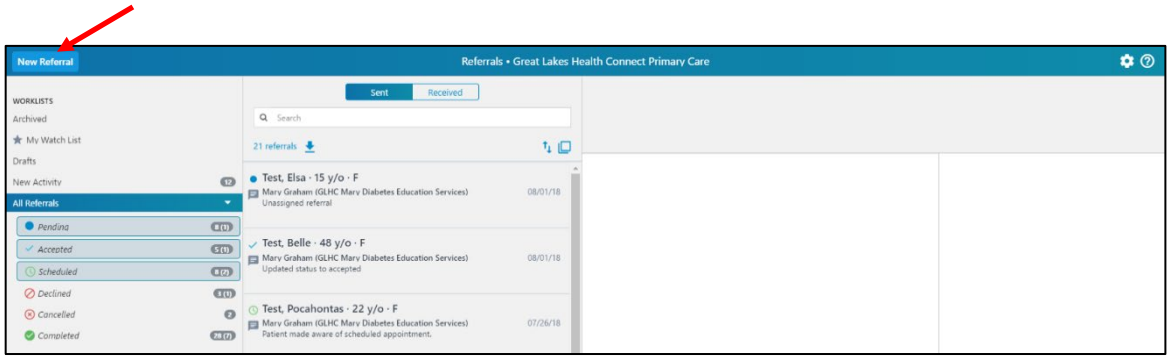
Creating and Sending a Referral

Bridge Referral Application User Guide

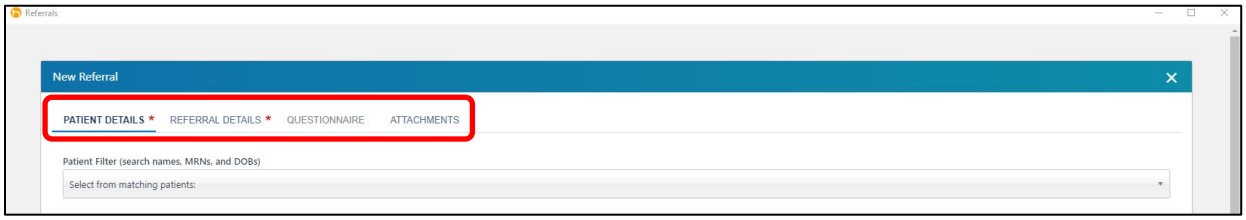
Creating and sending a referral is one of the most important processes within the GLHC Referral Application. Sending a referral signifies a transition of care for a patient.

How to create and send a referral

1. Open the Referral application and click the **New Referral** button in the upper left hand corner of the window.



2. A new window will open within the Referral Application. This window is titled “New Referral”.
   a. Below the blue header, there are four “tabs”: Patient Details, Referral Details, Questionnaire, and Attachments.
   b. A red asterisk indicates that not all required information has been entered on that tab.

