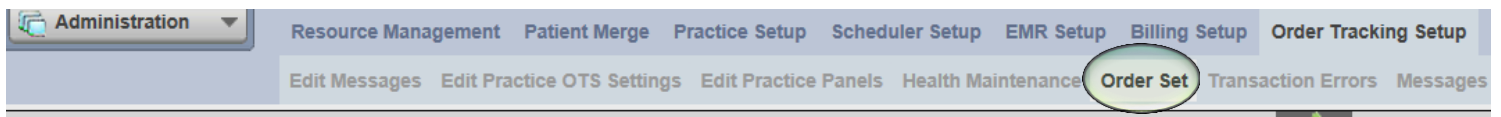


Creating an Order Set for Outgoing Referrals









1 Purpose: Creating an order set for outgoing referrals allows the user to select specialists/physicians that are commonly used in the orders and procedure section of the EMR Note.


2 Order Set: Users can create a new Order Set or Outgoing Referral List by going to **Administration>Order Tracking Setup>Order Set**



3 Adding a Panel: Under Order Set select 'Add Panel' to create a new panel:

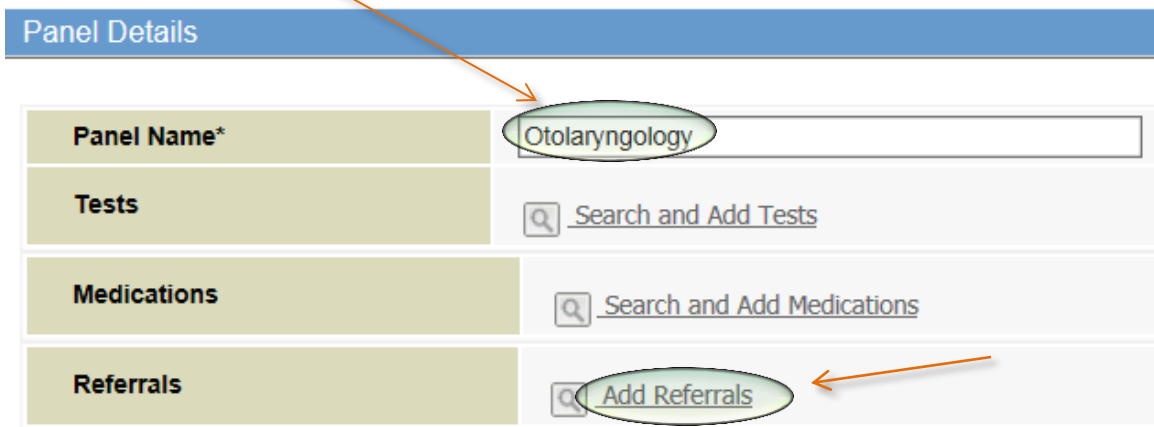
Practice Specific Panel Setup

	Panel Name	Date Created	Employee	Delete
+	CARDIOLOGY/CHEST PAIN	08/01/2013	barbara buckley	
+	NEUROLOGY	08/06/2013	Mary Trasmonte	
+	DERMATOLOGY	08/09/2013	Mary Trasmonte	
+	BARB CARDIO	08/19/2013	barbara buckley	
+	BREAST SURGEON	08/30/2013	barbara buckley	
+	RHEUMATOLOGY	11/15/2013	barbara buckley	
+	SURGEON REFERRAL	11/25/2013	barbara buckley	
+	MIGRAINE	02/10/2014	barbara buckley	



