Once the Referral From and Referral To providers are both setup with P2P, referral information can be sent and received electronically in eClinicalWorks.

**Sending P2P Referrals:**

From the Outgoing Referral window, verify both the Referral From and Referral To providers have the P2P symbols next to their names. Then attach any pertinent details to the referral before selecting “Send Electronically” at the bottom of the referral.
Receiving P2P Referrals:

Once a P2P Referral is received by the Referral To provider, the designated staff member will receive an email message confirming the referral (see setup instructions). The default staff member for incoming referrals will also receive a new incoming referral in their R jellybean. P2P referrals will have a “P” to the left of the referral name.

Double click the referral to view the details. Click “Create Referral”.

![Image of referral system interface]

[Referral System Interface Image]

- Nikki (Training) Test
  - Primary Insurance: Aetna
  - To: Jan L. Brandes
  - From: Lightford, Melvin
  - Referral Reason: Eval for headaches
  - Specialty: Neurology
  - Start Date: 04/24/2017
  - End Date: 04/24/2018
  - Attached Documents:
    - Progress Notes (1)
    - Labs (1)
    - Diagnostic Imaging (0)
    - Documents (0)
    - Medical Summary

[Create Referral Button] [Cancel Button]
The patient name will appear in red at the top of the screen since the account has not yet been matched. Click “Sel” to the right to search and select the matching account or create a new account.

If eClinicalWorks finds a potential match for the incoming referral, those details will appear in the Patient Lookup window. Click “Info” at the bottom of the window to review and verify the patient details. Otherwise click “Use Matched Patient” to use the selected account. Use “Match and Select” to search and match to a different account and “Register” to create a new patient account.
Click “Ok” to close the referral window. User will be prompted to download the attached documents.

Downloaded documents will automatically be saved in the Patient Documents area under the “eCW P2P Documents” folder. User can rename and move documents as needed. Documents will auto assign to the Referral to provider.

Once the patient has been scheduled for their visit, office staff can use the CCR option in the Progress Note view to import patient details. Click the DRTLA tab in the right side car and scroll down to referrals. From there click the “CCR” option next to the P2P referral.
Review and import patient details into the note by clicking the arrow. Data that can be imported from the Referral From provider’s eClinicalWorks database includes Problem List, Allergies, Medications, Social History, Family History, Immunizations, Medical History, Surgical History, Hospitalizations.

Reply to the referring provider by clicking the respond arrow to the left of the P2P referral.

Note: To send records to the Referral From provider via P2P, use the “eCW P2P Patient Records” option in the jellybean.