

## eClinicalWorks Training – Sending and Receiving P2P Referrals

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.

Referral (Outgoing)

Patient: Test, Nikki (Training) (46134) Sel Info Hub

Insurance: Aetna Sel Pt Ins POS 11

Ref From: Lightford, Melvin ... Ref To: Brandes, Jan ... Pref Clear

Facility From: Metro Center Healthcare Grou ... Specialty: Neurology

Auth Code: Facility To: Nashville Neuroscience Group ... Clear

Start Date: 04/24/2017 Auth Type: ...

Referral Date: 04/24/2017 End Date: 04/24/2018

Open Cases: ... Assigned To: Trusty, Nikki (TrainingALL) ...

Appt Date: 04/24/2017 Unit Type: V (VISIT)

Received Date: 04/24/2017 Status:  Open  Consult Pending  Addressed

Priority: Routine

**Diagnosis / Reason** Visit Details Notes Structured Data

**Reason** Add Browse Remove

Sl. No	Description
1	eval for headaches

**Diagnosis** Previous Dx Add Remove

Code	Name
G43.009	Migraine without aura and without status mi

**Procedures** Add Remove

Code	Name
------	------

Scan Attachments (3) Logs OK Cancel Send 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.

Referrals Incoming											
Open Addressed All All Open(Date Range)											
Assigned to All Date Between 04/24/2016 And 04/24/2017											
Referral From All Referral To All Facility From All											
AuthType Structured Item Go											
New View Referral											
RE	P	Date	Patient	Reason	Referral From	Referral To	Speciality	Start Date	End Date	Appt Date	Facility F
	P	04/24/2017	Test,Nikki (Training)	eval for headaches	Lightford,Melvin W	Brandes,Jan L		04/24/2017	04/24/2018		

Double click the referral to view the details. Click "Create Referral".

### Request Referral

**Nikki (Training) Test** 📞 02/01/1986 📞 615-341-0991  
Primary Insurance Aetna

To **Jan L Brandes** 📞 615-284-4680  
Appointment N/A

From **Lightford,Melvin**  
Metro Center Healthcare Group  
Neurology  
📞 615-254-9981 📞 615-254-9747

#### Referral

Reason **eval for headaches**

Visit Allowed **0**

Clinical Notes

📎 **Attached Documents** [view all](#)

- 📄 Progress Notes (1)
- 🧪 Labs (0)
- 📷 Diagnostic Imaging (0)
- 📄 Documents (0)
- 📄 Medical Summary

[Create Referral](#) [Cancel](#)

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.

Referral (Incoming)

Patient: **Test, Nikki (Training) (not matched)** Sel Info Hub

Insurance: \_\_\_\_\_ Sel Pt Ins POS 11

Ref From: Lightford, Melvin ... Ref To: Provider: Jan L Brandes ... Clear

Specialty: \_\_\_\_\_

Facility From: \_\_\_\_\_ Facility To: \_\_\_\_\_

Auth Code: \_\_\_\_\_

Start Date: 04/24/2017 Auth Type: \_\_\_\_\_

Referral Date: 04/24/2017 End Date: 04/24/2018

Open Cases: \_\_\_\_\_ Assigned To: \_\_\_\_\_

Appt Date: 04/24/2017 Unit Type: V (VISIT)

Received Date: 04/24/2017 Status:  Open  Consult Pending  Addressed

Priority: Routine

**Diagnosis / Reason** Visit Details Notes Structured Data

**Reason** Add Browse Remove

Sl. No	Description
1	eval for headaches

**Diagnosis** Previous Dx Add Remove

Code	Name

**Procedures** Add Remove

Code	Name

Scan Attachments (2) OK Cancel Print

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.

Patient Lookup

**Search Patient**  Include Appointment Facility New (Copy) New Delete

Test, Nikki (Training) by Name & by All by ... RTS

Pri	Wt	v/v	Name	DOB	Phone	Account No.	Last Appt Dt	Previous Name
1	!	w	Test, Nikki (Training)	02/01/1986	615-341-0991	46134	04/17/2017	Lindsay

