# Tip Sheet 2: Creating an Orders Only Encounter for a Referral

Epic Clinical Referrals

If you are asked to refer a patient on behalf of one of your providers to another practice within Mass General Brigham, you would do so through the Orders Only activity.

## Creating an Orders Only Encounter for a Referral

1. From the Epic Hyperspace toolbar, click **Orders Only** (you can also access via **Epic** > **Patient Care** > **Orders Only**).

2. Search for the patient by full name and date of birth.

3. In the ***Provider*** field, enter the referring provider.
   - If the referring provider is also the patient's PCP, you can click on the **PCP** button which will auto-populate the *Provider* field with the PCP.
   - The Department will usually be the same as your log-in department for the request.
   - *If you are an RN, you will not see this New Encounter box to complete and can skip to step #5.*

4. Click **New**.

5. Click into the **Add Order** field on the bottom left corner of the screen.
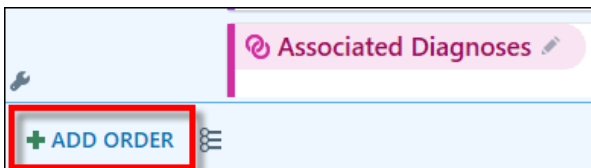
6. Type the name of the referral order (to see all MGH referral options, simply type "MGH Referral").
   - To search from a list of options, click the **+** icon in the ***Add Order*** field and then click **Referrals**.
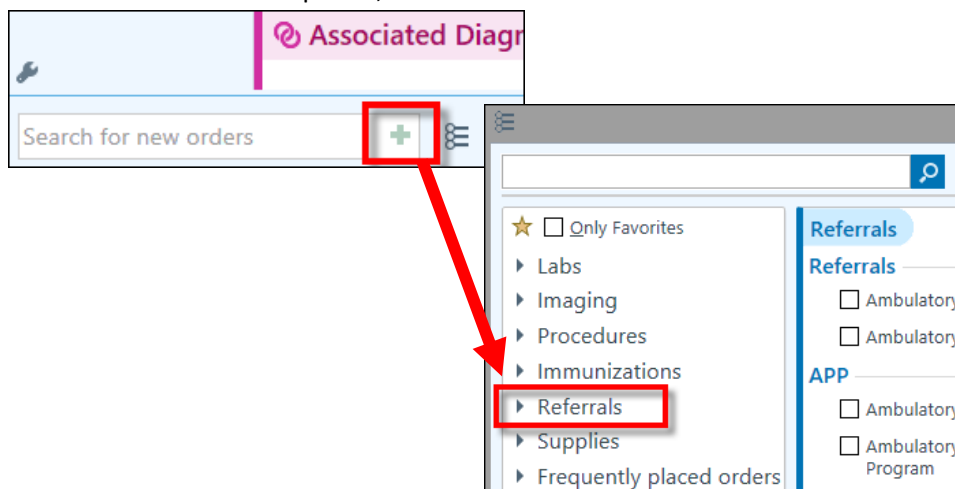
7. If the **Facility List Search** window defaults to Preference List, you will want to switch over to the **Facility List** tab in order to see all referral orders across MGH.
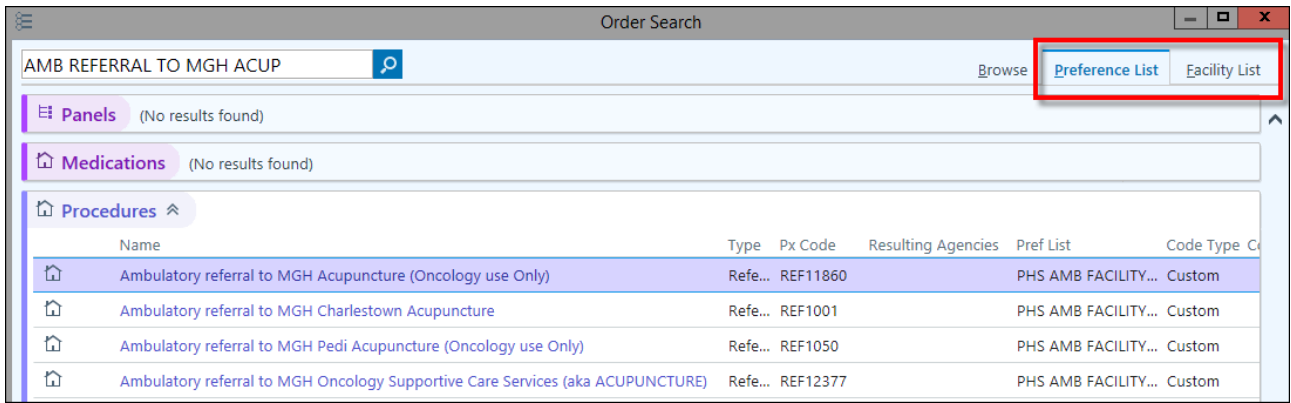
8. Double-click the referral to select it.

9. On the referral questionnaire, complete any required questions.

> **NOTE:** For MGB to MGB referrals, the **Class** should be "Internal".

10. To add any additional information about the request, use the **Comments** field (you may need to click the **Show Additional Order Details** link to view the Comments field).
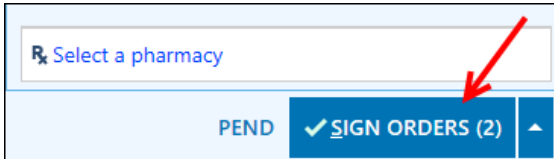

11. Click **Accept**.

12. Click the **Sign Orders** button on the bottom right corner of the screen.

13. From the Providers window, enter the *Order mode*. The selections for transcribing orders from MGB providers should be as follows:

- **Order mode:** Per protocol: no cosign required

- **Ordering Provider:** This should be name of the referring provider.

- **Authorizing Providers:** Pre-populates based on Ordering Provider.

- **Entered by:** If you are in a non-licensed professional role, enter "**ORDER MODE, SUPPORT STAFF**." If you are an RN, this field will pre-populate with your name based on your log-in.

> **HINT:** After you enter **ORDER MODE, SUPPORT STAFF** the first time, you can enter "**support**" to quickly populate the full title thereafter.

Result: The referral order is now in the appropriate referral workqueue for scheduling and is also available from the patient's Appt Desk.