Sending a Referral through the iPad

07/08/2024 7:27 pm EDT

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

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

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२ Sear	ch Appointment			ris (Female 41 02/11/1980) 🗸	(
07/29/2	2021 Thu (2)		Patient This is a sample patie	ent. 7 turn off sample patients go to the Account tab. Actions	
	Jenny (Jen) Harris 07/29 09:20AM	🔒 (Exam	Patient Information	R Send eRx	Start Visit
			Patient History	🌭 Log Phone Call	
0	Michelle Harris 07/29 09:40AM	(Exam	Face Sheet	Sector Check Insurance Eligibility	
			🛱 Timeline	O Take Clinical Photo	
			Problems	4 谷 Upload Files	
			◇ Medications	5 🔐 Send Referral	
			🔆 Allergies	4 🔁 Data Visualization	
			∐ Labs	Patient Education	
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			Patient Flags		
			Appointment List		
			🖧 Family History		View A
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2. A window will open. First, enter the recipient's information.

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		Fax Info	Patient Info	Clinical Summary	Codes	Documents	t tab.	\cup
07/29/2021 The	u (∠) (Jen) H⊧			Chinical Summary	codes	Documents	1	
07/29 09		SENDER					l	Start Visit
		James Smith	ı					
07/29 08	le Harri: 9:40AM	support@dr						
		Fax Number						
		(443) 555-	5555					
		RECIPIENT						
		Sample Doc	tor, MD					
		E-mail Addr	ess					
		- +1 201-55	5-5555					
		S Phone Num	ber					
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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.

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/29/2021 Thu (2)	Fax Info	Patient Info	Clinical Summary	Codes	Documents	t tab.				
Jenny (Jen) H	PATIENT INFORMATION	N	-				Start Visit			
07/29 09:20AM	Name				Jenny (Jen) Harris	l				
Michelle Harr	Sex				Female					
07/29 09:40AM	Age	41								
	DOB	OB 02/11/1980								
	Phone				(650) 215-6343					
	SSN				111-11-1111					
	Addr. Line 1			í	1001 N Rengstorff Ave					
	Addr. Line 2									
	PRIMARY INSURANCE									
	Company				Aetna					
	Insurance ID	Insurance ID 12								
	Plan Name									
	Group ID	987654321								
	Select Sections				🧖 Sign		View A			

Tap Select Sections to add:

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

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Q Search Appointment	01030				FICVICW		í
07/29/2021 Thu (2)	Fax Info	Close Select Sections Save		Documents	t tab.		
Jenny (Jen) H 07/29 09:20AM	PATIENT INFORM	Tertiary Ins	surance				Start Visit
V	Name	Auto Insura	ance	ny (Jen) Harris			
Michelle Harri: 07/29 09:40AM	Sex	Worker's C	Compensation Insurance		Female		
	Age	Durable Me	edical Equipment Insurance		41		
	DOB				02/11/1980		
	Phone				50) 215-6343		
	SSN				111-11-1111		
	Addr. Line 1				Rengstorff Ave		
	Addr. Line 2						
	PRIMARY INSUR						
	Company						View All
	Insurance ID						
	Plan Name						
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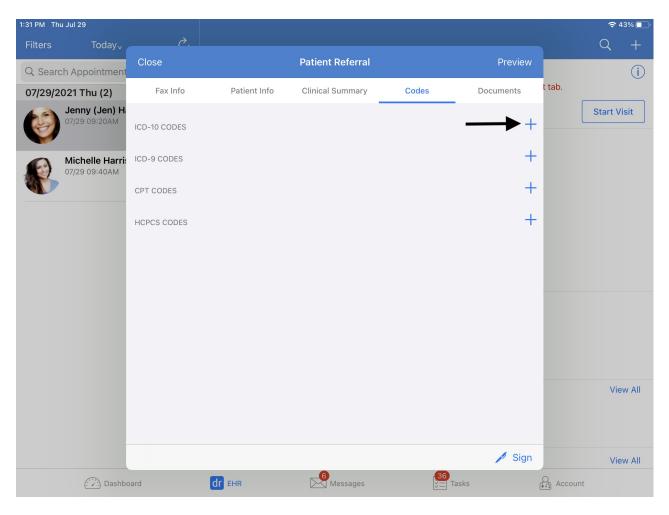
4. By default the Clinical Summary will be included in the referral. You can exclude it by deactivating the switch (



