Beth Israel Lahey Health

Tip Sheet

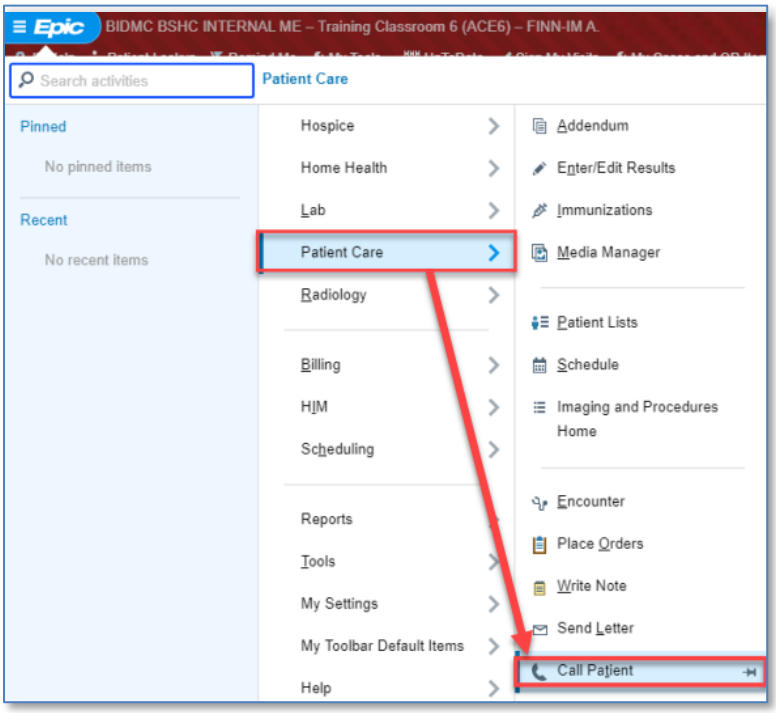
ED Referral Notes

This tip sheet describes the steps to document and then view ED Referral notes.

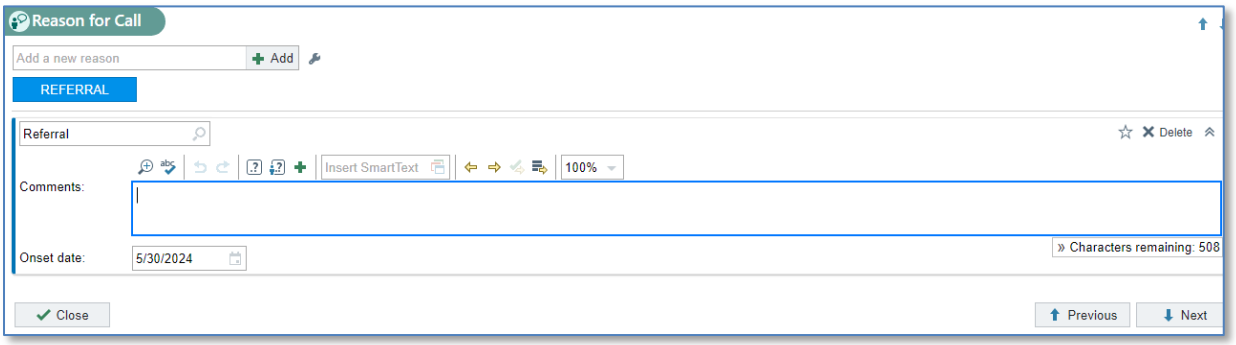
Create a telephone encounter to Write a Referral Note

If you do not have a current open encounter for the patient or if the patient is calling in and you are referring them, you can create a telephone encounter and the referral note can be documented in that encounter. The referral note can also be documented during an ambulatory visit encounter or other encounters depending on the patient context.

1. Navigate to the **Epic** Button**, Patient Care,** and **Call Patient**.



2. Search for and select the patient.
3. Open the **Contacts** section.
4. Click ✚**Incoming Call**, ✚**Outgoing Call**, or ✚ **Other**.
5. Update the **Reason for Call** and any additional comments.



