

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, PLLC. The patient information section includes fields for Patient (Test Dummy), Sex (M), Age (48), and DOB (04/01/1957). Below this are fields for Home Phone and Work Phone. A navigation menu contains links for SETMA's LESS Initiative, Preventing Diabetes, Preventing Hypertension, Drug Interactions, and Charge Posting Tutorial. A second row of links includes Master GP, Nursing Home, Ophthalmology, Pediatrics, Physical Therapy, and Rheumatology. A third row includes Admission Orders, Discharge, Insulin Infusion, Colorectal Surgery, and Pain Management. A fourth row includes Depression, Exercise, CHF Exercise, Diabetic Exercise, Guidelines, Hydration, Lab Future, Lab Results, and Nutrition. A 'Disease Management' section lists links for Acute Coronary Syn, Angina, Asthma, CHF, Diabetes, Headaches, Hypertension, Lipids, Metabolic Syndrome, Weight, Renal Failure, and Diabetes Edu. The 'Referrals' section is highlighted with a red box and contains a table with the following structure:

Status	Priority	Referral	Referring Provider

Below the table are navigation arrows. To the right of the table is a vertical stack of buttons: Chart Note, Return Info, Return Doc, Email, Telephone, and Records Request. On the left side, there are fields for Patient's Pharmacy, Phone, and Fax, along with buttons for Rx Sheet - All and Rx Sheet - New.

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

The screenshot shows a software window titled "cp_referrals_pop" - [New Record]. The main area is titled "Referrals" and contains several columns of checkboxes for different medical procedures:

- Special Procedures:** * Arterial Blood Gases, Audiogram, * Bone Density, Breast Biopsy (Stereo), Bronchoscopy, * Colonoscopy, EEG, EGD, EMG, ENG, Eye Exam, Flex Sigmoidoscopy, HIDA Scan, IVP, Liver Biopsy, Mammogram, Mod. Barium Swallow, * PFT, Renal Scan, * Segmental Pressures, * Thoracentesis, Thyroid Scan, Sleep Studies.
- Ultrasound/Sonogram:** UGI, UGI with Small Bowel Series, V/Q Lung Scan, * Abdominal U/S, * Arterial Doppler Lower Extremity, Breast U/S, * Carotid Doppler, * Gallbladder U/S, Pelvic with Probe, * Renal U/S, * Renal Artery U/S, * Small Parts (Testicular, Thyroid), * Venous Doppler, Lower Extremity, * MRA, * MRI, * CT, With Dye, Nuclear, Bone Scan.
- 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, Colorectal Surgical Associates, Healy Urologic Clinic, Southeast Texas Cardiology, Southeast Texas Gastroenterology.
- SETMA Referrals:** CHF, Coumadin, Gen Surgery, Nephrology, Ophthalmology, Podiatry, Pulmonology, Rheumatology, Diabetes Educ.

Below the checkboxes are radio buttons for "Routine", "In-house", and "Stat", and a text field for "Indication". At the bottom, there is a table with columns for "Date", "Time", "Specialty", "Referring Provider", "Referred To", and "Completed". The "Reason" field is highlighted with a red box. At the very bottom, there are navigation buttons: "<<", "<", "Clear for Add", "Delete", "Save", "Close", ">", and ">>".

- It is very helpful if you specify a diagnosis or condition or question which motivated the referral.
- If the referral is for a procedure or study, that must be indicated by checking the box by the appropriate study or procedure.
- Only one referral can be made each time.
- 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]

Patient Name:

Referrals

Acute Dx:

Chronic Dx:

Special Procedures

- * Arterial Blood Gases
- Audiogram
- * Bone Density
- Breast Biopsy (Stereo)
- Bronchoscopy
- * Colonoscopy
- EEG
- EGD
- BMG
- ENG
- Eye Exam
- Flex Sigmoidoscopy
- HIDA Scan
- IVP
- Liver Biopsy
- Mammogram
- Mod. Barium Swallow
- * PFT
- Renal Scan
- * Segmental Pressures
- * Thoracentesis
- Thyroid Scan
- Sleep Studies