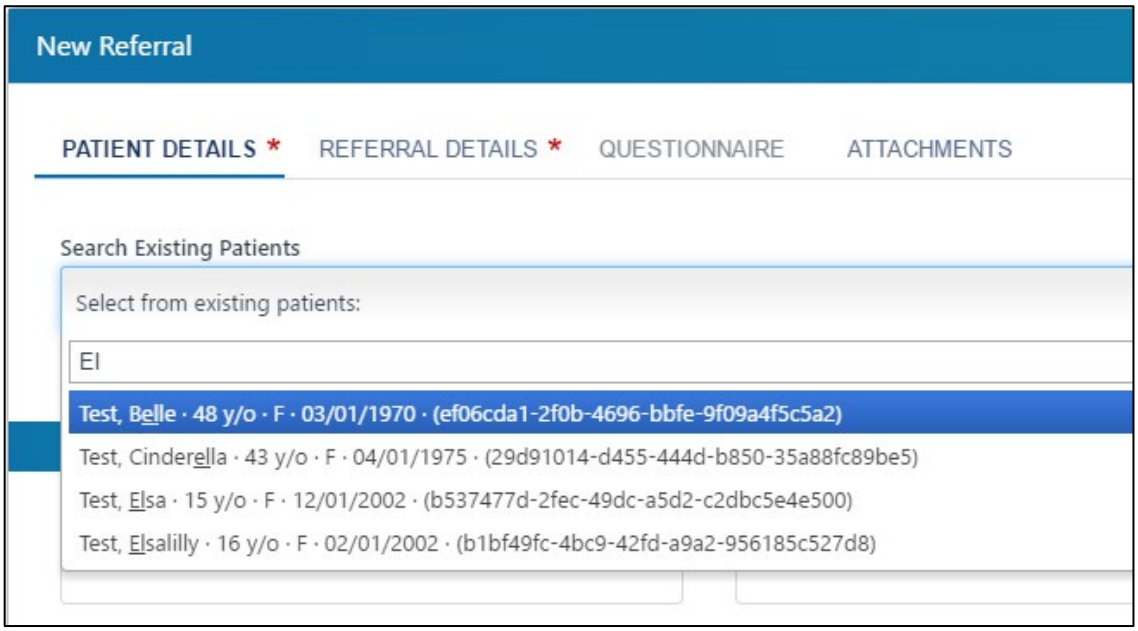


Patient Details

Information on this tab of the Referral is about the patient.

Search for the patient using the patient's name, medical record number (MRN), or date of birth (DOB).

1. Successful Search
   - Select the patient from the list of results.
   - Review the information about the patient for accuracy and make necessary updates and additions. It is best practice to enter all information available about the patient.



2. Unsuccessful Search
   - Check spelling of search criteria and consider searching for alternate patient information.
   - Enter the patient details in the appropriate fields. Information that is required is marked with a red asterisk. It is best practice to enter all information available about the patient.
   - There are five sections of Patient Details:
     1. Demographics
     2. Contact Info
     3. Social Info
     4. Insurances
     5. Social Support

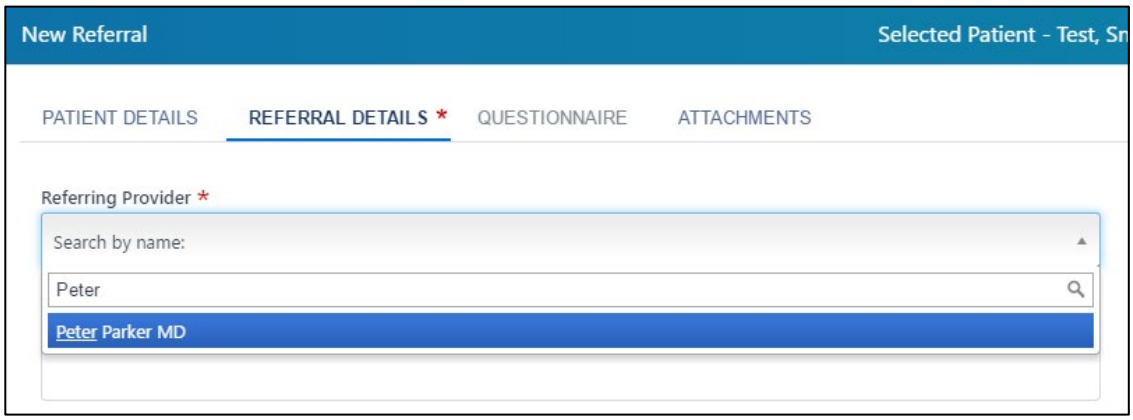
Confirm that all patient detail information is entered and accurate. The red asterisk next to Patient Details will disappear of all required information has been added.

Once completed, click on the Referral Details tab.

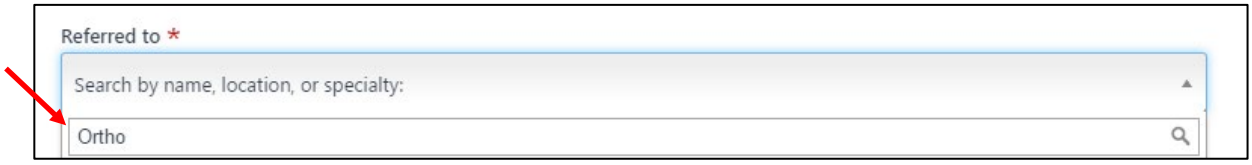
Referral Details

This tab of the Referral is for information about what provider is making the referral, where the referral is being sent, and some basic information about why the referral is being sent.

