



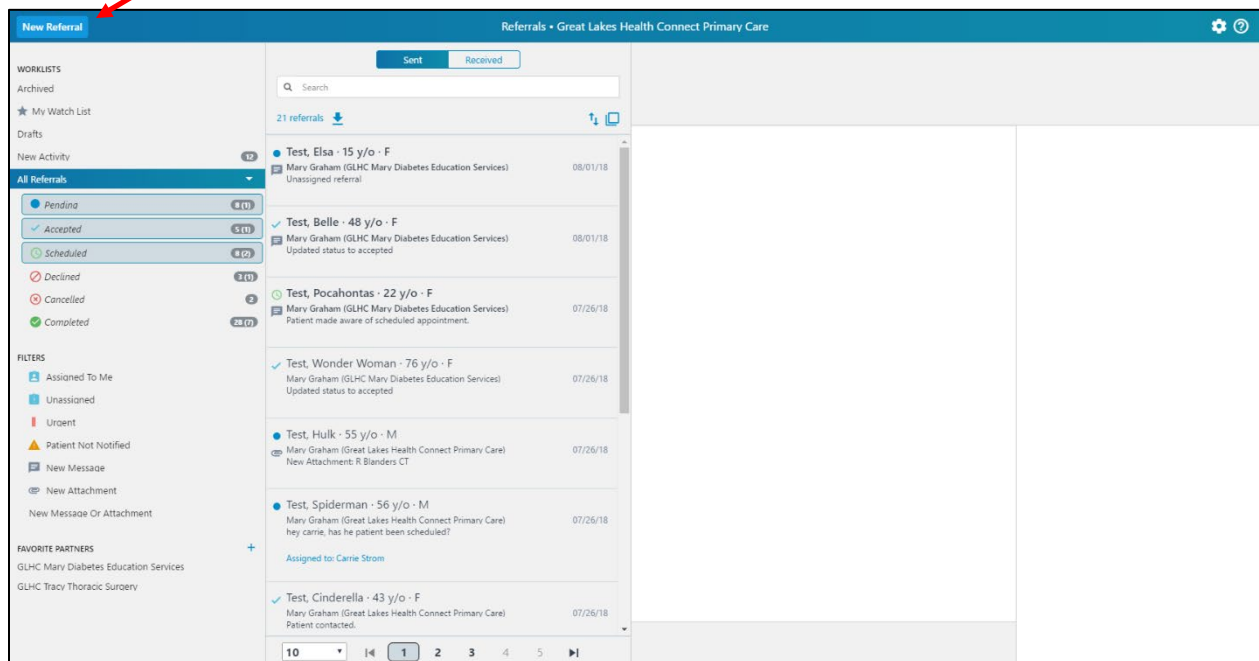
Saving a Referral as a Draft

Bridge Referral Application User Guide

It is common to be in the middle of creating and sending a referral and to then be called away from your desk or to need to complete another task. The GLHC Bridge Referral Application allows users to save the referral and come back to it later to update it and to send it.

