Trinity Health — EpicCareLink

Working with Referrals

Create a new referral

To create a referral, you might be required to enter information such as the referring and referred to providers, procedures to be performed, or diagnoses associated with the referral. You can also enter notes to communicate other information about the referral.

1. Select the Patient tab and click Order Entry.
2. Click **Preference** List to see a list of available orders.
3. Click Referrals and select the referral you want to order.
4. Click ✔ **Accept** Orders.
5. In Order Entry, click the link for the referral to add information such as the associated diagnoses, attach any relevant files, and enter any comments. Click ✔ **Accept** when you're finished.
6. Click ✔ Sign Orders.
7. Enter your password if prompted and click ✔ **Accept.**

View a list of referrals for a patient

1. Select the **Patient tab** and click **Referral by Member.**
2. The patient's active referrals appear, including any that are new, open, authorized, or pending review. To see all referrals, select **Show All Referrals** in the **View Option** field.
3. For more information about a referral, click the referral ID link to view a report.
   - You can't edit a referral that you've already created, but you can add additional notes or attachments to it and send a referral message.

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View a list of referrals for specific providers or locations

1. Select the **Referral Search** tab.
2. Select either **Incoming** or **Outgoing** depending on whether you want to see referrals sent to your organization or referrals placed by your organization.
3. In the **Referred To** or **Referred By** section, select one or more providers or locations.
4. In the **Referral Status** section, select each referral status that you want to include in your search results.
5. If you selected **Outgoing** in step 2, select a scheduling status in the **Scheduling Status** section.
6. Enter dates in the From and To fields to limit your search to particular dates.
7. Click **Search.**
8. For more information about a referral, click the referral ID link to view a report. Click 📂 to open the associated patient's chart.