

# eClinicalWorks

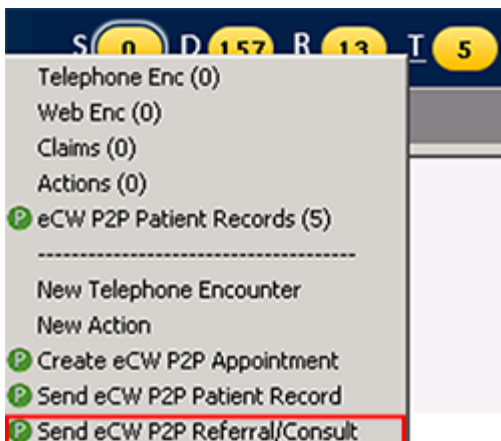
## SENDING REFERRALS USING P2P

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.

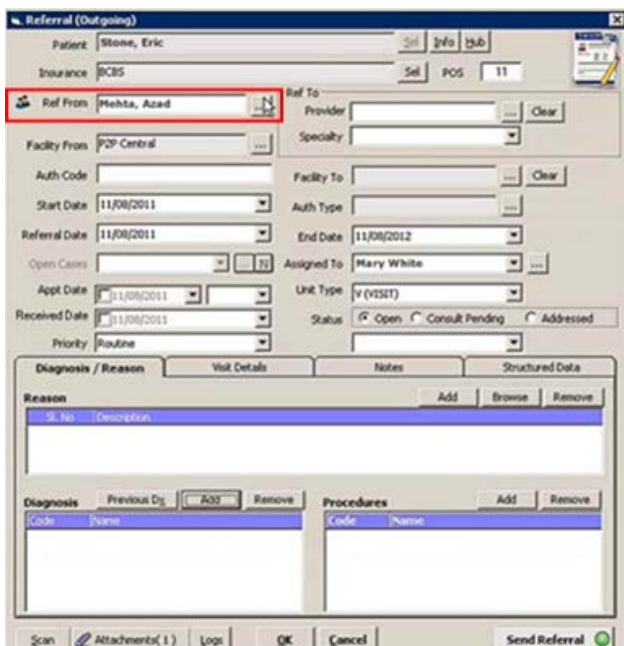
### Outgoing Referrals

To send an outgoing referral:

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



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

A screenshot of the 'Referral (Outgoing)' window in eClinicalWorks. The window contains various fields for patient information, insurance, and referral details. The 'Ref From' field is highlighted with a red rectangular box and contains the text 'Mehta, Azad'. Other fields include 'Ref To', 'Facility From', 'Auth Code', 'Start Date', 'Referral Date', 'Open Cases', 'Appt Date', 'Received Date', 'Priority', 'Diagnosis / Reason', 'Notes', and 'Structured Data'. The window also has buttons for 'Scan', 'Attachments (1)', 'Logs', 'OK', 'Cancel', and 'Send Referral'.

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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:

| Name                                      | Address                        | Specialty         | Contact Details              | Aff |
|---|--------------------------------|-------------------|------------------------------|-----|
| <input type="radio"/> Applegate, Kourtney |                                | Family Practice   | 13123123123                  |     |
| <input type="radio"/> Bart, Star          | 101 Main St, Waltham MA 02453  |                   | 617-442-2932<br>384-938-3943 |     |
| <input type="radio"/> Camilleri, Ricardo  |                                | Cardiac Surgery   |                              |     |
| <input type="radio"/> Horgan, Joseph      | 603 N Flamingo Rd, Suite 35... | Internal Medicine |                              |     |
| <input type="radio"/> Jones, Mike         |                                |                   |                              |     |
| <input type="radio"/> MacDonald, Old      | Westborough MA 01581           | Rheumatology      |                              |     |
| <input type="radio"/> McGovern, Charles   | 112 Turnpike Road Westboro ... | Pediatrics        |                              |     |
| <input type="radio"/> Provider 1, p2p     |                                |                   |                              |     |
| <input type="radio"/> Pugh, Nicolas       |                                |                   |                              |     |
| <input type="radio"/> S, Adam             |                                |                   |                              |     |

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

The green P icon indicates 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:

Referral (Outgoing)

Patient: Stone, Eric [Sel] [Info] [Hub]

Insurance: BCBS [Sel] POS: 11

Ref From: Mehta, Azad [...]

Facility From: P2P Central [...]

