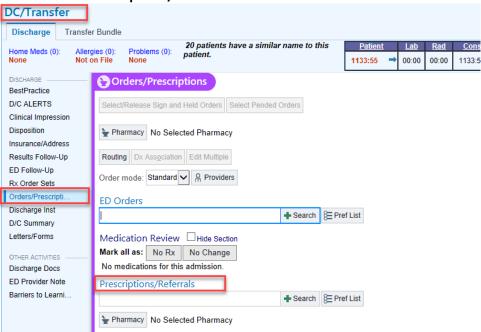# Mount Sinai Health System
Epic Tip Sheet

Creating a Referral from the ED Using Discharge Orders
Users Impacted: Emergency Department Providers after One Epic Go-Live

PURPOSE: This tip sheet provides the workflow in creating and sending a referral Order from the ED in Epic. Key components of the document call out future state changes to order nomenclature and provider finder usage and functionality.

1. ADD ORDER

   In the Discharge/Transfer activity, select the Orders/Prescriptions tab in the middle left hand side of the screen and scroll down to **Prescriptions/Referrals**.
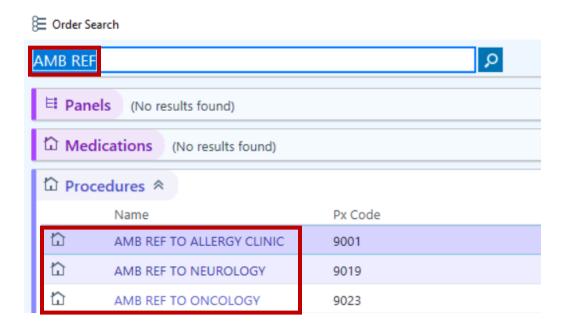

2. SEARCH AND SELECT THE ORDER

   Search for "AMB REF" in the **Search for new orders** field. You will see a list of referrals; the order search window will utilize the preference list to default to the most commonly referred to department specialties, locations and providers to select from. If you do not know the specific department or provider that the order should go, the provider can select the generic specialty order (e.g. "Amb Ref to *Orthopedics*") After selecting the correct one, click **Accept** at the bottom right. You can also use the words "consult" or "referral" to search for these.

   *Note: This referral nomenclature has changed from "Consult to" to "**AMB REF TO**" with One Epic.*
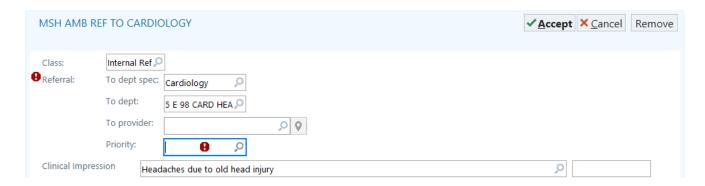
Mount Sinai Health System
Epic Tip Sheet

Order Search

AMB REF

Panels (No results found)

Medications (No results found)

Procedures ⌃

	Name	Px Code
⌂	AMB REF TO ALLERGY CLINIC	9001
⌂	AMB REF TO NEUROLOGY	9019
⌂	AMB REF TO ONCOLOGY	9023

3. COMPLETE ORDER DETAILS
   Fill in the fields to complete the referral.

MSH AMB REF TO CARDIOLOGY   ✓ Accept ✗ Cancel Remove

Class: Internal Ref 🔍
❗Referral: To dept spec: Cardiology 🔍
To dept: 5 E 98 CARD HEA 🔍
To provider: 🔍 📍
Priority: ❗ 🔍
Clinical Impression: Headaches due to old head injury 🔍

a. **Class**: By default, "internal referral" will populate in this field. This is a referral coming from a Mount Sinai doctor and the patient is being sent to see another Mount Sinai provider.

No changes to this field are necessary by the user – the Class will automatically update in the referral after a provider is selected in the "To Provider" field irrespective of that provider being internal or external.

Internal referral: Mount Sinai to Mount Sinai
Outgoing referral: Mount Sinai to External Provider

b. **To dept spec**: This will automatically populate department specialty based on the referral selected in the "Amb Ref To" Order Entry process. Refer to referral screenshot above.

c. **To Dept**: Selecting the "Referred To" department is the recommended option, as populating the To Dept field will get the patient to the right referring office most efficiently. This may automatically populate with the department location depending on what was selected off the order entry preference list. If an order with a defaulted department was selected off the Preference List, the referral will be routed directly to the targeted practice (location) to be worked and scheduled.

   If the provider utilizes the generic "Amb Ref" order (the order that does not specify a specific department location), the **To Dept** field will not automatically populate with a referred to department. Providers can search within the order to select a Mount Sinai location with that specialty.

   If the provider does not populate the T**o Dept** field in the order, the referral will first route to the BA workqueue for BA staff to enter a department/provider and route the referral to the receiving office for scheduling.
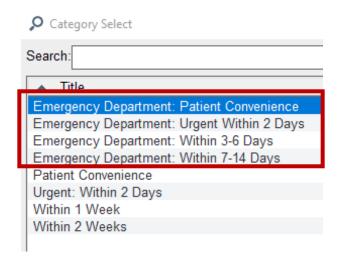
d. **To Provider**: This field should not be populated unless the patient is being sent to a specific provider within the department specialty indicated on the referral form. This field is not a required field in the order entry process and can be skipped if not needed.

   If a To Dept field is not populated, but the **To Provider** field is populated using provider finder, the referral will still route to the BA workqueue to fill out the department to route the referral to the receiving department for scheduling. The To Dept field is needed for the referral to route directly to the receiving office.

   In the event a patient already has a specialist they've seen previously and would like to continue going to that provider's office, the referring provider can enter the receiving provider's name into the "to Provider" field to send the patient appropriately.
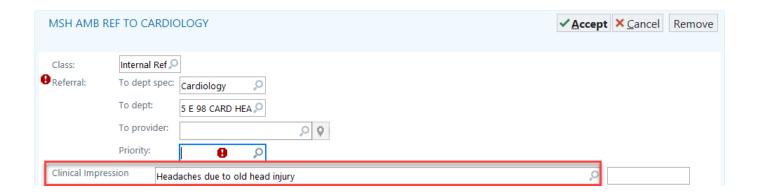
e. **Priority**: Select the appropriate priority for this referral. This is a required field in the entry process and must be selected. For ED referrals, only the top four priority reasons should be utilized.

After completing the details of the order select **Accept** at the bottom right.

4. CLINICAL IMPRESSION
Clinical Impression will automatically populate the order with what was stated as clinical impression in Epic.

5. SIGN THE ORDER
At the top right, click **Accept** then sign the order. Separate document emailed regarding updating smart sets and order sets if appropriate.