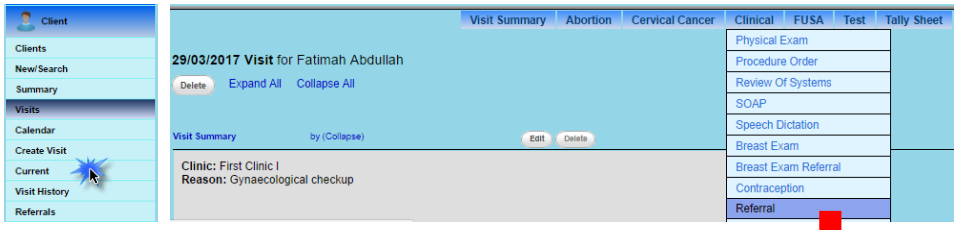
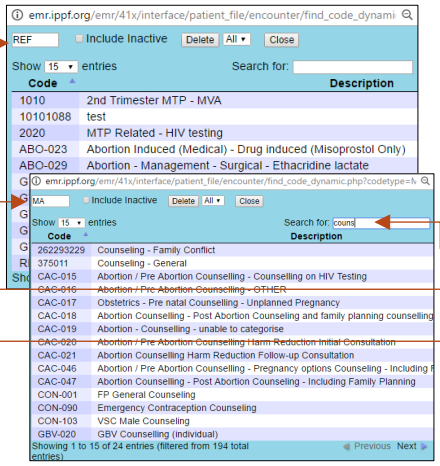
Process Guideline	1.3.2	Managing referrals	All users| Administrative | Clinic
OpenEMR version	4.1	Last update	May 28, 2017

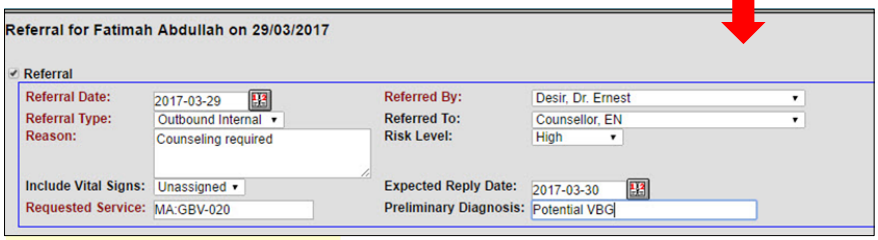
Steps	Menu	Managing referrals / Images

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

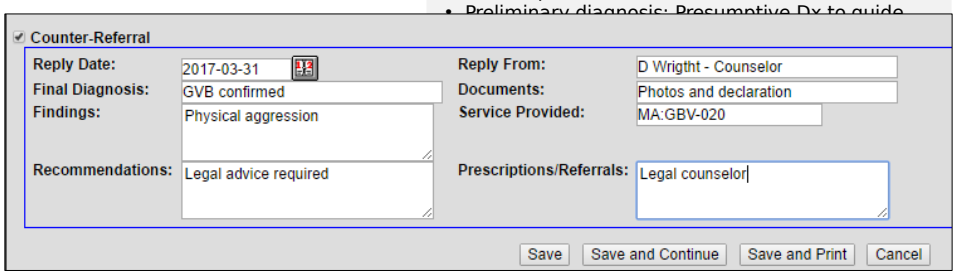
REQUESTED SERVICE SELECTION

- 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.



