Incoming_Referral (Manual)

Workflow Summary	Testing Goals
Patient has a paper authorization for Consult in GEN SURG MOTW 795 [101660], PSR is transcribing paper authorization by creating a new referral record in CS-Link and scan document to referral record. **Script covers following fuctionality: 1. Referral Generation & 2. Referral Follow-up** **- Referral Generation: Referral Entry Scanning** **- Referral Generation: Referral Entry Manual** **- Referral Follow-Up: Referral Follow up for Duplicate Referrals**	Placing a manual referral record Scanning paper document into CS-Link Receiving a duplicate referral warning to notify user that there is already a referral in the system.

Scenrio:	PSR receives a call from a patient who would like to schedule her consultation. She indicates her PCP referred her to the Heart Institute for arrhythmia. PSR already have a paper authoriziation, which was faxed from her PCP.		
Script Owner	Not Assigned	Testing Progress	Not Started
Workflow Updates	Not Started	Baton Holder	Not Assigned
Data Prep	Not Started	Applcations: Cadence	

Prep: Inputs to Identify		Notes
Test patient		Use any patient.
Department	GEN SURG MOTW 795 [101660]	
Coverage		Use any commercial coverage.
Visit type	Consult	
Provider	MELO, NICOLAS [13446]	
Date		Use any date.
Appointment A		Use the first appointment you create.
Medication		Use any medication.
Order		Use a referral order.
Diagnosis	I49.9 (ICD-10-CM) - Cardiac arrhythmia, unspecified	
Level of service		Use a level of service appropriate for an office visit.
Workqueue		Use the referral workqueue for the referring department. If you're using Foundation System records, use workqueue 709.
Appointment B	GEN SURG MOTW 795 [101660]	Use the appointment you created for the referral.

Application	User/Dept	Step	Inputs	Status	Stops Testing?	Issue #	Issue Comments	Additional Info
Cadence		**Scenrio A**		Untested				
Cadence	0020/101660	Create a new manual referral: Epic > Referrals > Referral Entry> In Referral Look Up, enter in patient's name > New	Patient Name	Untested				

Application	User/Dept	Step	Inputs	Status	Stops Testing?	Issue #	Issue Comments	Additional Info
Cadence	0020/101660	Complete Incoming manual referral: **In General Section** Type: Outpatient Surgery Referred by: PALMER, CHRISTINA SHEARER [1085624] Referred to Department: AHSP WOMENS HEART CTR [11514] **In Dx/Px Section** Diagnoses: I49.9 (ICD-10-CM) - Cardiac arrhythmia, unspecified Procedure: 99245 - PR OFFICE CONSULTATION NEW/ESTAB PATIENT 80 MIN **In Authorization Section** Enter Authorization details, including Auth #, Precert # and Expiration Date	Type, Referred by, Referred to Department, Diagnoses, Procedure, Auth #, Precert #, and Expiration Date	Untested				
Cadence/HID		**In Notes Section:** Type: Approved Letter Attachment: click Scan to scan in fax to the record Change the status: Authorizied (2)	Type, Notes	Untested				
Cadence		Accept the referral and Schedule a consult for the patient Appts> Find patient's name Click Make Appt: Department: GEN SURG MOTW 795 [101660] Appointment Notes: FreeText Visit Type: CONSULT [110000] Provider: MELO, NICOLAS [13446] Clilck Search and Schedule for first avaialble slot	Appointment, Appointment Notes, Visit Type, Provider, Search and Schedule	Untested				
Cadence		**Scenrio B:**		Untested				
Cadence	0020/101660	Create a new manual referral: Epic > Referrals > Referral Entry> In Referral Look Up, enter in patient's name (Same patient from the Scenrio A > New	Patient Name	Untested				

Application	User/Dept	Step	Inputs	Status	Stops Testing?	Issue #	Issue Comments	Additional Info
Cadence	0020/101660	Complete Incoming manual referral: **In General Section** Type: Outpatient Surgery Referred by: PALMER, CHRISTINA SHEARER [1085624] Referred to Department: AHSP WOMENS HEART CTR [11514] **In Dx/Px Section** Diagnoses: I49.9 (ICD-10-CM) - Cardiac arrhythmia, unspecified Procedure: 99245 - PR OFFICE CONSULTATION NEW/ESTAB PATIENT 80 MIN **In Authorization Section** Enter Authorization details, including Auth #, Precert # and Expiration Date	Type, Referred by, Referred to Department, Diagnoses, Procedure, Auth #, Precert #, and Expiration Date	Untested				
Cadence	0020/101660	PSR receives duplicate referral warning. Review duplicate warning Close out the duplicate referral with a reason: "Duplicate"		Untested				
Cadence	0020/101660	Reconciling potential duplicate referrals in WQ: Go to Recipient WQ - Show a duplicate referral from Order column		Untested				