



Completing a Referral

Bridge Referral Application User Guide

In order to assist in true coordination of care, referrals should be updated to reflect their status.

If referrals are completed, but not marked as **Complete**, they remain in an **Accepted** or **Scheduled** status. This inaccuracy creates confusion for other users in the Referral Network, and the tracking of referrals.

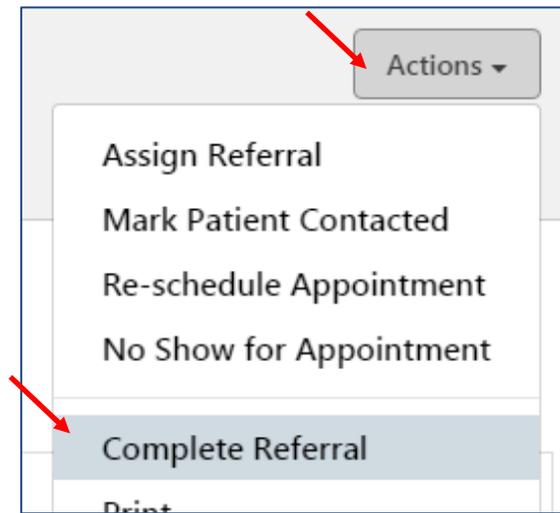
Therefore, it is a best practice that all referrals be marked as **Complete** once the patient has been seen at your organization or the episode of care is finalized (i.e. behavioral health, physical therapy, etc.).

How to Complete a Referral

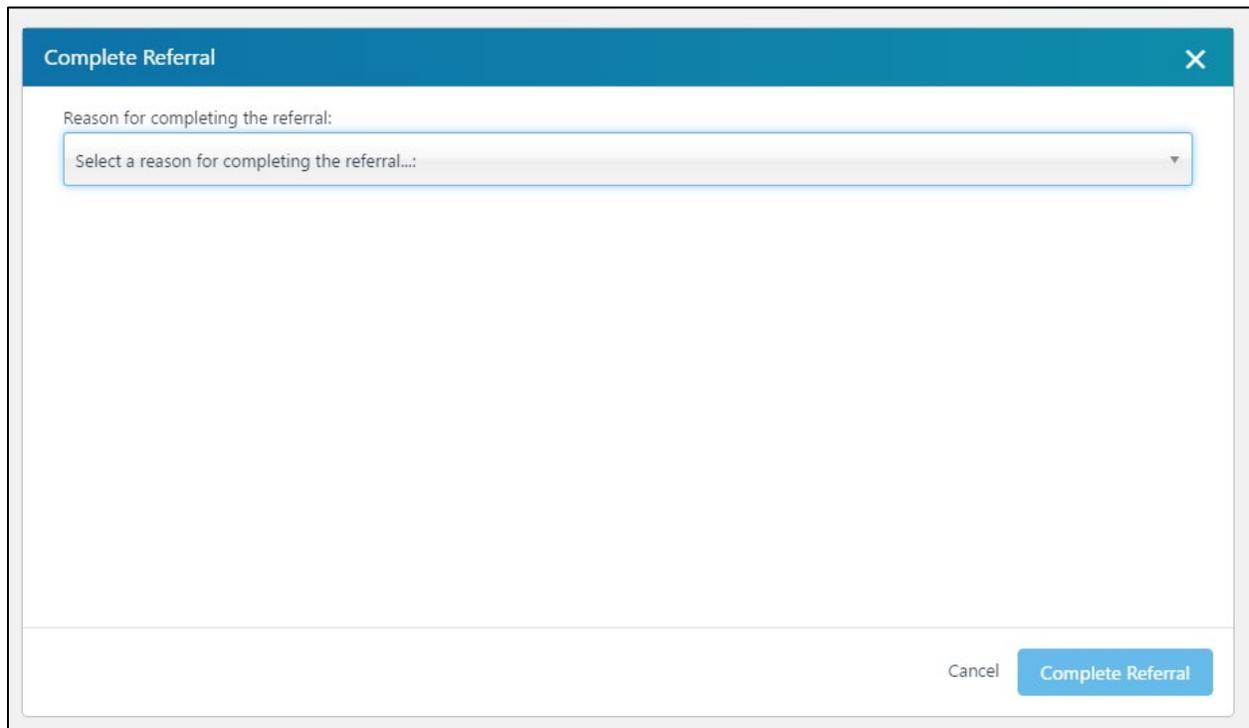
1. Click on the referral in the Referral Worklist panel. The referral will turn blue and the details of the referral will display to the right in the Referral Detail panel.

 Betty Smith, 33 F Katrina Khouri (Childrens Healthcare Access Program) Patient made aware of scheduled appointment.	10/04/17
 Busy Bee, 95 F  Katrina Khouri (Childrens Healthcare Access Program) Patient contacted.	10/04/17
 Minnie Mouse, 18 F Katrina Khouri (Childrens Healthcare Access Program) Updated status to accepted	10/04/17

2. Click on the **Actions** button in the upper right hand corner. The available actions will display. Click **Complete Referral**.

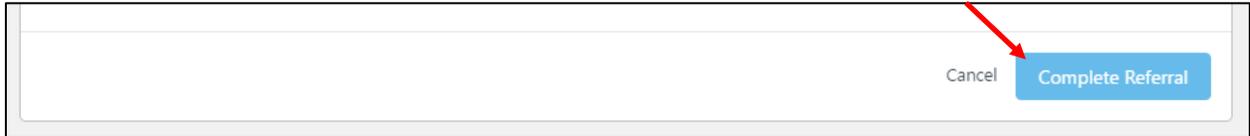


3. A new window will open. Use the dropdown menu to select a reason for completing the referral or select "Other" to enter free text. Documenting the reason for completing is important for reporting and care coordination purposes.



A screenshot of a dialog box titled "Complete Referral". The dialog box has a blue header bar with a close button (X) in the top right corner. Below the header, there is a label "Reason for completing the referral:" followed by a dropdown menu. The dropdown menu is currently showing "Select a reason for completing the referral...". At the bottom right of the dialog box, there are two buttons: "Cancel" and "Complete Referral".

- Once a reason for completing has been selected or free text has been entered, click **Complete Referral**. This finalizes the process of completing the referral. Click “Cancel” to exit the completion process without marking the referral as Complete.



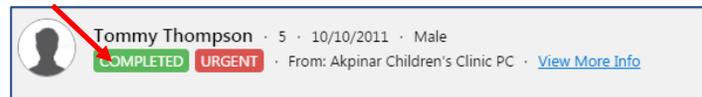
Confirmation of Completion

After a referral has been marked as **Complete** by the receiving organization, there are several way to confirm the change in status.

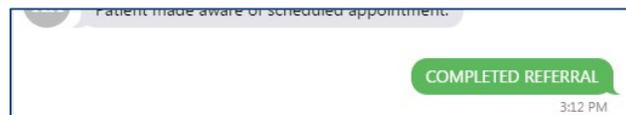
- In the Referral Worklist panel, a green check will appear next to the patient’s name.



- “COMPLETED” will appear with green highlight under the patient demographic information.



- A message, and the reason for completion, will be added to the Referral Details panel notifying both organizations of the change in status.



- The user name, location name, and time of completion will be documented in the Timeline panel.

