

Tip Sheet 4: Transcribing Referrals Received via Phone, Fax, or Email

Epic Clinical Referrals

When referral orders are received via phone, fax, or email, they must be transcribed in Epic.

Transcribing a Referral

1. From the Epic Hyperspace toolbar, click **Transcribe Order** (you can also access via **Epic > Patient Care > Transcribe Order**).
2. Search for the patient by full name and date of birth. If the appropriate patient appears in the search, select their name. **If the patient is not registered, they must be registered first before proceeding.**
3. In the New Encounter window, search for the referring provider in the **Provider** field.
 - If the referring provider is also the patient's PCP, click the PCP button which will auto-populate the provider field with the PCP.
 - If the referring provider is not listed, type "Provider not in system."
 - The Department will usually be the same as your log-in department for the request.

The screenshot shows a 'New Encounter' dialog box. The title bar reads 'New Encounter for Zzzzphsperstest, Eightyfive'. The dialog has three main input fields: 'Date' (2/18/2020), 'Provider' (TAVANO, PHILIP JOHN) with a 'PCP' button, and 'Department' (MGH REFERRAL MGMT). At the bottom are 'Accept' and 'Cancel' buttons.

4. Click **Accept**.

Provider Not in System

If “Provider not in system” was entered, take the following steps to request the provider be added to the database for future use before proceeding with the order.

- Select the **Registration** activity tab (top of activity).
- In the next window, click on **Add'l Provider Info**.
- In the **Referral provider** field, type “**Provider not in system.**”
- Enter all known information about the referring provider in the **2. Referring Not in System Information** section. To prevent delay in the provider registration process, it’s recommended to complete all fields. The NPI# is preferred, if known.
- Click **Finish**. This sends the request and returns you to the Order Encounter screen.

The screenshot shows the Epic Registration form. The 'Add'l Provider Info' button is highlighted in red. The 'Referring provider' field contains 'REFERRING, NOT'. Below this, there are two sections: '1. Attending Not In System Information' and '2. Referring Not In System Information'. The '2. Referring Not In System Information' section is also highlighted in red and contains the following information:

Referring MD Name:	John Smith	Sex:	
Specialty:	1	Address:	1
City:	Dracut	State:	Massachusetts
Zip Code:	01826	Country:	United States of America
Phone:	978-555-6666	Fax:	978-555-7777
NPI:		Title:	

- If records are required and received from the patient, follow your department protocol to scan into Epic.
- Click the **Add Order** field (bottom left corner of screen).
- Search and select the appropriate MGH ambulatory referral order(s) for the service.
- Complete the referral order and any required questions. Use the **Comments** field to add any additional information about the request.

NOTE: The **Class** for outside orders should be “**Incoming**” unless you are transcribing an order from a MGB Health care Provider in which case the class should be “**Internal**.”

Ambulatory referral to MGH Physical Therapy

Class:

Referral: Priority:

Location:

Reason for Referral:

Specific instructions / precautions:

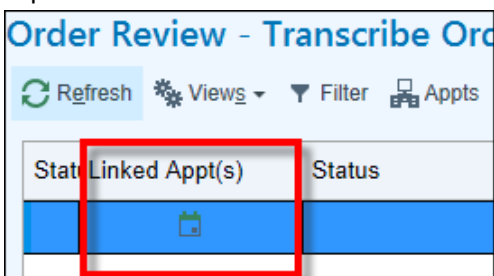
8. Click the **Sign Orders** button (bottom right corner of screen).
9. The Providers window appears. The selections for transcribing orders from Non-Partners Providers is as follows:
 - **Order Mode box:** Outside order
 - **Ordering Provider:** This should be name of the referring provider.
 - **Authorizing Providers:** Pre-populates based on Ordering Provider.
 - **Entered by:** If you have a non-clinical role, type **“ORDER MODE, SUPPORT STAFF.”** If you are an RN, this field pre-populates 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.

10. Click **Accept**.
Result: The order now appears in the appropriate referral workqueue for scheduling and is also available from the patient’s Appt Desk.

Scheduling a Referral from the Transcribe Order Activity

1. To schedule the referral directly from the Transcribe Order activity, click **Order Review** in the Transcribe Order menu (top left corner of activity).
2. Make sure the appropriate referral order is selected in the Order Review list and then click **Sched** on the toolbar. This takes you to the Make Appointment activity and automatically links the appointment being scheduled to the referral order.
3. You can verify that the scheduled appointment is linked on the **Order Review** screen or on the **Appt desk**. On the Order Review screen, the Linked Appt column will have a calendar icon. The Appt Desk displays a clipboard icon.



Dept	Appt / Appt Notes	ORD
MGPOSPTSPT [10020010411]	Back pain	

Result: Once the appointment is scheduled, the referral automatically falls off of the workqueue and the Scheduling Status automatically updates from “Ready to Schedule” to “Scheduled.”