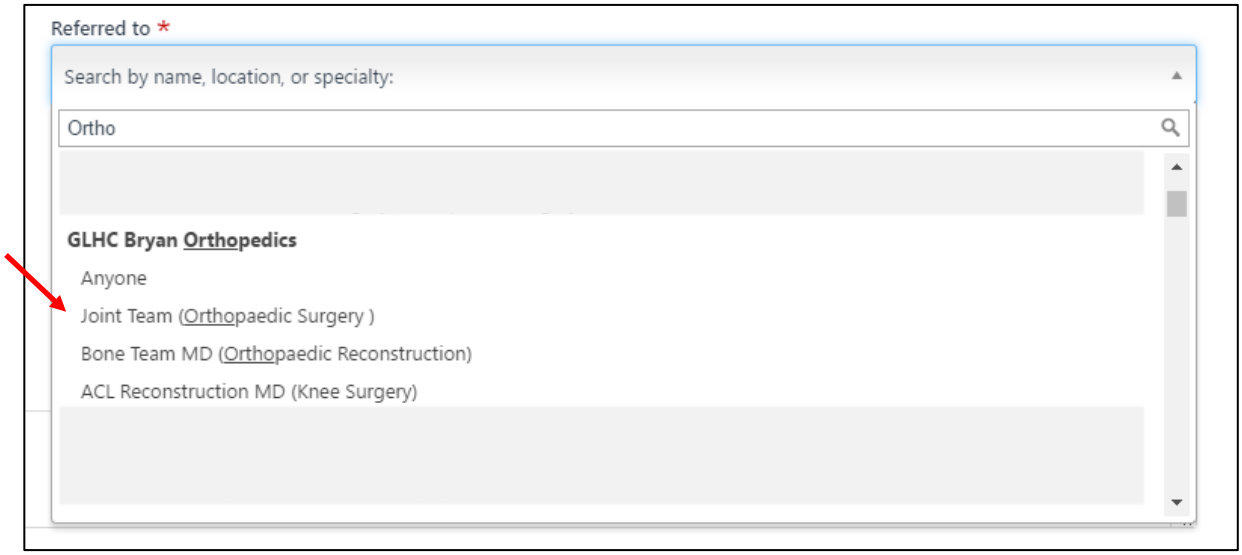
1. Search and select a **Referring Provider** from the drop down list. This is a list of provider or teams that are affiliated with your organization. Contact your Referral Administrator to make changes to this list.



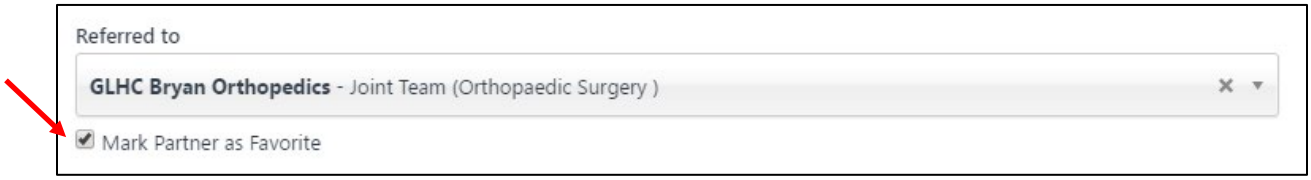
2. Search for a partner to receive the referral in the "Referred to" field. Search by name, location, or specialty. The most recent and favorite organizations will appear first.
    a. The referral can be sent to "Anyone" at that organization, meaning that any provider or care team can see the patient.
    b. The referral can be sent to a specific provider.
    c. The providers and teams that display for each organization is determined by the Referral Administrator(s) at that organization.



3. Select a provider by clicking on the name.



3. After selecting the provider/organization to send the referral, the organization can be marked as a favorite. This means that next time you are selecting a provider and organization to send a referral this organization will be near the top of the list and easy to find.