Add Panel

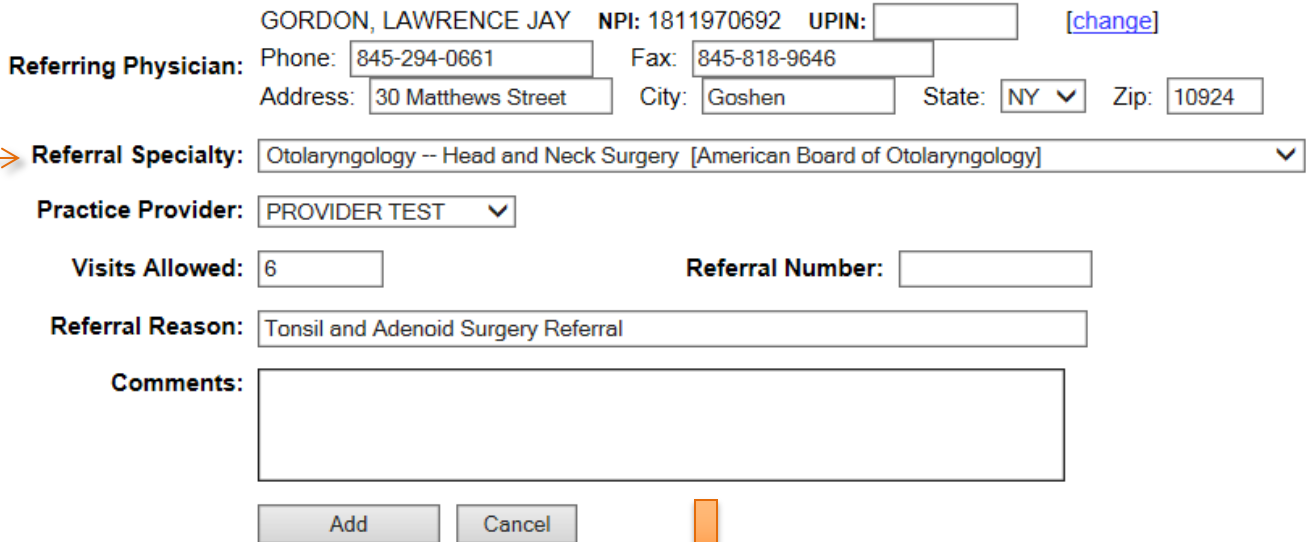
- Select a Panel **Name** and then select '**Add Referrals**'



Panel Details

Panel Name*	Otolaryngology
Tests	Search and Add Tests
Medications	Search and Add Medications
Referrals	Add Referrals

- Add a specific referring physician's name **and/or** Specialty:



Referring Physician: GORDON, LAWRENCE JAY NPI: 1811970692 UPIN: [\[change\]](#)
 Phone: 845-294-0661 Fax: 845-818-9646
 Address: 30 Matthews Street City: Goshen State: NY Zip: 10924

Referral Specialty: Otolaryngology -- Head and Neck Surgery [American Board of Otolaryngology]

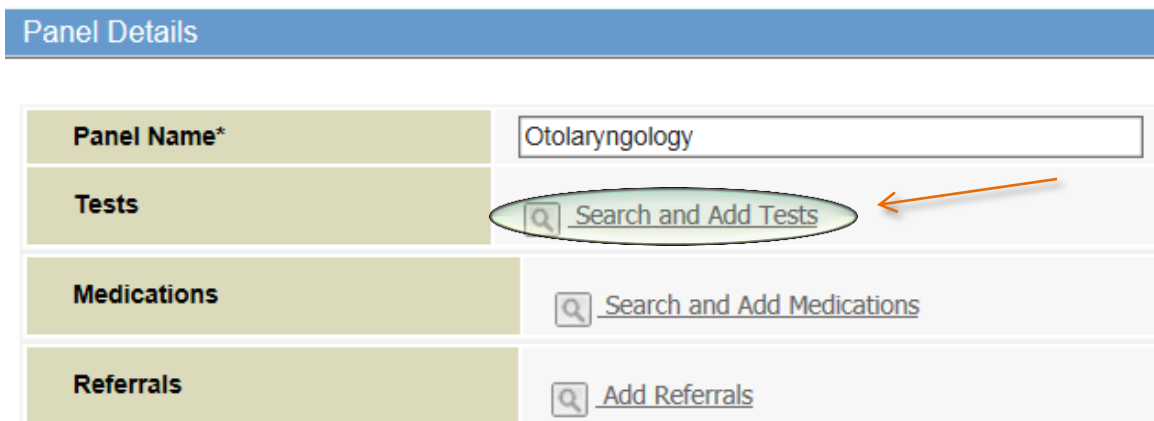
Practice Provider: PROVIDER TEST

Visits Allowed: 6 **Referral Number:**

Referral Reason: Tonsil and Adenoid Surgery Referral

Comments:

- Add specific tests or CPT codes to the referral:



Panel Details

Panel Name*	Otolaryngology
Tests	Search and Add Tests
Medications	Search and Add Medications
Referrals	Add Referrals

- Search the desired code and add to the list:

Code: Description:

Search Results

<input type="checkbox"/>	Test	Code
<input checked="" type="checkbox"/>	OFFICE OR OTHER OUTPATIENT VISIT FOR THE EVALUATION AND MANAGEMENT OF AN ESTABLISHED PATIENT, WHICH ...	99214

- Medications can also be added to the panel:

List of tests included in the panel

CPT Code	CPT Description
99214	OFFICE OR OTHER OUTPATIENT VISIT FOR THE EVALUATION AND MANAGEMENT OF AN ESTABLISHED PATIENT, WHICH ...
R0076	TRANSPORTATION OF PORTABLE EKG TO FACILITY OR LOCATION, PER PATIENT

List of prescriptions included in the panel

Prescription	Sig	Quantity
Nitro 0.2 mg/hr transdermal patch, 24 hour	Apply 1 patch(s) by transdermal route , 1 time per day , for 1 days	

List of referrals included in the panel

Physician	Speciality	Visits Allowed
	CardiologyAmerican Board of Internal Medicine	2

- Save your panel when completed:

4

Add to CPT Superbill: Once you have set up the outgoing referral you can add this to the superbill by going to **Administration>EMR Setup>CPT Superbill:**

Administration

Resource Management Patient Merge Practice Setup Scheduler Setup EMR Setup **Billing Setup**

SET Allergy Setup Note Misc. Note DoubleCheck HPI Templates Superbill Categories **CPT Superbill**

Condition Management Surgery History Management Note Display Templates Surgical Procedures Asse

- Scroll down to the “**Referral**” Category* and select ‘**Add Item**’.

Source Management Patient Merge Practice Setup Scheduler Setup EMR Setup Billing Setup Order Tracking Setup Medication Setup System Settings Logs			
T Allergy Setup Note Misc. Note DoubleCheck HPI Templates Superbill Categories CPT Superbill ICD Superbill Template Clone Tool Referral Note Setup Vital Sign Management Upload Category Management Medical			
dition Management Surgery History Management Note Display Templates Surgical Procedures Assessment Status Management Drawing Library Supervising Providers			
SHAVING OF EPIDERMAL OR DERMAL LESION, S		SHAVING OF EPIDERMAL OR DERMAL LESION, SINGLE LESION, TRUNK, ARMS OR LEGS; LESIO...	11302
SHAVING OF EPIDERMAL OR DERMAL LESION, S		SHAVING OF EPIDERMAL OR DERMAL LESION, SINGLE LESION, TRUNK, ARMS OR LEGS; LESIO...	11303
SPIROMETRY, INCLUDING GRAPHIC RECORD, TO		SPIROMETRY, INCLUDING GRAPHIC RECORD, TOTAL AND TIMED VITAL CAPACITY, EXPIRATORY ...	94010
Referrals			
Barb Cardio	Barb Cardio		OR1283
Breast Surgeon	Breast Surgeon		OR1351
Cardiology/Chest Pain	Cardiology/Chest Pain		OR1224
Cardiology/Chest Pain	Cardiology/Chest Pain		OR1224

- Enter the **Item Name** of the referral you had created under order set – In this example ‘**Otolaryngology**’. It will then be made available in the drop down list.
- You can then leave the default description, or elaborate upon it.
- Then ‘**Save**’ your new Referral.

Superbill Item Details

Category*	Referrals
Item Name*	Otolaryngology
Description	Otolaryngology Specialist Referral
	B I U
CPT Code*	OR1734
Default ICD Code	<input type="text"/> Use ? for search

Save Cancel

Note:

- The **Code** generate automatically is an Internal WRS created code – for accurate population with the CPT generated module.

Referrals		Add Item
Barb Cardio	Barb Cardio	OR1283
Breast Surgeon	Breast Surgeon	OR1351
Cardiology/Chest Pain	Cardiology/Chest Pain	OR1224
Cardiology/Chest Pain	Cardiology/Chest Pain	OR1224
Dermatology Referral	Dermatology Referral	OR1773
Endocrinology Referral	Endocrinology Referral	OR1766
migraine	migraine	OR1720
Otolaryngology	Otolaryngology Specialist Referral	OR1734
PSYCHIATRIC DIAGNOSTIC EVALUATION	PSYCHIATRIC DIAGNOSTIC EVALUATION	90791
Psychiatry Referral	Psychiatry Referral	OR1771
Rheumatology	Rheumatology	OR1541
Surgeon Referral	Surgeon Referral	OR1576

- The new **Referral** will be added to the Referral category in the **CPT Superbill**.