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

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	Close		Patient Referral		Pre	eview		
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07/29/2021 Thu (2)	Fax Info	Patient Info	Clinical Summary	Codes	Docume	ents		
Jenny (Jen) 07/29 09:20AN	H. Include Clinical S	Summary		_				Start Visit
Michelle Ha	PATIENT				All	None		
07/29 09:40AN								
	Sex Female							
	Birthday 02/11/1980							
	Race White							
	Not Hispanic of	or Latino						
	Preferred La English	anguage						
	CLINICAL INFORMAT	1001			All	None		
	Problems					View		
	Medications					View		
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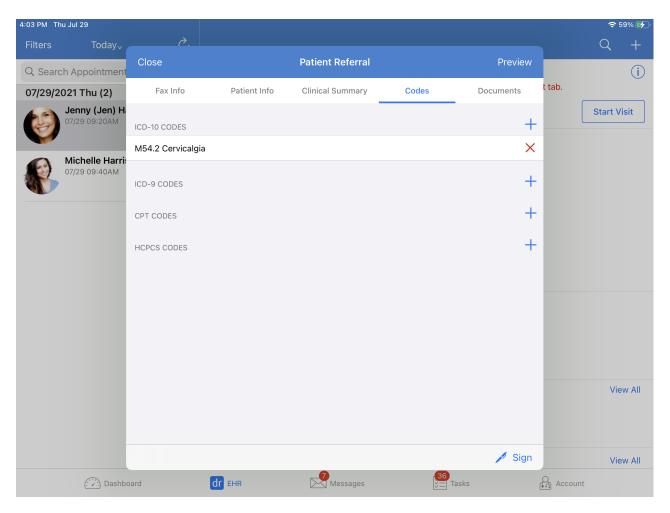
5. Select any relevant codes by tapping on the (



Search for the codes.

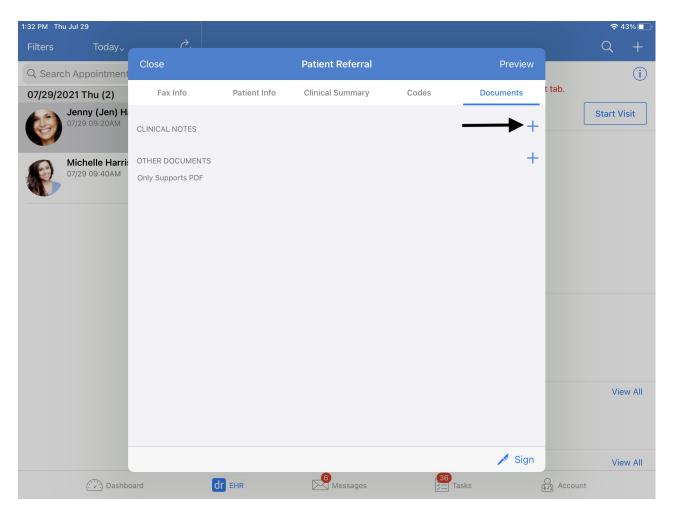
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07/29 09:20AM	ICD-10 CODE	Q Search for ICD-10	Codes			+	L		
Michelle Harri: 07/29 09:40AM	ICD-9 CODE					+			
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Selected codes will be added.



