

Referrals

The referral template can be accessed from multiple sites in SETMA's NextGen application including:

- AAA Home
- All Disease Management Tools Plan Templates
- PDM Plan Template
- Others

The screenshot displays the SETMA's NextGen application interface. At the top left is the logo for Southeast Texas Medical Associates, L.P. The patient information section includes fields for Patient (RichmondPROI), Ztest, Sex (M), Age (35), DOB (05/23/1974), Home Phone, and Work Phone. Below this is a 'Patient's Code Status' field. A large menu of navigation links is provided, including 'SETMA's LESS Initiative', 'Preventing Diabetes', 'Preventing Hypertension', 'Medical Home Coordination', 'Charge Posting Tutorial', 'ICD-9 Code Tutorial', 'E&M Coding Recommendations', 'Needs Attention!!', 'Master GP', 'Nursing Home', 'Ophthalmology', 'Pediatrics', 'Physical Therapy', 'Podiatry', 'Rheumatology', 'Daily Progress', 'Admission Orders', 'Discharge', 'Insulin Infusion', 'Colorectal Surgery', 'Pain Management', 'Exercise', 'CHF Exercise', 'Diabetic Exercise', 'Drug Interactions', 'Smoking Cessation', 'Hydration', 'Nutrition', 'Guidelines', 'Lab Future', 'Lab Results', 'Disease Management', 'Acute Coronary Syn', 'Angina', 'Asthma', 'CHF', 'Diabetes', 'Headaches', 'Hypertension', 'Lipids', 'Cardiometabolic Risk Syndrome', 'Weight Management', 'Renal Failure', and 'Diabetes Edu'. On the left, there are fields for 'Patient's Pharmacy', 'Phone', and 'Fax', along with buttons for 'Rx Sheet - Active', 'Rx Sheet - New', 'Rx Sheet - Complete', and 'Home Health'. The central 'Pending Referrals' table is highlighted with a red border and contains one entry: Status: Completed, Priority: Routine, Referral: Test, Referring Provider: Abbas. Below it is an 'Archived Referrals' section with a 'Referral History' link. On the right, there is a 'Chart Note' section with buttons for 'Return Info', 'Return Doc', 'Email', 'Telephone', 'Records Request', and 'Transfer of Care Doc'.

The Referral Template is opened by either:

1. Double clicking in the Referral window
2. Right clicking in the Referral window and clicking on "Add New."

Note: When the "Referral Template" is accessed the following fields are automatically completed: date, time, referring provider and status of referral. If after completing one referral, a second referral is completed by clicking on the "clear to add" button, the "Auto fill" button must be launched in order to complete those fields.

The key to successfully using the Referral template is to make sure that you complete:

1. The reason for the referral

- a. It is very helpful if you specify a diagnosis or condition or question which motivated the referral.
- b. If the referral is for a procedure or study, that must be indicated by checking the box by the appropriate study or procedure.
- c. Only one referral can be made each time.
- d. If a second or third referral is being made in the same encounter, the referral template must be closed (see below) and the "Add New" button clicked to add the second referral, or the "clear to add" button must be clicked once the first referral has been e- mailed and then the "Auto fill" button must be clicked. (see below)

2. To whom, or for what the referral is being made.

cp_referrals_pop - [New Record]

* Indicates procedures done in-house.

Referrals Template

Patient: Ztest DOB: Phone:

Acute Diagnoses

Chronic Conditions

Special Procedures

- * Arterial Blood Gases
- Audiogram
- * Bladder Scan
- * Bone Density
- Breast Biopsy (Stereo)
- Bronchoscopy
- * Colonoscopy
- EEG
- EGD
- * EMG
- ENG
- Eye Exam
- Flex Sigmoidoscopy
- HDA Scan
- IVP
- Liver Biopsy
- Mammogram
- Mod. Barium Swallow
- * Nerve Conduction Vel.
- * PFT
- Renal Scan
- * Segmental Pressures
- * Thoracentesis
- Thyroid Biopsy
- Thyroid Scan
- Sleep Studies - Altus
- UGI
- UGI w/Small Bowel Series
- V/Q Lung Scan

Ultrasound/Sonogram

- * Abdominal US
- * Arterial Doppler Lower Extremity
- Breast US
- * Carotid Doppler
- * Gallbladder US
- Pelvic with Probe
- * Renal US
- * Renal Artery US
- * Small Parts (Testicular, Thyroid)
- * Venous Doppler, Lower Extremity
- * MRA
- * MRI
- * CT
- With Dye
- Bone Scan

Therapy

- Physical Therapy
- Speech Therapy
- Occupational Therapy
- Medical Nutrition Therapy (Michelle A. Satchfield, RD, LD)