4. Enter the **Condition** and **Reason for Referral.**
   a. The **Condition** is the medical or care reason why this patient is being referred.
   b. The **Reason for Referral** is the services that the patient needs at the receiving organization.
   c. Examples:
      - Lung Mass – Consult and Treat
      - Recurrent ED Use – PCP Follow Up
      - Knee Pain - MRI

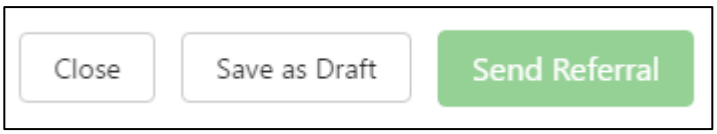
5. Enter any necessary **Authorization Information.**

6. If applicable, mark the referral as **Urgent.**

7. Enter any **Comments.**

8. Confirm that all referral detail information is entered and accurate. The red asterisk next to Referral Details will disappear of all required information has been added.

9. At this point in the referral process, the referral can be saved as a Draft. The referral cannot be sent because there is information required on the Questionnaire tab. Clicking the close button will exit the window and not save the referral.



10. Once all Referral Details information is complete, click on the Questionnaire tab at the top of the window.

Questionnaire

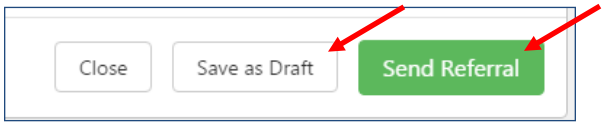
Each organization's Referral Administrator(s) set up the Questionnaire. This form informs the sending provider about the organization and asks questions about the patient and the referral.

There are many different question types. Required questions are marked with an asterisk.

At the bottom of the Questionnaire the organization can add attachments for you and or the patient. These attachments can be additional forms, brochures, maps, etc.

Review all information on the Questionnaire before selecting a next step:

1. Closing the referral (this will not save the referral)
2. Adding attachment
3. Saving as a draft
4. Sending the referral



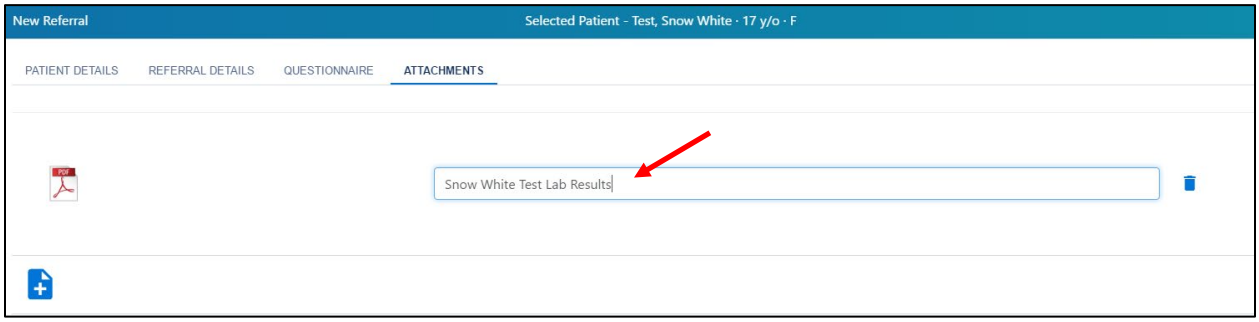
Attachments

Documents can be added to the referral using this tab. Many organizations instruct the sending organization on what documents should be attached within their Questionnaire.

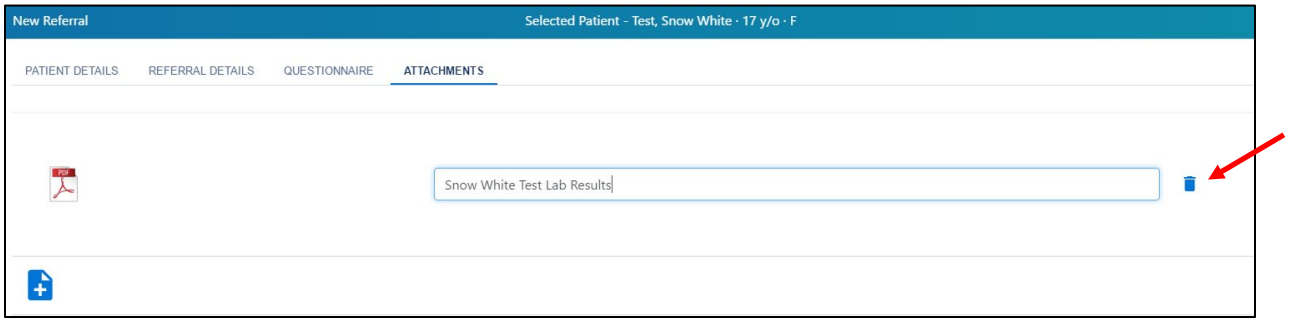
1. Click the document plus sign icon.