**We found Test, Nikki (Training) in the system.**  
(matched using , DOB).

**Name:** Test, Nikki (Training)  
**DOB:** 02/01/1986  
**Gender:** Female  
**Phone:** 615-341-0991

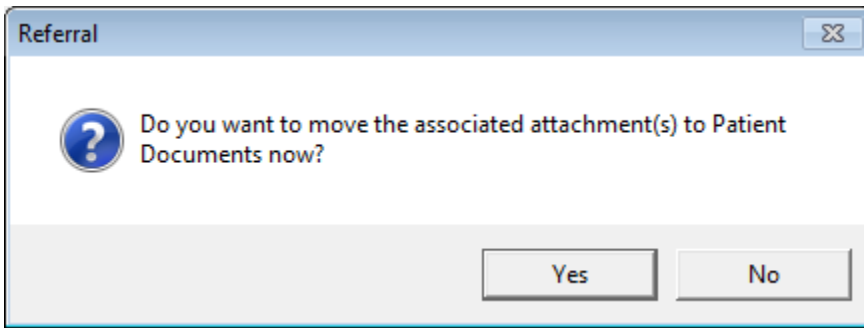
**(Patient already matched)**

Use Matched Patient  
Match and Select  
Register

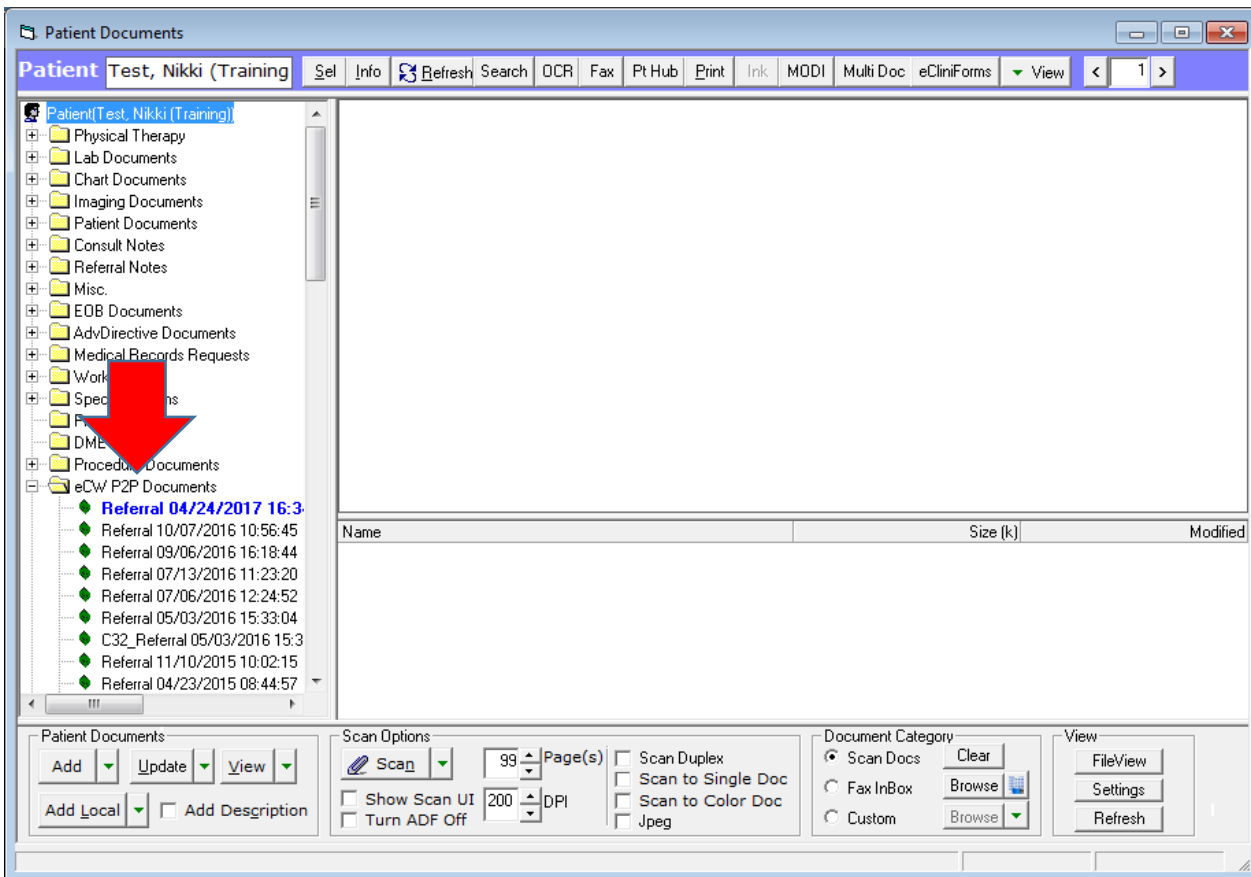
Reason for appointment

< Prev Next > Patient Info OK Cancel

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 DRTL 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.

CCR
✕

View

← Depo Medrol 40 mg	05/19/2016
← Depo Medrol 40 mg	05/19/2016
← Tdap	10/03/2016
← Afluria	11/08/2016
← Flu vaccine	07/10/2017
← FLUVIRIN IM .5ml	07/10/2017
← Ceftriaxone injection per 250mg	02/20/2017
← Dexamethasone injection, per 1mg	02/22/2017

▲ Medical History
←

- no significant medical history:
- arthritis: Yes
- blood disorder: Yes
- Cancer

▲ Surgical History
←

- appendectomy 01/1999
- 2/10/14 tubal ligation
- bladder sling
- c-section 1/15/2017
- r- knee 02/2013

▲ Hospitalization
←

- childbirth 10/24/2015

Close

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

Referrals

	eval for headaches	04/24/2017	O
↻	<span style="background-color: #90EE90; border-radius: 50%; padding: 2px;">P</span> eval for headaches	04/24/2017	I
↻	<span style="background-color: #90EE90; border-radius: 50%; padding: 2px;">P</span> eval for headaches <span style="font-size: small; color: red;">CCR</span>	04/24/2017	I

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