### Incoming_Referral (Manual)

**Workflow Summary**

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 functionality:**
- 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

**Scenario:**

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 authorization, which was faxed from her PCP.

**Input:**

- 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]

**Applications:**

- Cadence

<table>
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<tr>
<th>Application</th>
<th>User/Dept</th>
<th>Step</th>
<th>Inputs</th>
<th>Status</th>
<th>Stops Testing?</th>
<th>Issue #</th>
<th>Issue Comments</th>
<th>Additional Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cadence</td>
<td>0209/101660</td>
<td>Scenario A</td>
<td>Create a new manual referral: Epic &gt; Referrals &gt; Referral Entry &gt; In Referral Look Up, enter in patient’s name &gt; New</td>
<td>Patient Name</td>
<td>Untested</td>
<td></td>
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**Notes:**

- Testing Goals:
  - 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.

**Measures:**

- Data Prep: Not Started
- Testing Progress: Not Started
- Baton Holder: Not Assigned
- Script Owner: Not Assigned
- Testing Progress: Not Started
- Workflow Updates: Not Started
- Baton Holder: Not Assigned
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</table>
| 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: Authorized (?) | 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]  
Click Search and Schedule for first available slot | Appointment, Appointment Notes, Visit Type, Provider, Search and Schedule | Untested |
| Cadence     | Scenrio B: | 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 |
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<tr>
<td>Cadence</td>
<td>0020/101660</td>
<td>Complete Incoming manual referral: <strong>In General Section</strong> Type: Outpatient Surgery Referred by: PALMER, CHRISTINA SHEARER [1085624] Referred to Department: AHSP WOMENS HEART CTR [11514] <strong>In Dx/Px Section</strong> Diagnoses: I49.9 (ICD-10-CM) - Cardiac arrhythmia, unspecified Procedure: 99245 - PR OFFICE CONSULTATION NEW/ESTAB PATIENT 80 MIN <strong>In Authorization Section</strong> Enter Authorization details, including Auth #, Precert # and Expiration Date</td>
<td>Type, Referred by, Referred to Department, Diagnoses, Procedure, Auth #, Precert #, and Expiration Date</td>
<td>Untested</td>
<td></td>
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<tr>
<td>Cadence</td>
<td>0020/101660</td>
<td>PSR receives duplicate referral warning. Review duplicate warning Close out the duplicate referral with a reason: “Duplicate”</td>
<td></td>
<td></td>
<td>Untested</td>
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<tr>
<td>Cadence</td>
<td>0020/101660</td>
<td>Reconciling potential duplicate referrals in WQ: Go to Recipient WQ - Show a duplicate referral from Order column</td>
<td></td>
<td></td>
<td>Untested</td>
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