2. This will open the file manager on your computer. Locate the necessary document and click open.

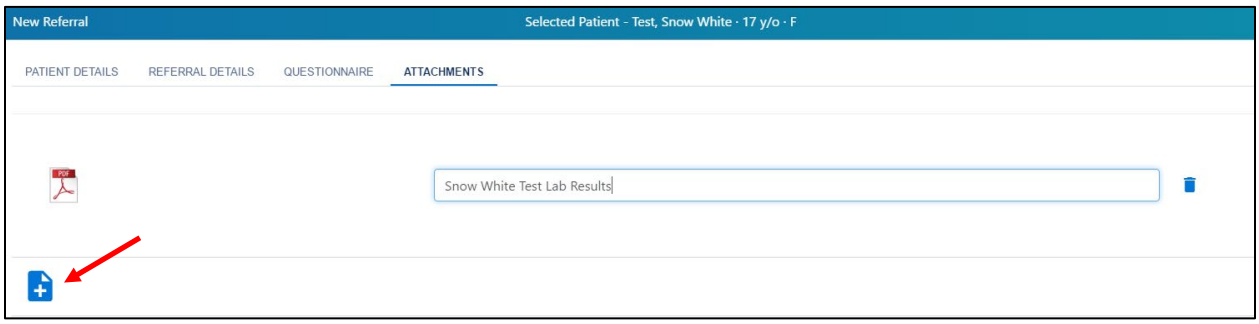
3. The name of the document will display in a text box field. Edit the name of the document if necessary.



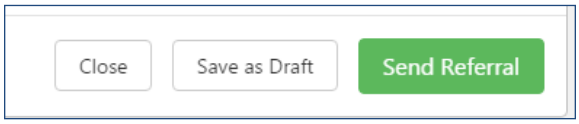
4. At this point an attachment can be deleted from the referral by clicking on the trach can icon.



5. Additional documents can be added by clicking on the document plus sign icon again.

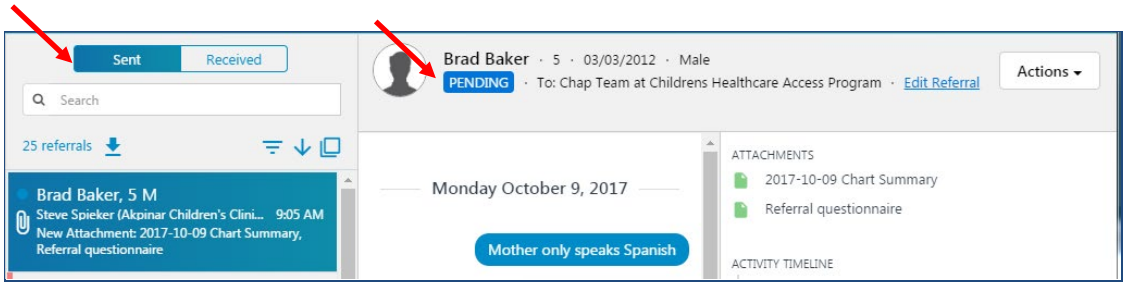


6. Review that all attachment are correct before moving onto the next step in sending the referral, either closing the referral (the referral will not be saved), saving as a draft, or sending the referral.