Ultrasound/Sonogram

- UGI
- UGI with Small Bowel Series
- V/Q Lung Scan
- * Abdominal U/S
- * Arterial Doppler Lower Extremity
- Breast U/S
- * Carotid Doppler
- * Gallbladder U/S
- Pelvic with Probe
- * Renal U/S
- * Renal Artery U/S
- * Small Parts (Testicular, Thyroid)
- * Venous Doppler, Lower Extremity
- * MRA
- * MRI
- * CT
- With Dye
- Nuclear Bone Scan

Cardiac Procedures

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

Common Referrals

- Beaumont Bone and Joint
- Colorectal Surgical Associates
- Healy Urologic Clinic
- Southeast Texas Cardiology
- Southeast Texas Gastroenterology

SETMA Referrals

- CHF
- Coumadin
- Gen Surgery
- Nephrology
- Ophthalmology
- Podiatry
- Pulmonology
- Rheumatology
- Diabetes Educ

Therapy

- Physical Therapy
- Speech Therapy
- Occupational Therapy
- Michelle A. Satchfield, RD, LD

Indication: Routine Expedite Stat

* Indicates procedures done in-house.

Date	Time	Specialty	Referring Provider	Referred To	Completed
20050714	3:10 PM		Accounts Collection		In Progress

Reason: _____

Report: _____

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

4. The e-mail function of sending the referral to the referral department.

The screenshot shows a software window titled "cp_referrals_pop" - [New Record]. The main area is titled "Referrals" and contains several sections of checkboxes for medical procedures. On the right side, there is a section for "Cardiac Procedures" and "SETMA Referrals". A red box highlights an "E-mail" button, and a red text label "E-Mail Incomplete" is placed below it. Below the procedure sections, there are radio buttons for "Routine", "Intermediate", and "Stat", and a text field for "Indication". At the bottom, there is a table with columns: Date, Time, Specialty, Referring Provider, Referred To, and Completed. The "Date" field contains "20050714" and "Time" contains "3:10 PM". Below the table are "Reason" and "Report" fields. At the very bottom, there is a toolbar with buttons: "<<", "<", "Clear for Add", "Delete", "Save", "Close", ">", ">>".

The Referral Template is divided into two sections from top to bottom with a tool bar at the very bottom of the template.

This is an identical screenshot to the one above, but with a red border around the entire window content. The "E-mail" button and "E-Mail Incomplete" text are still highlighted.

The top section has five columns.

The first column has the following elements:

1. **Patient Name** – this is automatically completed.
2. **Acute Diagnoses** – this information pulls from the present encounter
3. **Chronic Diagnoses** – this information pulls from the present encounter
4. **Auto-fill** – this button is used for second or subsequent referrals in the same encounter if the "clear to add" button is used to execute the subsequent referrals.
5. **Note:** * Indicates procedures done in house

cp_referrals_pop - [New Record]

Patient Name: Test Dummy

Referrals

Acute Dx

Chronic Dx

Special Procedures

- * Arterial Blood Gases
- Audiogram
- * Bone Density
- Breast Biopsy (Stereo)
- Bronchoscopy
- * Colonoscopy
- EEG
- EGD
- BMG
- BNP
- Eye Exam
- Flex Sigmoidoscopy
- HIDA Scan
- IVP
- Liver Biopsy
- Mammogram
- Mod. Barium Swallow
- * PFT
- Renal Scan
- * Segmental Pressures
- * Thoracentesis
- Thyroid Scan
- Sleep Studies

Ultrasound/Sonogram

- UGI
- UGI with Small Bowel Series
- V/Q Lung Scan
- * Abdominal U/S
- * Arterial Doppler Lower Extremity
- Breast U/S
- * Carotid Doppler
- * Gallbladder U/S
- Pelvic with Probe
- * Renal U/S
- * Renal Artery U/S
- * Small Parts (Testicular, Thyroid)
- * Venous Doppler, Lower Extremity
- * MRA
- * MRI
- * CT
- With Dye
- Nuclear Bone Scan

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
- Colorectal Surgical Associates
- Healy Urologic Clinic
- Southeast Texas Cardiology
- Southeast Texas Gastroenterology

SETMA Referrals

- CHF
- Coumadin
- Gen Surgery
- Nephrology
- Ophthalmology
- Podiatry
- Pulmonology
- Rheumatology
- Diabetes Educ

* Indicates procedures done in-house.