Medical Home

- Care Coordinator
- Financial
- Home Health
- Hospice
- Social Work

Cardiac Procedures

- Adenosine Cardiolite
- * CPET
- Dobutamine Echo
- * Echocardiogram
- * Holter Monitor
- Stress Echo
- * Stress Test
- Stress Thallium
- Ambulatory BP Monitoring

Common Referrals

- Beaumont Bone and Joint
- Dermatology - Dr. Vaughn
- ENT - Dr. Duplan
- General Surgery - Dr. Gonzales
- Healy Urologic Clinic
- Nephrology - Dr. Derderian
- Orthopedics - Dr. Marrero
- Podiatry - Dr. Carmack
- Southeast Texas Cardiology
- Southeast Texas Gastroenterology

SETMA Referrals

- Allergy
- CHF
- Coumadin
- Diabetes Educ
- Endocrinology
- Neurology
- Ophthalmology
- Rheumatology

Indication

Routine Immediate Stat

E-mail
E-Mail Incomplete

Auto-Fill
Ins Info
Blue Cross Blue Shield
(800)451-0267
449313467

Date	Time	Specialty	Referring Provider	Referred To	In Progress
20091130	10:06 AM		James L. Holly MD		<input type="checkbox"/>

Reason:

Report:

REF
MR

<< < Clear for Add Delete Save Close > >>

The second column has the following elements:

- Special Procedures

"cp_referrals_pop" - [New Record]

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Referrals Template

Patient: Candace Test DOB: 03/23/2009 Phone: (409)776-5309

Acute Diagnoses

Chronic Conditions

Auto-Fill

Ins Info

Special Procedures

- * Arterial Blood Gases
- Audiogram
- * Bladder Scan
- * Bone Density
- Breast Biopsy (Stereo)
- Bronchoscopy
- * Colonoscopy
- EEG
- EGD
- * EMG
- ENG
- Eye Exam
- Flex Sigmoidoscopy
- HIDA Scan
- IVP
- Liver Biopsy
- Mammogram
- Mod. Barium Swallow
- * Nerve Conduction Vel.
- * PFT
- Renal Scan
- * Segmental Pressures
- * Thoracentesis
- Thyroid Biopsy
- Thyroid Scan
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- UGI
- UGI w/Small Bowel Series
- V/Q Lung Scan

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- Breast U/S
- * Carotid Doppler
- * Gallbladder U/S
- Pelvic with Probe
- * Renal U/S
- * Renal Artery U/S
- * Small Parts (Testicular, Thyroid)
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- * MRI
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Medical Home

- Care Coordinator
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- Hospice
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Routine Immediate Stat

Indication

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- Adenosine Cardiolite
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Common Referrals

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- Dermatology - Dr. Vaughn
- ENT - Dr. Duplan
- General Surgery - Dr. Gonzales
- Healy Urologic Clinic
- Nephrology - Dr. Derderian
- Orthopedics - Dr. Marrero
- Podiatry - Dr. Carmack
- Southeast Texas Cardiology
- Southeast Texas Gastroenterology

SETMA Referrals

- Allergy
- CHF
- Coumadin
- Diabetes Educ
- Endocrinology
- Neurology
- Ophthalmology
- Rheumatology

E-mail

E-Mail Incomplete

Date	Time	Specialty	Referring Provider	Referred To

Reason: _____

Report: _____

Notes: _____

REF
 MR

The fourth column has the following elements:

1. Cardiac Procedures
2. Common Referrals – this is a list of providers and/or provider groups to whom SETMA commonly makes referrals.
3. SETMA Referrals - this is a list of all internal providers available for patient referrals

cp_referrals_pop - [New Record]

* Indicates procedures done in-house.

Referrals Template

Patient: Ztest DOB: Phone:

Date	Time	Specialty	Referring Provider	Referred To	In Progress
20091130	10:18 AM		James L. Holly MD		<input type="checkbox"/>

