EpicEdge Tips & Tricks

Navigate Web-Based Referral Entry

Processing referrals in web-based workflows has a more modern look and improved features compared to non-web workflows. Familiarize yourself with this web-based Referral Entry to make your processing of referrals easier for you and more efficient for your system's patients. Your organization decides which Referral Entry sections are available in a given workflow, and you can ignore sections to which you don't have access while trying out the following steps.

Try It Out

1. In Hyperspace, open a referral you need to work. You can do so from referral/authorization workqueues, Appt Desk, and Referral Entry itself.
2. From the table of contents on the left side of the screen, go to the **General and Referred By/To** sections and review that they have the proper fields filled out per your organization's policies. To open a section for editing, either click the section from the table of contents or scroll to it and click on its title.
3. Continue your review of the referral, making updates as necessary. Refer to the list of common updates to make to a referral below for tips about using the various sections.
4. Review the table of contents. If you see any warning or required icons next to a section, that means there is recommended or required information in that section yet to be entered. Go to those sections, find the fields with the corresponding icons, and fill them out.
5. At any point during your workflow, you can click **Accept and Stay** to save your current changes and run automatic processing without closing the referral. Click this button now to let automatic processing run to make sure there are no further updates you need to make to the referral.
6. When you are done, save and close the referral:
    *   If you have the referral open in its own Referral Entry workspace tab, click the at the top of the tab to close the workspace, saving all open referrals in that workspace.
    *   If you have the referral open in a shared workspace, click **Accept** to save and close only your current referral.

A standard workflow in web-based Referral Entry

Common updates to make to a referral, which you can complete in any order:

- If you need to add diagnosis or service information, go to the **Diagnoses** and **Services** sections, respectively. For both sections you can add a specific code by clicking ➕ **Diagnosi**s or ➕ **Service**, respectively. Alternatively, you can simply add a free-text explanation by clicking ➕ **Free Text**.
- If you need to assign an appointment not scheduled in your system to the referral, go to the **Appointment List** section and click either ➕ **Add External Appointment** or ➕ **Add Manual Count**. To assign a scheduled appointment to the referral, use the Assign Referral feature in Appt Desk.
- Go to the **Communications** section. You can add a note or manually create another notification type by clicking the corresponding button at the top of this section and filling out the form.
- Go to the **Authorization** section. Verify that the referral has an appropriate number of counts.
- If you need to add service information for a specific coverage, from the **Authorization** section, click the name of the coverage. Your focus moves to the **Coverage Auth** section for that coverage, from which you can add service codes and count information specific to that coverage.
- Find the footer at the bottom of the screen. If you know that the referral needs an updated status, you can enter that value in the **Status** field at any time during your workflow.