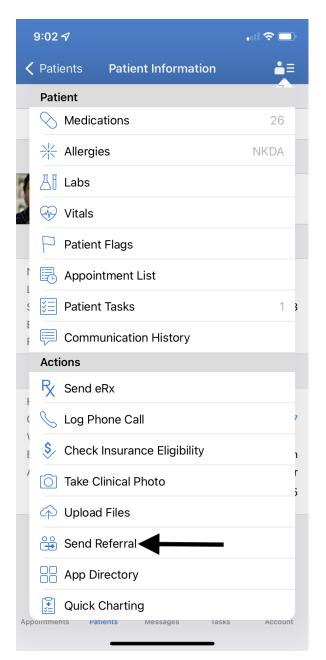
Sending a Referral through the iPhone

07/08/2024 7:24 pm EDT

Similar to referrals on the web, you can easily send a patient referral through the iPhone EHR app.

1. Tap on the patient's name and select Send Referral.



2. A window will open, first enter the recipient's information.

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	-				Sample s	sam (+6	50-555-58	555)
SEND				SENDEF	Doctor s	ample (+6	50-555-55	555)
Dr. Ja	ames Smith			Dr. Jai				
	support@drchro	ono.com		b				-
	Fax Number			E F				
5	(443) 555-5555			S (1				
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	Select a Contact	or Add New Contac	ct	Sa	ample			\bigotimes
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3. Verify the patient's information. Any information that needs to be changed here will need to be edited in the patient's chart.

Tap **Select Sections** to add:

- Tertiary Insurance
- Auto Insurance
- Worker's Compensation Insurance
- DME Insurance

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Close	Pati	ent Referral	Preview	
ax Info	Patient Info	Clinical Summary	Codes	D
PATIENT	INFORMATION			
Name		La	aurie Sample	
Sex			Female	
Age			31	
DOB			12/08/1990	
Phone		(650)) 555-5555	
SSN		1	11-22-3333	
Addr. Lir	ne 1	328	Gibraltar Dr	
Addr. Lir	ne 2			
PRIMARY	INSURANCE			
Compan	у	United	l HealthCare	
Insuranc	ce ID		123456789	
Plan Nar	me			
Group IE)		ABC123	
Subscrik	ber		Self	
Select S	Sections		🥖 Sign	

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Close	Select Sections	Save
Tertiary	/ Insurance	
Auto In	surance	
Worker	's Compensation Insuranc	e
Durable	e Medical Equipment Insur	ance

4. By default the Clinical Summary will be included in the referral. You can exclude it by deactivating the switch (



). You can also check or uncheck the boxes for information you would like to include or exclude.

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Clo	se	Patient Referral	Pr	eview
nfo	Patient Info	Clinical Summary	Codes	Docume
Inc	lude Clinical	Summary	(
PATII	Patient Na	me	All	None
\checkmark	Laurie Samp	e		
\checkmark	Sex Female			
\checkmark	Birthday 12/08/1990			
\checkmark	Race			
\checkmark	Ethnicity			
\checkmark	Preferred	Language		
<u>.</u>				News
CLIN	ICAL INFORMA	TION	All	None
	Problems			View
\checkmark	Medication	IS		View
\checkmark	Allergies			View
	Lab Tests			
	Vitals			
			1	Sign

5. Select any relevant codes by tapping on the (
) icon and searching for the codes. Selected codes will be added.

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Close	Patient Refer	ral	Preview	Close	Search	Selected (0)		Save	Close	Patient Refe	ral	Preview
Patient Info	Clinical Summary	Codes	Documents		on		8	Cancel	Patient Info	Clinical Summary	Codes	Documents
ICD-10 CODES			+	F53.0: Post	partum depi	ression			ICD-10 CODES			+
			+	P91.4: Neo	natal cerebra	al depression			F32.A Depre	ssion, unspecified		×
ICD-9 CODES				Z13.31: Enc	ounter for se	creening for d	epress	sion	ICD-9 CODES			+
CPT CODES			+	Z13.32: End maternal de		creening for			ICD-9 CODES			
HCPCS CODES	;		+	F32.A: Dep	ression, uns	pecified			CPT CODES			+
									HCPCS CODE	6		+
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6. Select any documents you would like to include by tapping on the (

) icon. Tap any documents, like clinical notes, you would like to add and Save. The selected documents will appear in the referral.

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Patient Info	Clinical Summary	Codes	Documents	Q Filter Cli	nical Notes b	by Date		Q Filte	er Docum	ients by N	ame		Patient Info	Clinical Summary	Codes	Documents
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OTHER DOCUM	(ENTO		+	Mon Apr 2	5, 2022 12:4	0PM			C-CDA Im	port			Fri Apr 29, 2	022 11:00AM		×
Only Supports			1	Fri Mar 11,	2022 08:10A	M			04/11/22 C-CDA Im	port			OTHER DOCU	MENTO		+
				Wed Mar 0	9, 2022 08:1	0AM		L 0	04/11/22					pdf, 04/01/22		×
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					2022 09:304			_م L	Lab Resul	ts.pdf						
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7. Optionally, you can sign the referral by selecting **Sign**.

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Close Patient Referral Preview
Fax Info Patient Info Clinical Summary Codes E
SENDER
Dr. James Smith
sample@sample.com
E Fax Number
RECIPIENT
Select a Contact or Add New Contact
E-mail Address
🖶 Fax Number
S Phone Number
INSTRUCTIONS
Sign
Sign

8. Tap **Preview** in the upper right when finished.

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Close	Patient Refer	ral	Preview
Patient Info	Clinical Summary	Codes	Documents
CLINICAL NOT	ES	•	+
Fri Apr 29, 2	022 11:00AM		×
OTHER DOCU	MENTS		+
Lab Results.	pdf, 04/01/22		×
Only Supports			
			🥖 Sign

8. Select **Fax Referral** to fax or the print icon to print. The referral will be sent and you will see a success message when it is complete.

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