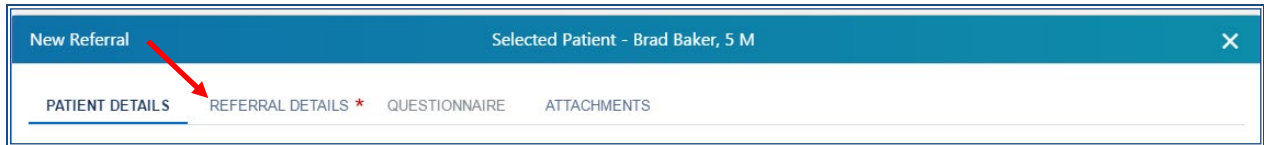
How to Save a Referral as a Draft

1. Click **New Referral** in the upper left hand corner of the Bridge Referral Application.



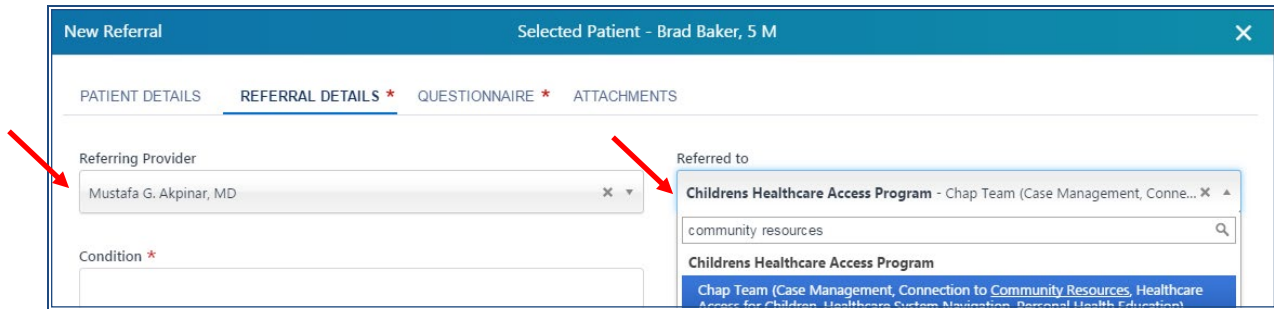
2. In the **New Referral** window, select a patient from the list of existing patients or create a new patient.

3. Confirm that all Patient Details are accurate. Then click to the next tab, **Referral Details**.



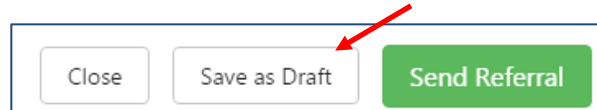
The screenshot shows a window titled "New Referral" for "Selected Patient - Brad Baker, 5 M". At the bottom, there are four tabs: "PATIENT DETAILS" (which is underlined and has a red arrow pointing to it), "REFERRAL DETAILS *", "QUESTIONNAIRE", and "ATTACHMENTS".

4. Select a **Referring Provider** and an organization or provider that this referral is being **Referred to**.



The screenshot shows the "New Referral" window with the "REFERRAL DETAILS *" tab selected. The "Referring Provider" field contains "Mustafa G. Akpinar, MD" with a red arrow pointing to it. The "Referred to" dropdown menu is open, showing a search for "community resources" and a list of results including "Childrens Healthcare Access Program" and "Chap Team (Case Management, Connection to Community Resources, Healthcare Access for Children, Healthcare System Navigation, Personal Health Education)". A red arrow points to the dropdown menu.

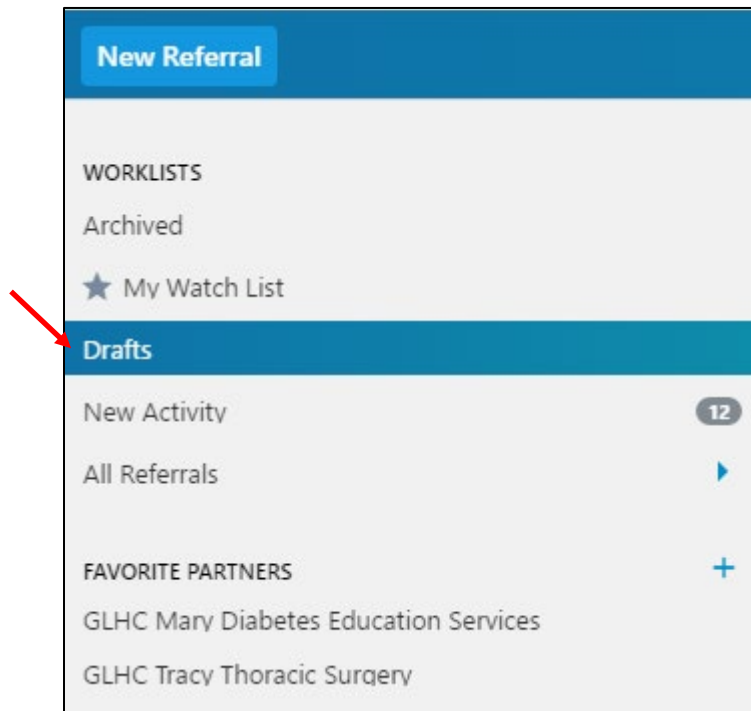
5. Enter the **Condition** and **Reason for the Referral**. **Authorization Information** and **Comments** can also be added on this tab. Use the **Urgent** checkbox, if necessary.
6. At and after this point in the process of sending a referral it can be saved as a draft by clicking **Save as Draft** at the bottom of the window.