5 Referral Now Visible in EMR Note:

Cass Test
58 year old female,
DOB: Feb 2, 1956

Clinical Date 📅
Oct 9, 2013 to Oct 9, 2013

View Note
Patient Instructions
View All Notes
Templates

Visit Note II ▼

ALL NOTES
CURRENT NOTE
HPI & ROS
Histories & Habits
Physical Exam
Medications
Assessment & Plan
Orders & Procedures

- Once you have set up the outgoing referral in the superbill you can now use the referral in your note. Referrals will be seen under **EMR Note>Orders & Procedures**:

Referrals			
<input type="checkbox"/> [OR1283] Barb Cardio	<input type="checkbox"/> [OR1351] Breast Surgeon	<input type="checkbox"/> [OR1224] Cardiology/Chest Pain	<input type="checkbox"/> [OR1224] Cardiology/Chest Pain
<input type="checkbox"/> [OR1773] Dermatology Referral	<input type="checkbox"/> [OR1766] Endocrinology Referral	<input type="checkbox"/> [OR1720] migraine	<input type="checkbox"/> [OR1734] Otolaryngology

- Select your desired outgoing referral > Then **add as an order**>then select **Continue**.

ADD ORDERS/PROCEDURES

Add As Procedures(s)
Add As Order(s)


OTOLARYNGOLOGY

CPT Code	CPT Description
99214	OFFICE OR OTHER OUTPATIENT VISIT FOR THE EVALUATION AND MANAGEMENT OF AN ESTABLISHED PATIENT, WHICH REQUIRES AT LEAST 2 OF THESE 3 KEY COMPONENTS: A DETAILED HISTORY; A DETAILED EXAMINATION; MEDICAL DECISION MAKING OF MODERATE COMPLEXITY. COUNSELING AND/OR COORDINATION OF CARE WITH OTHER PHYSICIANS, OTHER QUALIFIED HEALTH CARE PROFESSIONALS, OR AGENCIES ARE PROVIDED CONSISTENT WITH THE NATURE OF THE PROBLEM(S) AND THE PATIENT'S AND/OR FAMILY'S NEEDS. USUALLY, THE PRESENTING PROBLEM(S) ARE OF MODERATE TO HIGH SEVERITY. TYPICALLY, 25 MINUTES ARE SPENT FACE-TO-FACE WITH THE PATIENT AND/OR FAMILY.

Physician	Specialty	Visits
LAWRENCE JAY GORDON	Otolaryngology -- Head and Neck Surgery American Board of Otolaryngology	6

Continue
Cancel

- The referral will then show under 'Ordered Tests'.

Ordered Test	Code/Order	Comments	Diagnosis	Ordered on	Action
[Panel:Otolaryngology (OR1734)] OFFICE OR OTHER OUTPATIENT VISIT F ...	99214/19117565		[252.01] primary hyperparathyro ... Type ICD Code / Problem to search	03/24/2014	  
<div> Save Print All Order(s) </div>					

- The test can also be printed out and handed to the patient.

Test, Cass
DOB: 02/02/1956
Female

Date: Oct 9, 2013
Order No 19117565
Note No 14102965
Printed 11:36 AM Mar 24 2014

WRS Implementation and Training
123 Maple St., Goshen, NY 10924-1245
Tel: (866)888-8888 Fax: (845)360-2362
Doctor TestDoc, PhD, MD, LIC.
#55555555555555555555 (AK)