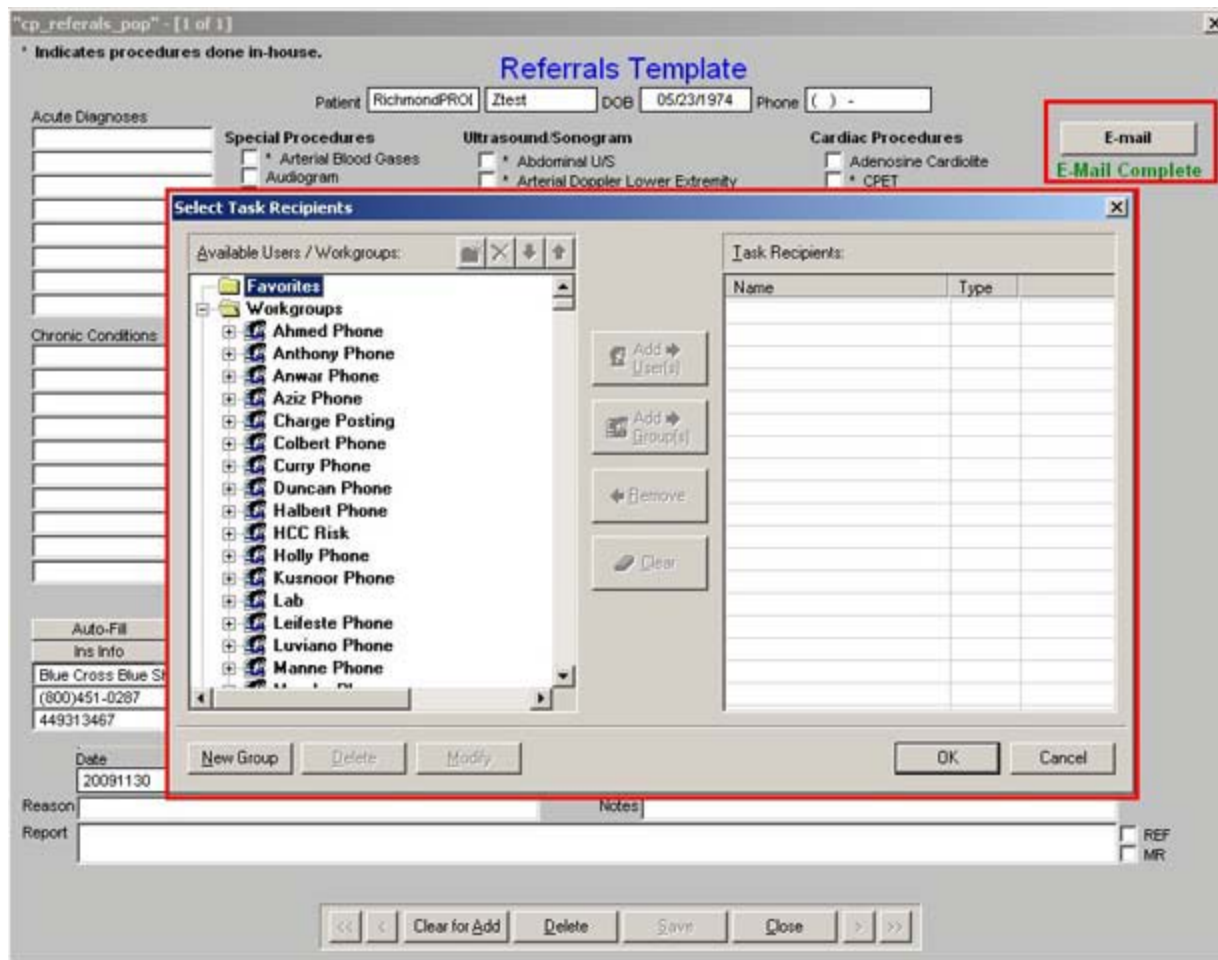
Reason: _____
 Report: _____

REF
MR

The fifth column has a single element:

1. E-mail – this is the function which sends the referral to the referral department.
 - a. When the e-mail button is activated, a pop-up appears which gives several options for attachments.
 - b. The choice of "this template" should be checked and then "OK" button should be clicked.
 - c. When the e-mail window appears, it is possible to add additional information if needed for the benefit of the referral department and/or for the one to whom the referral is being made.
 - d. Once any additional information is added to the message space on this e-mail, the "send" button should be activated.
 - e. The referral has now being completed.

2. When the e-mail is executed the word "completed" will indicate that the referral has been successfully sent to the referral department.



The bottom section has the following boxes:

1. **Date** – this is the date the template was completed and is automatically generated.
2. **Time** – this is the time the template was completed and is automatically generated.
3. **Specialty** – this is the type of consultant to whom you are referring the patient and must be completed by the provider.
4. **Referring Provider** – this is the name of the provider making the referral and is automatically completed.
5. **Referred to** -- this is the name of the physician to whom the patient is being referred and must be completed by the provider.
6. **Progress** – this is the status of the referral and is automatically completed.
7. **Reason** – this is the reason for the referral and must be completed by the provider.
8. **Notes** – this is a place for any special instructions to the physician to whom the patient is being referred and must be completed by the provider.
9. **Report** – this is a box where any reports or other special materials can be entered by the referring provider.

