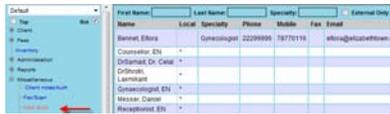
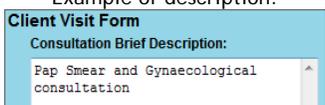
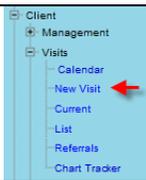
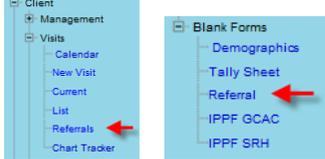
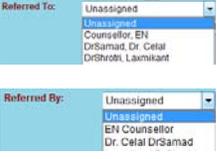
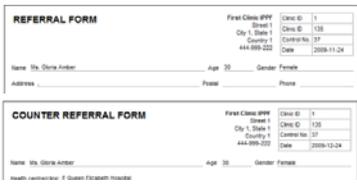


ROLES: COUNSELLOR / MEDICAL STAFF PROCESS 4.2.0: **MANAGING REFERRALS**

#	Step	Observations	Menu options or screen information
0	<p>Preliminary steps: In order to manage a Referral, you first need to have an active client, by creating a new client record or finding an existing one.</p> <p>While a Referral can be created <u>without</u> having an active visit (the client does not receive any service in your clinic other than being referred), it is common that the referral arises while receiving a counselling or medical service. In those cases an active visit is created as well.</p> <p>Open EMR Version 3.2.0.1 allow the creation and mapping of a new service type for referrals: REF</p>	<p>Referrals can be external or internal:</p> <p>An external referral occurs when a client is directed from an MA clinical service delivery point to one or more external (non MA) sources for clinical, social, or other service provision. This unit of measure is key for IPPF service statistics and has to be differentiated from internal referrals for IPPF Annual Reporting.</p> <p>On the other hand, Internal Referrals are transfers of clients between MA own service delivery points.</p>	<p>A list of external institutions and internal (MA) services areas/providers, which will be receiving patients from the clinic, should be registered. These people, areas or organizations should be entered previously in the Address Book, located under Miscellaneous in the Main Menu (see corresponding process guideline):</p> 
1	<p>Defining 'Consultation Brief Description' When you create/update the visit, the corresponding Form will allow the inclusion of a Consultation Brief Description (e.g. reason or visit, chief complaint, etc.) that will be reflected later in the referral form. At this point, however, it is likely that the referral has not been determined.</p>	<p>Example of description:</p>  <p>This reason of visit may be different from the one needed for referral</p>	
2	<p>Creating a Referral (and other transaction types)</p> <ul style="list-style-type: none"> • Add transaction: This link will open a digital Transaction Form to be filled out onscreen. Make sure the Transaction Type is set to: Referral. • Print a Blank Referral Form: Alternatively, you can print a Blank Referral Form (or have photocopies of it) in order to fill the referral form manually (if, for instance, a power failure or the lack of computer equipment or staff so requires) 		 <p>Referral control panel: Referrals and Other Transactions (Add Transaction) (Print Blank Referral Form)</p>
3	<p>Filling the Referral Form</p> <ul style="list-style-type: none"> • Referral Date: Date when referral is initiated • Referred To: provider/institution (in Address Book) • External Referral? Y/N: To a non-MA service point • Include Vital Signs: (Unassigned, Yes, No) • Requested Service: REF codes taken from popup table • Referred By: MA service provider prescribing the referral • Reason: Taken from Visit Form (visit reason) (editable) • Risk Level: (Unassigned, High, Medium, Low) • Expected Reply Date: When results from external service should be received in clinic for follow-up • Preliminary Diagnosis: Text filled by MA service provider 	 <ul style="list-style-type: none"> • Highlighted (red) fields are mandatory • In the example reason was changed (reason for referral different from reason of visit) • Requested service = is the statistic to be measured as outbound Referral made; e.g. IPPF Mammography code 	<p>Drop down menus for Referred to and by:</p>  <p>Note: Referral (REF) services are a short list of services to which the clinic usually refers their clients. Create and map these services with the Administration > Services option</p>
4	<p>Filling the Counter-Referral Form</p> <ul style="list-style-type: none"> • Reply Date: Actual date when data is received • Reply from: service provider or institution referring the client back to the MA clinic • Documents: sent by referral provider/institution that can be added to the EMR by uploading scanned images • Service Provided: REF Services the client received • Prescriptions/Referrals: recommended by referrer • Final Diagnosis: reached by the external provider • Findings: from the studies / analysis made • Recommendations: Open text field 	 <ul style="list-style-type: none"> • Counter-Referral form is filled when referred client data is sent back to your clinic • Service provided = is the statistic to be measured as verified Referral. These are essential components of the QoC approach 	 <p>Mark the Counter-Referral tick box to expand the form.</p> <p>Note: From OpenEMR version 3.2.0.1 onward, multiple services can be entered in both Requested Service & Service Provided fields. Use different Referral forms only if client is referred to more than one Referral institution</p>
5	<p>Saving the Referral and Printing Referral Form When you save the Referral, a Control panel will be displayed including:</p> <ul style="list-style-type: none"> • Add Transaction: To create a new referral • Print Blank Referral Form: To be filled manually • Referral Date: Reopens the Referral digital form • Referral: Prints the specific form in 3 parts: Referral form (clinic copy), Client copy, Counter-Referral form 		<p>[Save Transaction]</p> <p>Referral control panel: Referrals and Other Transactions (Add Transaction) (Print Blank Referral Form) Tue November 24th (admin) Referral Mammography</p> <p>Add transaction > New Form Print Blank Referral Form > blank paper form Date link > Digital Form Referral link > Client-related Paper Form</p>
6	<p>Filling additional referral forms in same visit It is possible to create several referral or counter-referral forms in the same visit. This feature allows the individual counting of external referrals and verified referrals, as required by IPPF.</p>	 <ul style="list-style-type: none"> • Requested service = IPPF Needle biopsy 	<p>Referrals and Other Transactions (Add Transaction) (Print Blank Referral Form) Tue November 24th (admin) Referral Fine needle aspiration cytology Tue November 24th (admin) Referral Mammography</p> <p>Note how individual Referral forms are recorded into the Referral Control Panel</p>