Routine Expedite Stat

Indication

Date	Time	Specialty	Referring Provider	Referred To	Completed
20050714	3:10 PM		Accounts Collection		In Progress

Reason

Report

Clear for Add Delete Save Close

The second column has the following elements:

- Special Procedures

cp_referrals_pop - [New Record]

Patient Name: Test Dummy

Referrals

Special Procedures

- * Arterial Blood Gases
- Audiogram
- * Bone Density
- Breast Biopsy (Stereo)
- Bronchoscopy
- * Colonoscopy
- EEG
- EGD
- BMG
- ENG
- Eye Exam
- Flex Sigmoidoscopy
- HIDA Scan
- IVP
- Liver Biopsy
- Mammogram
- Mod. Barium Swallow
- * PFT
- Renal Scan
- * Segmental Pressures
- * Thoracentesis
- Thyroid Scan
- Sleep Studies

Ultrasound/Sonogram

- UGI
- UGI with Small Bowel Series
- V/Q Lung Scan
- * Abdominal U/S
- * Arterial Doppler Lower Extremity
- Breast U/S
- * Carotid Doppler
- * Gallbladder U/S
- Pelvic with Probe
- * Renal U/S
- * Renal Artery U/S
- * Small Parts (Testicular, Thyroid)
- * Venous Doppler, Lower Extremity
- * MRA
- * MRI
- * CT
- With Dye
- Nuclear Bone Scan

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
- Colorectal Surgical Associates
- Healy Urologic Clinic
- Southeast Texas Cardiology
- Southeast Texas Gastroenterology

SETMA Referrals

- CHF
- Coumadin
- Gen Surgery
- Nephrology
- Ophthalmology
- Podiatry
- Pulmonology
- Rheumatology
- Diabetes Educ

Cardiac Procedures E-mail **E-Mail Incomplete**

* Indicates procedures done in-house.

Routine Expedite Stat

Indication

Date	Time	Specialty	Referring Provider	Referred To	Completed
20050714	3:10 PM		Accounts Collection		In Progress

Reason

Report

Auto-Fill

Clear for Add Delete Save Close

The third column has the following elements:

1. Ultrasound Sonogram
2. Therapy
3. Level of Referral: Routine, Immediate, Stat – this must be completed by the provider
4. Indication – this is a box where the reason for the referral can be documented by the referring provider.

cp_referrals_pop" - [New Record]

Patient Name: Test Dummy

Referrals

UGI
 UGI with Small Bowel Series
 V/Q Lung Scan

Ultrasound/Sonogram

* Abdominal U/S
 * Arterial Doppler Lower Extremity
 Breast U/S
 * Carotid Doppler
 * Gallbladder U/S
 Pelvic with Probe
 * Renal U/S
 * Renal Artery U/S
 * Small Parts (Testicular, Thyroid)
 * Venous Doppler, Lower Extremity
 * MRA
 * MRI
 * CT
 With Dye

Nuclear Bone Scan

Therapy

Physical Therapy
 Speech Therapy
 Occupational Therapy
 Michelle A. Satchfield, RD, LD

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
 Colorectal Surgical Associates
 Healy Urologic Clinic
 Southeast Texas Cardiology
 Southeast Texas Gastroenterology

SETMA Referrals

CHF Rheumatology
 Coumadin Diabetes Educ
 Gen Surgery
 Nephrology
 Ophthalmology
 Podiatry
 Pulmonology

* Indicates procedures done in-house.