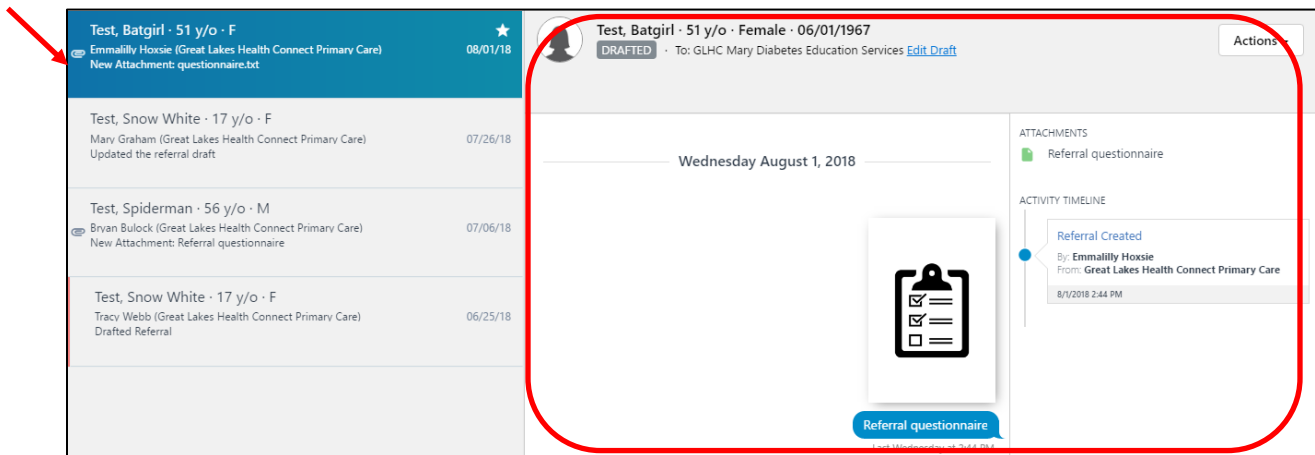
The screenshot shows three buttons at the bottom of the window: "Close", "Save as Draft" (with a red arrow pointing to it), and "Send Referral".

