This document explains how to send referrals using eClinicalWorks® P2P®. Referrals can be sent from a number of locations from within eClinicalWorks, such as the Referrals window in the patient workflow, or directly from the P2P referral option under the T jelly bean.

**Outgoing Referrals**

To send an outgoing referral:

1. From the T jelly bean, select *Send eCW Referral/Consult*:

   ![Referral (Outgoing) window](image)

   The Referral (Outgoing) window opens, and the logged-in user's name displays in the *Ref From* field:

   ![Referral window](image)
2. In the Refer To section, click the More (…) button to open the Referring Physician Lookup page.

The results list may also be filtered by specialty by using the Specialty drop-down list prior to searching by provider name.

The Referring Physician Lookup window opens, with two tabs displayed: All Providers and Preferred Providers by Facility:

All P2P providers and non-P2P providers are listed on the All Providers tab.

The green P icon indicate that the providers have the ability to exchange data via eClinicalWorks P2P.

3. Use the search tool on the eCW P2P Providers tab to locate the provider who will receive the referral, then use the radio button to select the provider.

The selected provider is added to the Refer To field on the Outgoing Referral window:
4. Complete the referral details as usual, and click the *Attachments* button to include any attachments, such as the Continuity of Care (CCR/CCD) record if needed:

The CCR/CCD record contains the patient’s up-to-date medical summary information in a discrete C-32 format, which will allow the receiving provider to import the patient’s data directly into their documentation. This record can only be sent from the eClinicalWorks application through eCW P2P.

A new feature added in the attachments window is the space indicator, which displays the file size of the documents being sent. Currently the file size limit is 2MB.

5. For each type of attachment to add, click *Attach*.

   The corresponding Lookup or list window opens.

   a. Select the document.

   b. Click *OK*.

   The Attachments button displays the total number of documents that have been added to the referral.

6. When the referral details are complete, click *Send Referral*. 
OUTGOING REFERAALS

If the selected Referring To provider is a P2P provider, the Send Referral window opens. The system determines the best method of sending the referral (e.g., electronically through the P2P network. Click Send:

Send Referral

![Send Referral Window]

This referral is ready to be sent electronically.

Send Reminder fax box

Check the Send Reminder fax box and enter the fax number to send a general reminder to the receiver.

If the selected Referring To provider is not a P2P provider, the system automatically opens the Fax Preview window. Enter the necessary fields and click Send.

The fax cover letter displays a message requesting the user to Join the Network so that records can be sent electronically going forward:

![Fax Preview Window]

Join the Network

Instantly connect with thousands of medical professionals and care providers and securely send and receive clinical information to further coordination of care.

![Join the Network Sign-up]

Signature Clear Update