Routine Immediate Stat

Indication

Date: 20050714 Time: 3:10 PM Specialty: Referring Provider: Accounts Collection Referred To: Completed: In Progress

Reason: Notes:

Report:

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

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]

Patient Name: Test Dummy

Referrals

Acute Dx:

Chronic Dx:

- Addison's Disease 255.
- Amputation Leg Below K
- Diabetes Mellitus Manif T

Special Procedures

- * Arterial Blood Gases
- Audiogram
- * Bone Density
- Breast Biopsy (Stereo)
- Bronchoscopy
- * Colonoscopy
- EEO
- EGD
- EMG
- ENG
- Eye Exam
- Flex Sigmoidoscopy
- HIDA Scan
- IVP
- Liver Biopsy
- Mammogram
- Mod. Barium Swallow
- * PFT
- Renal Scan
- * Segmental Pressures
- * Thoracentesis
- Thyroid Scan
- Sleep Studies

Ultrasound/Sonogram

- UGI
- UGI with Small Bowel Series
- V/Q Lung Scan
- * Abdominal U/S
- * Arterial Doppler Lower Extremity
- Breast U/S
- * Carotid Doppler
- * Gallbladder U/S
- Pelvic with Probe
- * Renal U/S
- * Renal Artery U/S
- * Small Parts (Testicular, Thyroid)
- * Venous Doppler, Lower Extremity
- * MRA
- * MRI
- * CT
- With Dye
- Nuclear Bone Scan

Therapy

- Physical Therapy
- Speech Therapy
- Occupational Therapy
- Michelle A. Satchfield, RD, LD

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
- Colorectal Surgical Associates
- Healy Urologic Clinic
- Southeast Texas Cardiology
- Southeast Texas Gastroenterology

SETMA Referrals

- CHF
- Coumadin
- Gen Surgery
- Nephrology
- Ophthalmology
- Podiatry
- Pulmonology
- Rheumatology
- Diabetes Educ

E-mail E-Mail Incomplete

* Indicates procedures done in-house. Routine Incomplete Stat

Date	Time	Specialty	Referring Provider	Referred To	Completed
20050714	3:10 PM		Accounts Collection		In Progress

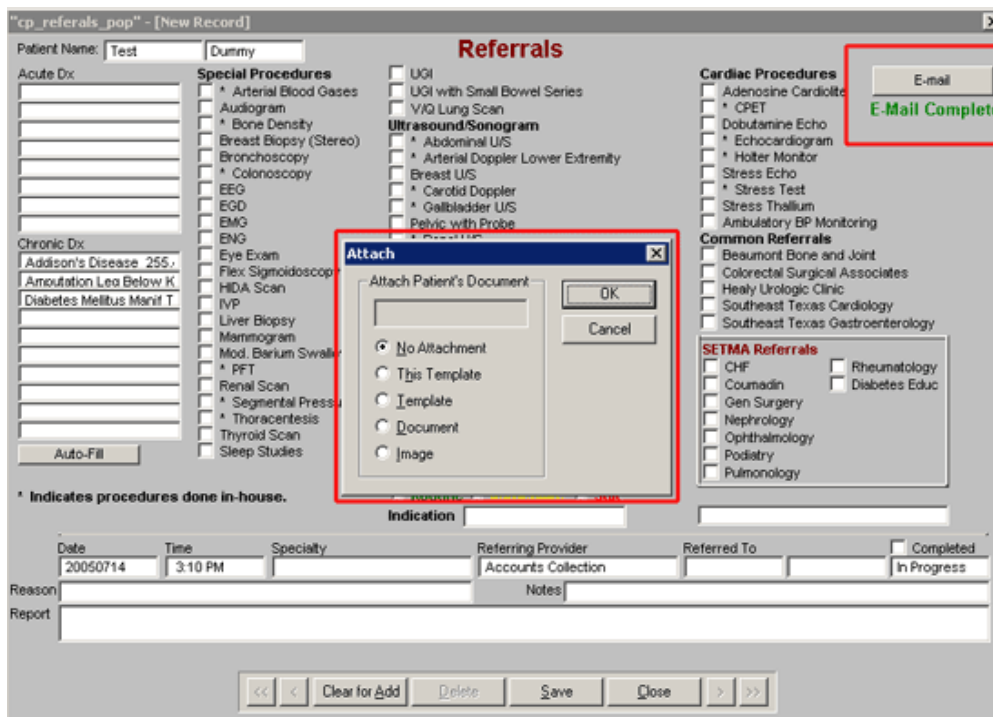
Reason: _____

Report: _____

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

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.

