

## Process Guideline

1.3.2

## Managing referrals

All users | Administrative | Clinic

Page 1 of 2

OpenEMR version

4.1

Last update

May 28, 2017

Author(s): X Gonzalez

### Steps

### Menu

### Managing referrals / Images

## 1 Creating a referral

Once a visit is created and selected (Current), a Referral can be created from the Clinical forms dropdown menu

Filters help to locate codes

Internal referrals use MA codes

External referrals use REF codes

REQUESTED SERVICE SELECTION

- Referral Date: Select in calendar (usually today)
- Referral type: Outbound/Inbound | External/Internal
- Reason: Text box
- Include vital signs: Yes (if taken during visit)/No
- Requested service: Selected from appropriate list
- Referred by: person/institution who refers client
- Referred to: person/institution who receives client
- Risk level: Low, medium, high
- Expected reply date: Recommended date for follow-up
- Preliminary diagnosis: Presumptive Dx to guide

## 2 Programing a counter-referral

Selecting the Counter-referral checkbox opens the corresponding form for the active client.

Once the client returns the paper counter-referral form, these data can be entered in OpenEMR.

## 3 Printing referral forms

Paper forms are printed to formally manage the referral process:

**Clinic copy:** Is retained in the client's eHR file.

**Client copy:** Is given to client to inform her/his next steps in the referral process and the next provider's work.

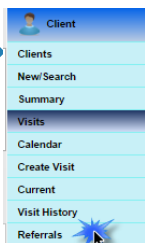
**Counter-referral form:** To be given to next provider in order to document Dx, findings, services provided and treatment plan properly. This form should be returned to the clinic either by provider or client.

Note: The visit page provides a list of Referrals available for individual editing, printing or deleting

Process Guideline	1.3. 2	Managing referrals	All users   Administrative   Clinic	Page 2 of 2
OpenEMR version	4.1	Last update	May 28, 2017	Author(s): X Gonzalez
Steps		Menu	Managing referrals / Images	

#### 4 Reviewing referral history

Referral history can be reviewed by selecting Referrals in the Visits menu



Abdullah, Fatimah

Delete

History | Report | Documents | Transactions | Referrals | Issues

Referrals for Current Client

All Types

-- All Facilities --

From: 0000-00-00

To: 2017-03-29

Refresh

Export to CSV

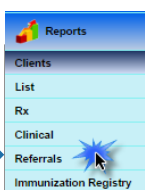
Print

Refer By	Refer To (Org / Person)	Refer Date	Expected Date	Reply Date	Client	ID	Reason	Service
Dr. Ernest Desir	/ EN Counsellor	29/03/2017	30/03/2017		Fatimah Abdullah	04122008ME001	Counseling required	GBV-020: GBV Counseling (individual)
Dr. Ernest Desir	/	29/03/2017	01/05/2017		Fatimah Abdullah	04122008ME001	Cauterization required	GYN-052: GYN - Cauterization
EN Gynaecologist	/ EN Counsellor	03/07/2016	30/03/2017		Fatimah Abdullah	04122008ME001	VBG Counseling - Family conflict	262293229: Counseling - Family Conflict
EN Gynaecologist	/ Private Physician	04/12/2008	04/06/2017	18/12/2008	Fatimah Abdullah	04122008ME001	MR	252001:
Total Referrals: 4 Services: 4								

Note: Refer date is a link to open the corresponding Referral)

#### 5 Printing a referral report

Client referral history can also be printed by selecting Reports / Clients / Referrals



Print Cancel

Destination Nitro PDF Creator (Pro 1..

Change...

Pages

All

e.g. 1-5, 8, 11-13

#### Referrals for Current Client

All Types	-- All Facilities --	From: 0000-00-00	To:					
2017-03-29	Refresh	Export to CSV	Print					
Refer By	Refer To (Org / Person)	Refer Date	Expected Date	Reply Date	Client	ID	Reason	Service
Dr. Ernest Desir	/ EN Counsellor	29/03/2017	30/03/2017	31/03/2017	Fatimah Abdullah	04122008ME001	Counseling required	GBV-020: GBV Counseling (individual)
Dr. Ernest Desir	/	29/03/2017	01/05/2017		Fatimah Abdullah	04122008ME001	Cauterization required	GYN-052: GYN - Cauterization
EN Gynaecologist	/ EN Counsellor	03/07/2016	30/03/2017		Fatimah Abdullah	04122008ME001	VBG Counseling - Family conflict	262293229: Counseling - Family Conflict
EN Gynaecologist	/ Private Physician	04/12/2008	04/06/2017	18/12/2008	Fatimah Abdullah	04122008ME001	MR	252001:
Total Referrals: 4 Services: 4								

Purpose	To manage internal and external referrals, either outbound or inbound
Process description	When a service cannot be provided in the clinic, an <b>outbound external referral</b> is required. When an additional service available in the organization is required, clients are referred to other staff or facilities within the organization through an <b>outbound internal referral</b> . Receiving ( <b>inbound</b> ) <b>internal</b> or <b>external referral</b> can be also recorded in OpenEMR.
Pre-conditions	To create a referral, a client record must be active (client name is displayed at the top of the OpenEMR screen), a visit open, and a referral form completed.
Observations	The referral process involves creating a referral, scheduling (and following-up) a counter-referral, printing referral forms, and consulting referral history and reports.