6. Select any documents you would like to include by tapping on the (

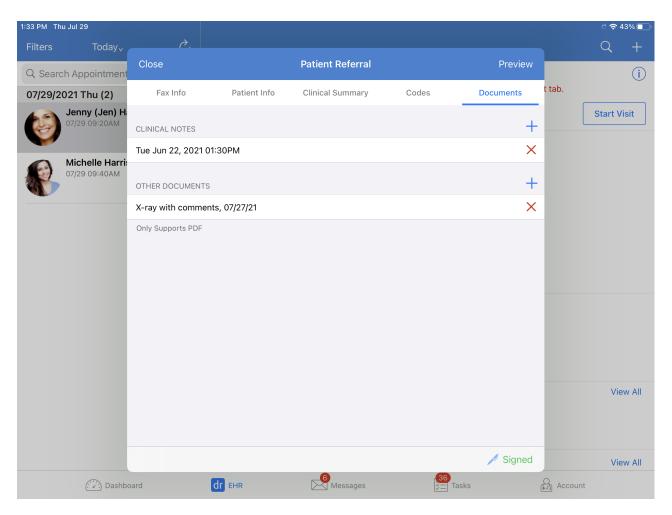
) icon.



Tap any documents, like clinical notes, you would like to add and Save.

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)7/29/2021 Thu (2)	Fax Inf	Close	Search	Selected (1)	Save	cuments	t tab.	
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Michelle Harri:	OTHER DOCK	Thu Jul 29, 2021 ()9:20AM	+				
07/29 09:40AM		Thu Jul 08, 2021 ()2:40PM					
		Tue Jun 22, 2021	01:30PM		~			
		Wed Jun 16, 2021	08:30AM					
		Sat Jun 12, 2021 1	0:15AM					
		Wed Jun 09, 2021	04:35PM					
		Wed Jun 09, 2021	09:00AM					
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The selected documents will appear in the referral.



7. Optionally, you can sign the referral by selecting **Sign**. Tap **Preview** in the upper right when finished.

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07/29/2021 Thu (2)		ratient into	Chinical Summary	00003	Documents	- r					
Jenny (Jen) Ha	James Smith					L	Start Visit				
Michelle Harris	🖶 🛛 Fax Number										
07/29 09:40AM											
	(443) 555-55	55									
	RECIPIENT										
		Select a Contact or Add New Contact									
	Select a Cont	act or Add New (Contact								
	E-mail Addres	S									
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8. Select **Fax Referral** to fax or the print icon to print.

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Filters Today _v			Q +
Q Search Appointment	🕻 Back	Close 🛱 Fax Refer	(j)
07/29/2021 Thu (2)			t tab.
Jenny (Jen) H			Start Visit
		Dr. Nick's Walk-In Clinic From: James Smith To: Sample Doctor, MD	
Michelle Harris		Email: support@dr/mono.com Email: Phone: (443) 555-5555 Phone: Fax: Fax: +1 301-555-5555	
07/29 09:40AM		Patient Name: Jenny (Jen) Harris Phone: (650) 215-6343	
		Age: 41 Address Mountain View, CA 94040 Sex Female Lat Address 2 Castro Street	
		SSN XXX-XX-1111 Main Audress Mountain View, CA 94040 Primary Insurance Secondary Insurance	
		Company: Company: Plan: Plan: Group #: Group #:	
		Policy #: Policy #: Subscriber: Jenny (Jen) Harris Subscriber: Jenny (Jen) Harris	
		Notice of confidentiality:	
		The information contained in this transmission is confidential. This transmission and the information contained in or attached as a file to it is intended for the	
		exclusive use of the addressent(i). If you are not the addresse (or one of the addressen), you are not an intended recipient. You are not an intended recipient, you hereby are notified that may use, disclosure, dissemination, distribution (other than to the addresse(s)), copying or taking of any action because of this information is strictly probabled.	
		Janes Smith	
		Provider-James Smith Date: 0729/21 0133 PM	View All
			View All
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9. The referral will send and you will see a success message when it is complete.

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() ⁰⁷	1 Thu (2) enny (Jen) H. (29 09-204M ichelle Harri: (29 09-404M		Free Land Soft	Address Wall address Benerging Party Par	00.000 900 216433 100 T Piequadri Ave Moustain Veye, CA 6400 2 Carpo there Moustain Veye, CA 6400 0) Harris Here as Table 15 Interested In Fa-		tab. Start Vi		07/29/2021 Thu (en) H DAM Harri:	n consistence in the second se	eserb) F b. d ary us, dictory, disentia blac	Address Wait Address Becontex Insu Company Referral sent! OK	Sarga Goos UC - 1 gl ans MM - 1 gl		t tab.	Start Visit
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