The screenshot shows a software window titled "cp_referrals_pop" - [New Record]. The main area is a form for entering referral information. It includes several columns of checkboxes for different types of procedures: "Special Procedures", "Ultrasound/Sonogram", "Cardiac Procedures", "Common Referrals", and "SETMA Referrals". There are also radio buttons for "Routine", "Expedite", and "Stat" under the "Indication" section. At the bottom of the window, a red-bordered box highlights a summary table with the following data:

Date	Time	Specialty	Referring Provider	Referred To	Completed
20050714	3:10 PM		Accounts Collection		In Progress

Below the table are two text boxes labeled "Reason" and "Report". At the very bottom of the window, there is a row of navigation buttons: "<<", "<", "Clear for Add", "Delete", "Save", "Close", ">", ">>".

At the very bottom, there is a tool bar with the functions:

1. **Clear to Add** – once a referral has been completed and e-mailed, this function can be used to complete another referral. If the second or subsequent referral is completed in this manner, the "Auto Fill" button at the bottom of the first column (see above) must be clicked. This will add the Date, Time, Referring Provider and Progress to the second or subsequent referral.
2. **Delete** – this will eliminate the referral if a mistake has been made.
3. **Close** – this will close the referral window.

The screenshot shows a software window titled "cp_referrals_pop" - [New Record]. The window is divided into several sections for selecting medical procedures:

- Acute Dx:** A list of empty text boxes for acute diagnoses.
- Chronic Dx:** A list of text boxes containing "Addison's Disease 255.", "Amputation Lea Below K", and "Diabetes Mellitus Manif T".
- Special Procedures:** A list of checkboxes including "Arterial Blood Gases", "Audiogram", "Bone Density", "Breast Biopsy (Stereo)", "Bronchoscopy", "Colonoscopy", "EEG", "EGD", "EMG", "ENG", "Eye Exam", "Flex Sigmoidoscopy", "HIDA Scan", "IVP", "Liver Biopsy", "Mammogram", "Mod. Barium Swallow", "PFT", "Renal Scan", "Segmental Pressures", "Thoracentesis", "Thyroid Scan", and "Sleep Studies".
- Ultrasound/Sonogram:** A list of checkboxes including "UGI", "UGI with Small Bowel Series", "V/Q Lung Scan", "Abdominal U/S", "Arterial Doppler Lower Extremity", "Breast U/S", "Carotid Doppler", "Gallbladder U/S", "Pelvic with Probe", "Renal U/S", "Renal Artery U/S", "Small Parts (Testicular, Thyroid)", "Venous Doppler, Lower Extremity", "MRA", "MRI", "CT", and "With Dye".
- Cardiac Procedures:** A list of checkboxes including "Adenosine Cardiolite", "CPET", "Dobutamine Echo", "Echocardiogram", "Holter Monitor", "Stress Echo", "Stress Test", "Stress Thallium", and "Ambulatory BP Monitoring".
- Common Referrals:** A list of checkboxes including "Beaumont Bone and Joint", "Colorectal Surgical Associates", "Healy Urologic Clinic", "Southeast Texas Cardiology", and "Southeast Texas Gastroenterology".
- SETMA Referrals:** A list of checkboxes including "CHF", "Coumadin", "Gen Surgery", "Nephrology", "Ophthalmology", "Podiatry", "Pulmonology", "Rheumatology", and "Diabetes Educ".

At the bottom of the window, there is a toolbar with the following buttons: "<<", "<", "Clear for Add", "Delete", "Save", "Close", ">", and ">>". The "Clear for Add" button is highlighted with a red box.