Auth Code: [ ]

Ref To: Provider: Mary O'Neil [Clear] Specialty: [ ]

Facility To: [ ] [Clear]

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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 screenshot shows the 'Attachments' window with the following details:

- Window title: Attachments
- Checked options:  Attach Medical Summary,  Attach CCR/CCD
- File size indicator: 50.81 KB / 2 MB
- Section: Progress Notes (Columns: Date, Reason; Buttons: Attach, Remove)
- Section: Lab Reports (Columns: Name, Reason, Result; Buttons: Attach, Remove)
- Section: X-Rays (Columns: Name, Reason, Result; Buttons: Attach, Remove)
- Section: Patient Documents (Columns: Name, Description; Buttons: Attach, Remove)
- Buttons: OK, Cancel

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.

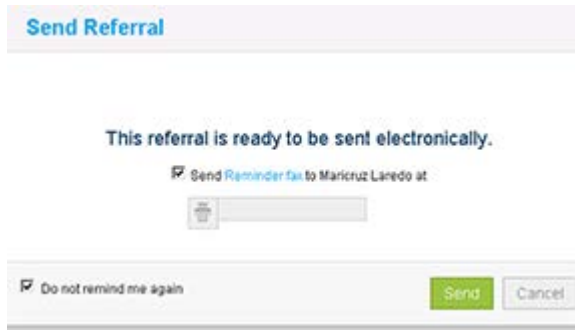
- a. Select the document.
- b. Click *OK*.

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*.

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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**

This referral is ready to be sent electronically.

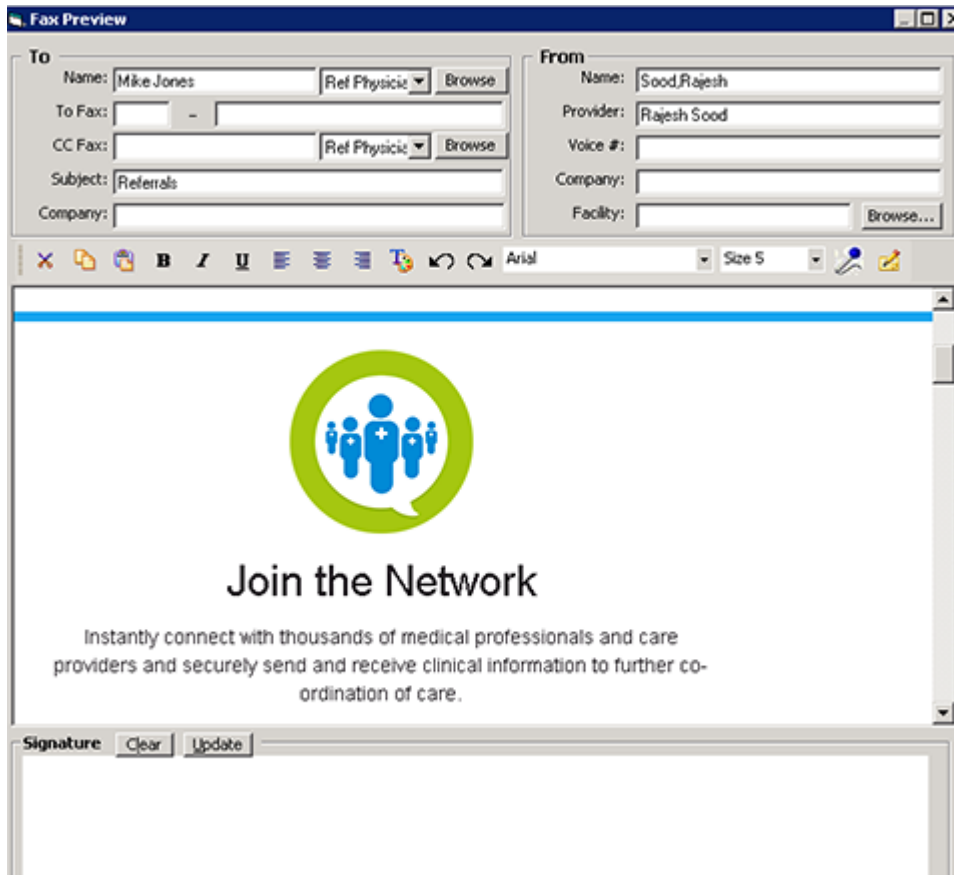
Send Reminder fax to Maricruz Laredo at

Do not remind me again

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**

**To**  
Name: Mike Jones Ref Physicist Browse  
To Fax: -  
CC Fax: Ref Physicist Browse  
Subject: Referrals  
Company:

**From**  
Name: Sood,Rajesh  
Provider: Rajesh Sood  
Voice #:  
Company:  
Facility: Browse...

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**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.

Signature Clear Update