Order

Test: [99214] [Panel:Otolaryngology(OR1734)] OFFICE OR OTHER OUTPATIENT VISIT FOR THE EVALUATION AND MANAGEMENT OF AN ESTABLISHED PATIENT, WHICH REQUIRES AT LEAST 2 OF THESE 3 KEY COMPONENTS: A DETAILED HISTORY; A DETAILED EXAMINATION; MEDICAL DECISION MAKING OF MODERATE COMPLEXITY. COUNSELING AND/OR COORDINATION OF CARE WITH OTHER PHYSICIANS, OTHER QUALIFIED HEALTH CARE PROFESSIONALS, OR AGENCIES ARE PROVIDED CONSISTENT WITH THE NATURE OF THE PROBLEM(S) AND THE PATIENT'S AND/OR FAMILY'S NEEDS. USUALLY, THE PRESENTING PROBLEM(S) ARE OF MODERATE TO HIGH SEVERITY. TYPICALLY, 25 MINUTES ARE SPENT FACE-TO-FACE WITH THE PATIENT AND/OR FAMILY.

CPT: OFFICE OR OTHER OUTPATIENT VISIT FOR THE EVALUATION AND MANAGEMENT OF AN ESTABLISHED PATIENT, WHICH REQUIRES AT LEAST 2 OF THESE 3 KEY COMPONENTS: A DETAILED HISTORY; A DETAILED EXAMINATION; MEDICAL DECISION MAKING OF MODERATE COMPLEXITY. COUNSELING AND/OR COORDINATION OF CARE WITH OTHER PHYSICIANS, OTHER QUALIFIED HEALTH CARE PROFESSIONALS, OR AGENCIES ARE PROVIDED CONSISTENT WITH THE NATURE OF THE PROBLEM(S) AND THE PATIENT'S AND/OR FAMILY'S NEEDS. USUALLY, THE PRESENTING PROBLEM(S) ARE OF MODERATE TO HIGH SEVERITY. TYPICALLY, 25 MINUTES ARE SPENT FACE-TO-FACE WITH THE PATIENT AND/OR FAMILY.

Diagnosis: [252.01]

Signature: _____



Tracking an Outgoing Referral: Once the outgoing referral is created the referral can then be tracked:

- In the **Patient Management>Referrals tab:**

Manage Patients Patient Registration Patient Search Demographic Reports

Welcome, Cassandra (3) Lock Screen Sign Out

Providers Directives Account Information Appointment Search Referrals Authorizations Comments Printout

Personal Information Insurance Contact Information Medical History Medications Pharmacies Social History

Incoming Referrals for CASS TEST

Outgoing Referrals for CASS TEST

EMR All Notes Continuity of Care Record

VALID OUTGOING REFERRALS

Edit	Doctor/Specialty Info	Valid From	Valid Until	Visits Allowed	Referral Number	Comments
Edit	Doctor: GORDON, JAY LAWRENCE; NPI: 1811970692 Specialty: Otolaryngology -- Head and Neck Surgery [American Board of Otolaryngology]	03/24/14		6		Comments

AND

Ordered Tests with Pending Results

Patient Name	Test	Code	Order Comments	Ordered by	Ordered On	Expected On	View Notes	Order History	Education & Instructions	Print	Delete
TEST, CASS	[Panel: Otolaryngology (OR1734)] OFFICE OR OTHER OUTPATIENT VISIT FOR TH ...	99214		Cassandra Lamboy	03/24/2014						

Enter Results
Upload Reports
Close Test
Add to Task
View/Add Diagnosis
Further Action
Add Expected DOC

- In the **Order Tracking System:**
- Where you can 'right click' and **upload**/populate the returned **report** from the **referenced provider**/specialist.



***Adding a Category to Superbill:** If you do not already have a 'Referral' category in your superbill go to **Administration>EMR Setup>Superbill Categories:**

Administration Resource Management Patient Merge Practice Setup Scheduler Setup EMR Setup Billing Setup
SET Allergy Setup Note Misc. Note DoubleCheck HPI Templates Superbill Categories CPT Superbill
Condition Management Surgery History Management Note Display Templates Surgical Procedures

- Then **Add New Group**

Musculoskeletal & Connective Tissue	ICD
Nervous System & Sense Organ Disorders	ICD
Respiratory System	ICD
Skin, Subcutaneous Tissue	ICD

Add New Group

- Then type in the **Category Name > Category Type** (ICD or CPT – In this case CPT) > Then **Save**.

Superbill Category Details

Category Name*:	REFERRALS
Type*:	CPT ▼

Save Cancel

- This will then be added to the **CPT Superbill** Category list.