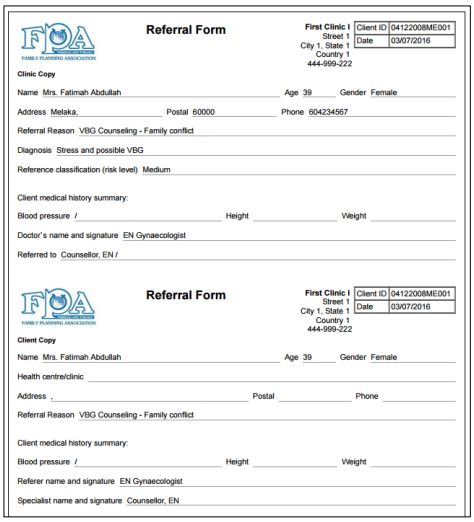
3 Printing referral forms

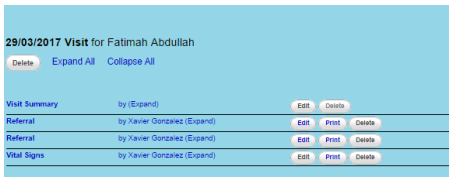
Paper forms are printed to formally manage the referral process:

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

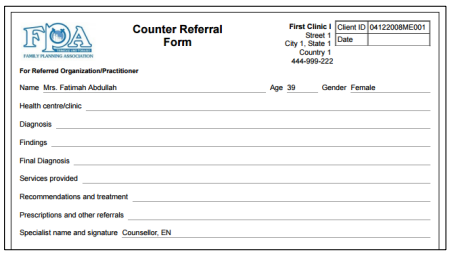
Client copy: Is given to client to inform her/his next steps in the referral process and the next provider's work.

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.





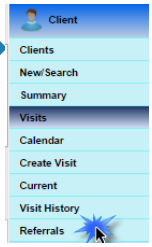
Note: The visit page provides a list of Referrals available for individual editing, printing or deleting

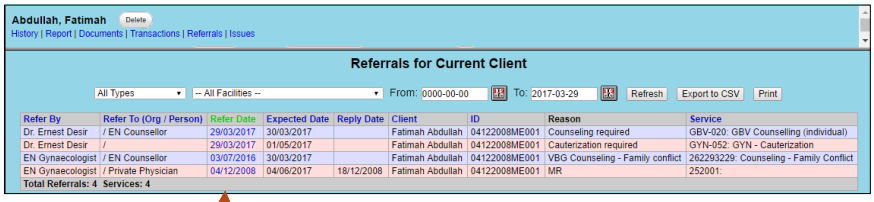


Steps	Menu	Managing referrals / Images

4 Reviewing referral history

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

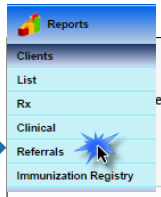


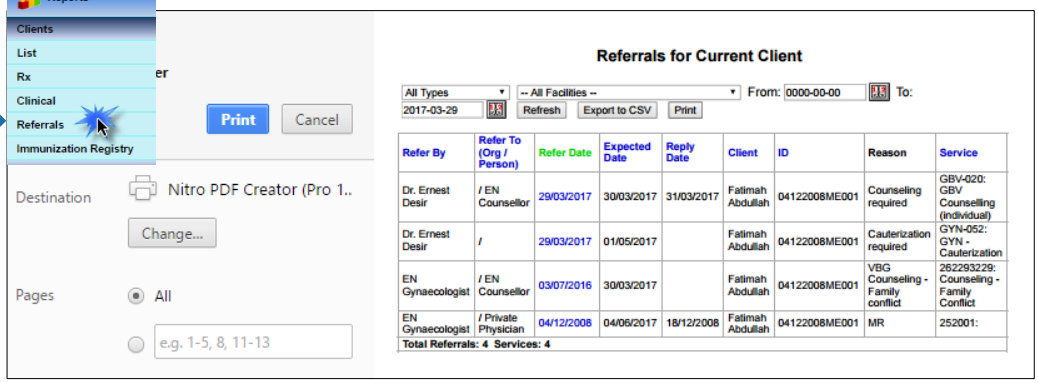


Note: Refer date is a link to open the corresponding Referral)

5 Printing a referral report

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





Purpose	To manage internal and external referrals, either outbound or inbound
Process description	When a service cannot be provided in the clinic, an **outbound external referral** 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 **outbound internal referral**. Receiving **(inbound) internal** or **external referral** 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.