How to Locate and Update a Draft Referral

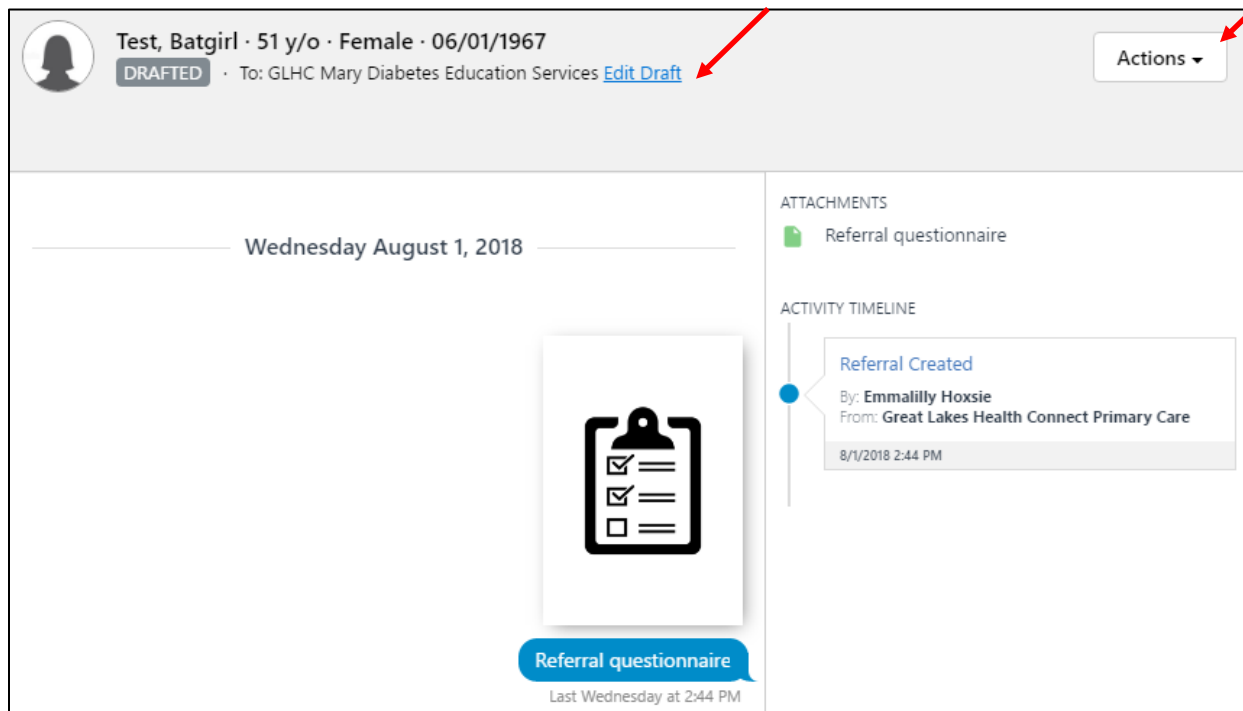
1. A referral that has been saved as draft will be in the **Drafts** folder in the Organization panel.



2. Click on the referral that needs to be completed. The details will appear in the right columns.



3. There are two ways to edit the draft referral.
 - a. Click **Edit Draft**
 - b. Click the **Actions** button and then click **Edit Draft**.



The screenshot shows a patient referral card for 'Test, Batgirl · 51 y/o · Female · 06/01/1967'. The status is 'DRAFTED' and it is 'To: GLHC Mary Diabetes Education Services'. There is an 'Edit Draft' link and an 'Actions' dropdown menu. The card displays the date 'Wednesday August 1, 2018' and a 'Referral questionnaire' attachment. The activity timeline shows 'Referral Created' by 'Emmalilly Hoxsie' from 'Great Lakes Health Connect Primary Care' on '8/1/2018 2:44 PM'. A red arrow points to the 'Edit Draft' link, and another red arrow points to the 'Actions' button.

4. Both options will open a new window, it will be titled “Edit DRAFTED Referral”. The referral details will display from when it was last saved as a draft.



The screenshot shows the 'Edit DRAFTED Referral' window for 'Patient - Test, Batgirl - 51 y/o - F'. The window has tabs for 'PATIENT DETAILS', 'REFERRAL DETAILS *', 'QUESTIONNAIRE *', and 'ATTACHMENTS'. The 'Demographics' section is active, showing fields for First Name (Batgirl), Middle Name, Last Name (Test), Medical Record Number (5b3a6db1-6bfc-4b11-b1aa-f64e7975678b), Gender (Female selected), Date of Birth (06/01/1967), and SSN (XXX-XX-XXXX).

5. Make the necessary updates and changes to the referral.
6. Save the updates by clicking **Update Draft** at the bottom of the window.



The screenshot shows three buttons: 'Close', 'Update Draft', and 'Send Referral'. A red arrow points to the 'Update Draft' button.

How to Send a Draft Referral

1. A referral that has been saved as draft will be in the **Drafts** folder in the Organization panel. (See screenshots above.)
2. Click on the referral that needs to be completed. The details will appear in the right columns.
3. There are two ways to edit the draft referral.
 - a. Click **Edit Draft**
 - b. Click the **Actions** button and then click **Edit Draft**.
4. Both options will open a new window, it will be titled “Edit DRAFTED Referral”. The referral details will display from when it was last saved as a draft.
5. Make the necessary updates and changes to the referral.
6. To send the referral click **Send Referral** at the bottom of the window.

