

EpicEdge Tips & Tricks

Save Time Using the New Referral Entry Framework

Referral Entry has a new design, allowing you to review summaries of the information on a referral with only a scroll wheel (1). If you're working through many changes to a referral, you can also save mid-workflow to ensure your changes thus far aren't accidentally lost, all without having to close and re-open the referral you're working (2). If you're finished working on multiple referrals, you can click the X to close the activity and save all your referrals together.

The screenshot displays the 'Referral for Kubiak, James' interface. At the top, it shows the patient's name and insurance details (MC PAYOR / MC HMO PLAN). The main area is divided into several sections: 'General' (Referral # 202126500011, Type Consultation, Priority Routine, Class Outgoing), 'Referral Status' (Status Pending Review, Reason System Automatically Pend), 'Referred By/To' (Referred By MUDD, MARJORIE, Referred To KRUEGER, STEPHEN), 'Diagnoses' (I49.9 ICD-10-CM Arrhythmia), and 'Services' (9004 - CONSULT TO CARDIOLOGY - GENERAL, Provider STEPHEN KRUEGER). A scroll wheel is highlighted with a red circle and the number 1. At the bottom, there are buttons for 'Accept & Stay', 'Accept', and 'Cancel', with the 'Accept & Stay' button highlighted by a red circle and the number 2.