**Note:** It is very important to search for existing patients before accepting a referral. Otherwise, you can generate 2 or more records for a patient.

## Matching

To assist in reducing matching errors, the system compares 4 demographic criteria: 1) the patient's First Name, 2) Last Name, 3) DOB and 4) Gender. If less than 4 criteria matches, a warning messages will display and the **Accept Referral** will display in yellow. Note: If the referral is accepted all demographics in the new referral will override the demographics in the system of the selected patient.

**Warning:** The patient demographics sent from the referring location do not sufficiently match the selected patient. If you accept this referral, all the demographics sent from the referring location will override the demographics of the selected patient in your system.

Cancel **Accept Referral**

If none of the criteria matches, an error message will display removing the option to accept the referral.

**Error:** The patient demographics sent from the referring location do not match the selected patient. Please select a different patient from the list or clear your selection to create a new patient in your system.

Cancel

To remove the error and try again, either select Cancel or select the "x" to the right of the patient's name in the search field.

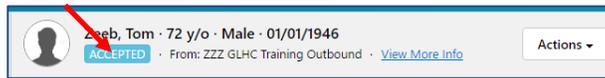
Associate with previously referred patient

Ant, Angela · 17 y/o · F · 07/08/2000 · (dd67fa86-b9fb-4628-9868-21a3ce5bd567)

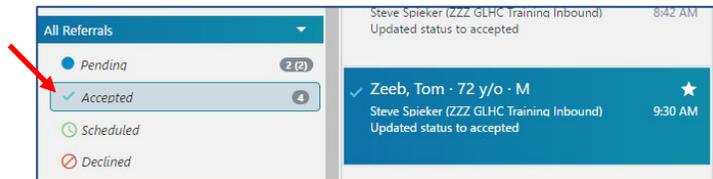


## After a Referral has been accepted

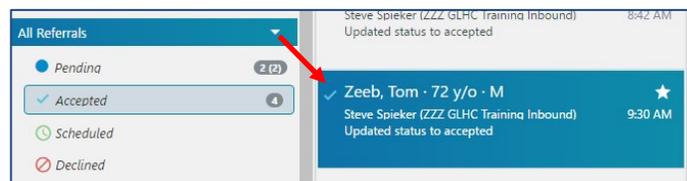
Several changes will occur when a referral is accepted. 1) The referral is marked as **Accepted** in the Referral Header section.



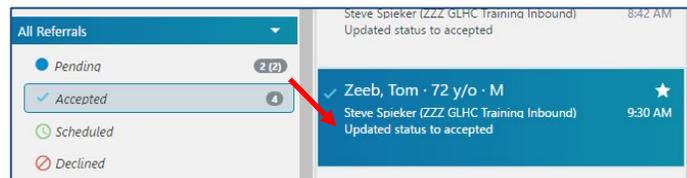
2) The referral will transfer to the Accepted status section.



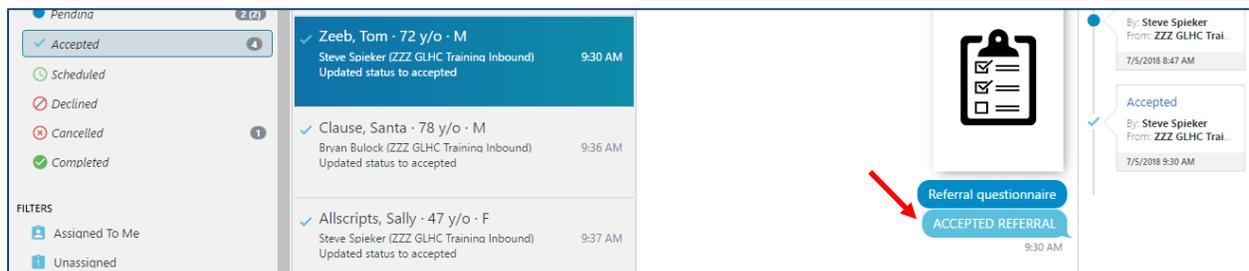
3) The icon for the referral will change to a blue checkmark.



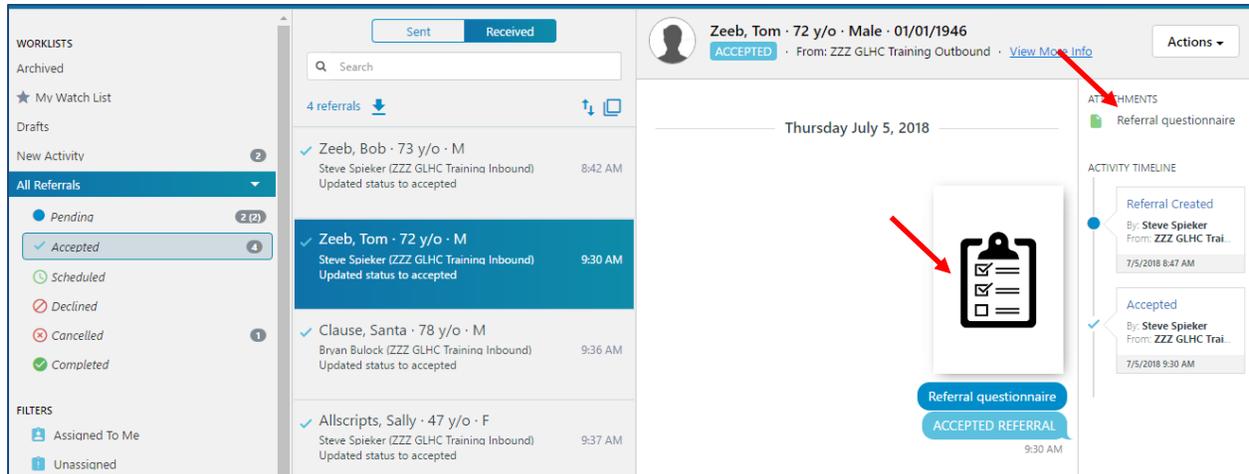
4) The Referral Header will display that last activity of "Updated status to accepted".



5) The activity of "Accepted Referral" will display in the Referral Message section.



6) The Questionnaire and other Attachments will display in the Referral Message section and the Timeline section.



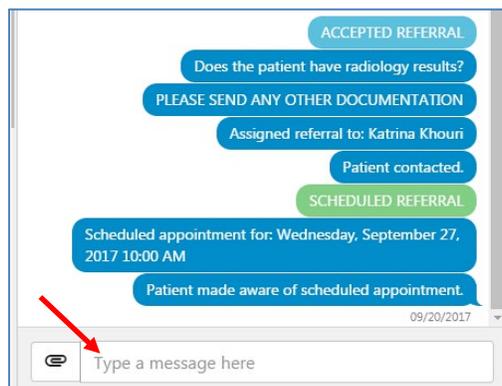
## Communication between sending and receiving organizations

The Bridge Referral Application allows users and organizations to communicate with each other about a referral.

Communicating within the application is more effective than phoning and faxing.

To send a message:

1. Click your mouse inside the box that says, **Type a message here** located at the bottom of the Referral Details section
2. Type your message
3. Click Enter



The communication features is available throughout the referral process, including before it is Accepted and after it is marked Complete.