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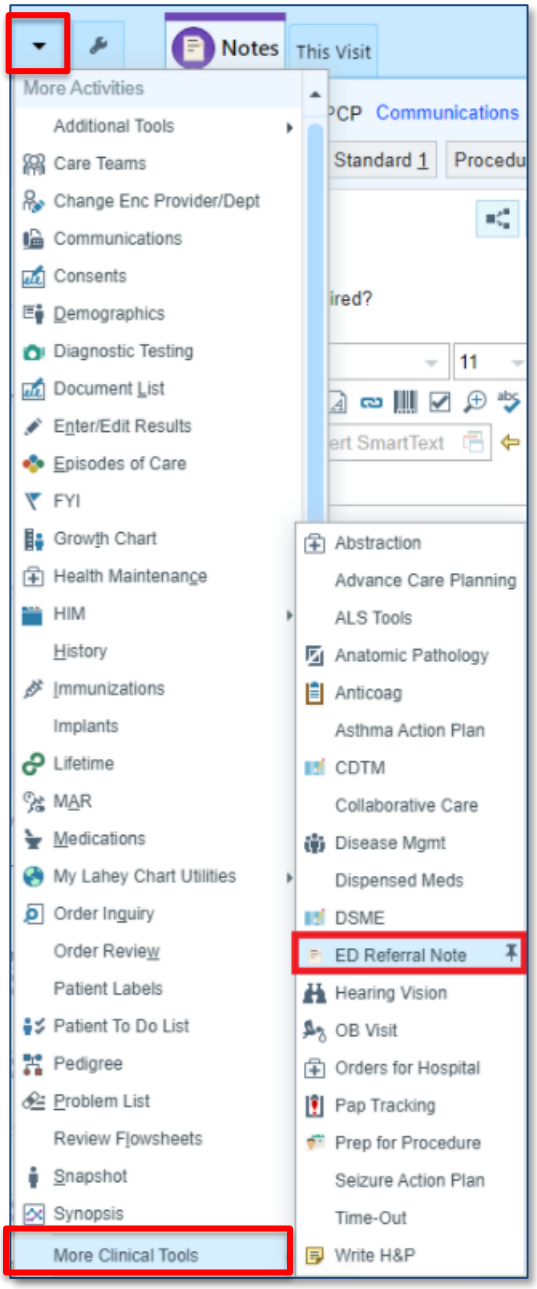
6. Navigate to More activities > **More Clinical Tools > ED Referral Note**.
7. Document the note, sign the note and the encounter when completed.

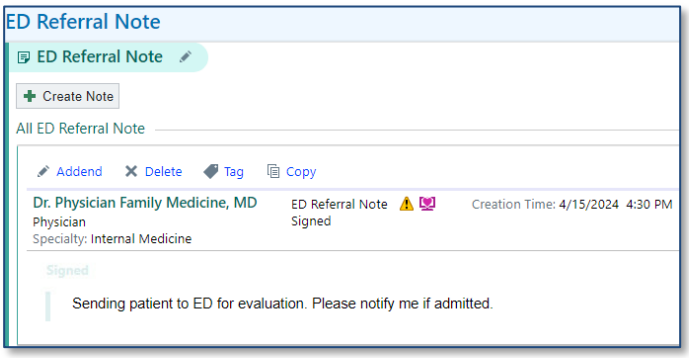
Write the Referral Note – BILH Providers

1. Referring Provider can access the ED Referral Note under More activities > More Clinical Tools > ED Referral Note.

   Click on the pushpin icon next to the activity if you would like to save it to the activities at top of the chart.
   Or, CTRL + Space to search for ED Referral Note