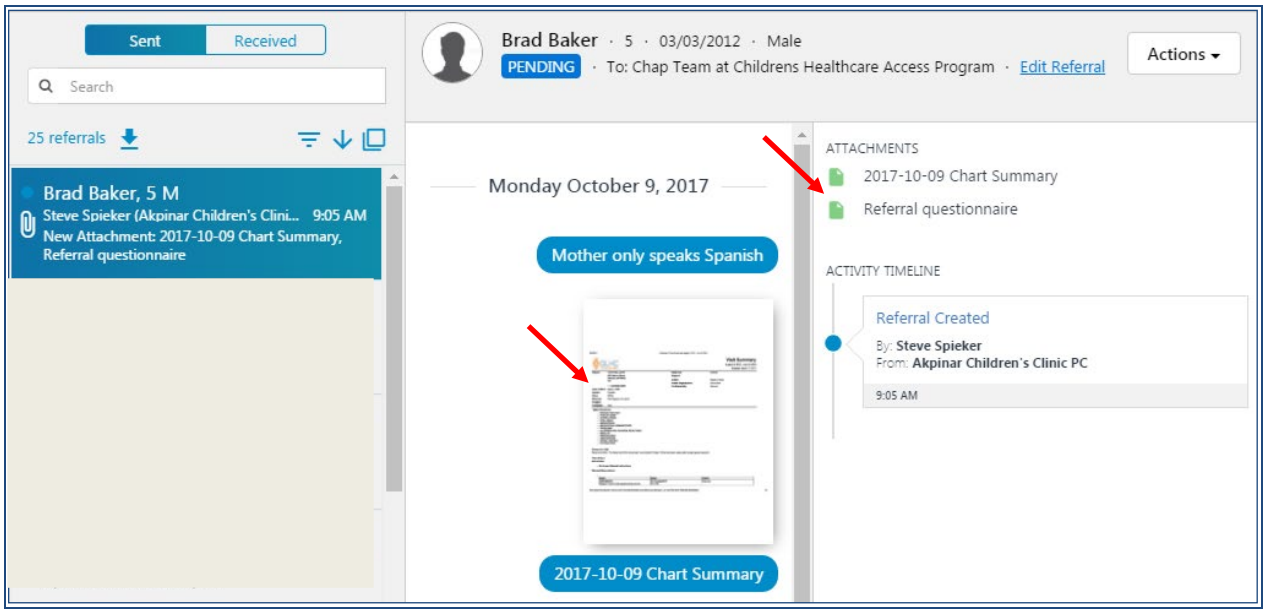


Locating and Reviewing a Sent Referral

1. After a referral is sent it will be in the Sent Worklist and in the status: Pending.

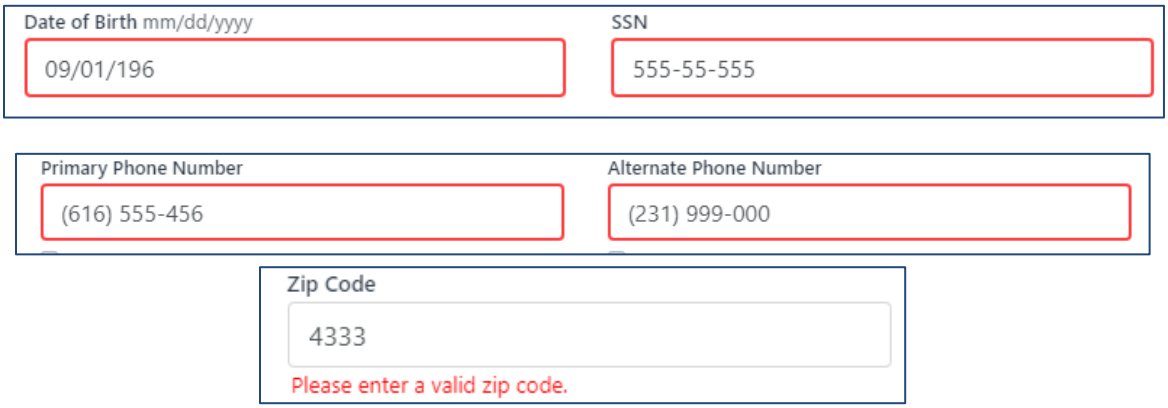


2. The Questionnare and any other attachments will be listed in the chat window and in the Timeline panel.



Notes about sending a referral

The referral will not send unless all required data is valid (DOB, SSN, Phone Numbers and Zip Code). Therefore, it is very important to review all entered information within the **Patient Details** section to confirm that the information is correct.



Depending on who you are referring to, it is also important to confirm that you are following the HIPAA guidelines within your office on what information should be sent to that organization (i.e. SSN, Insurance, Diagnosis, etc).