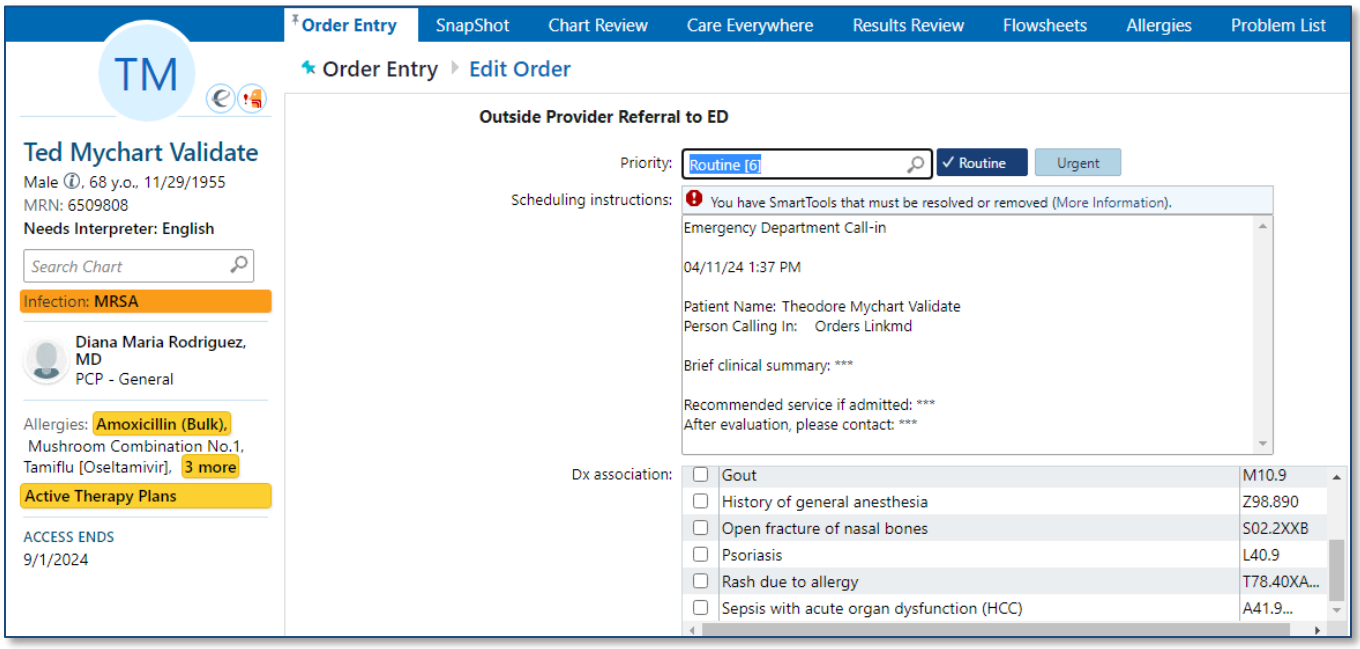


2. Document your note and sign when completed.



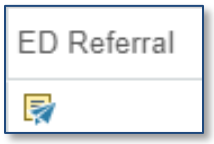
Order Referral via Link – External Providers

1. Under Order Entry, order **Outside Provider Referral to ED.**
2. In the scheduling instructions field, address any wildcards (***) and provide relevant info for the ED provider.
3. **Sign** the order.



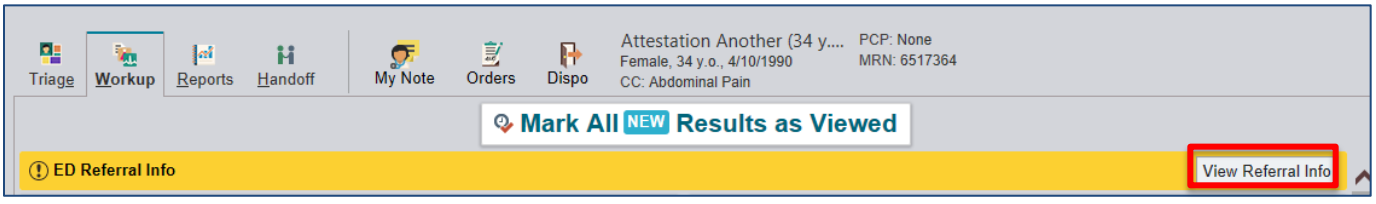
ED Staff

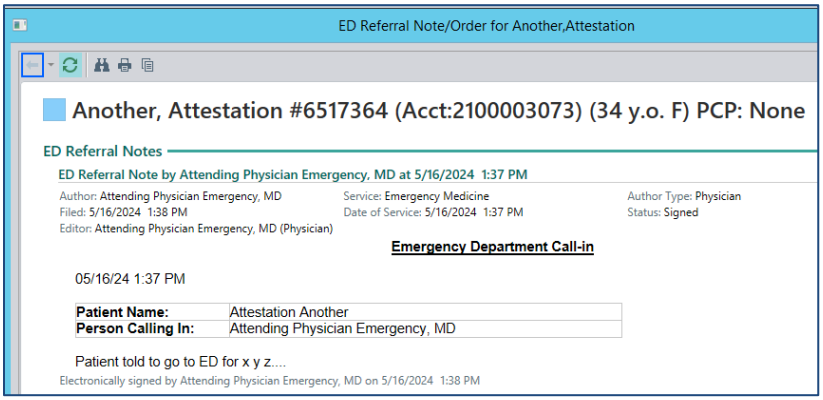
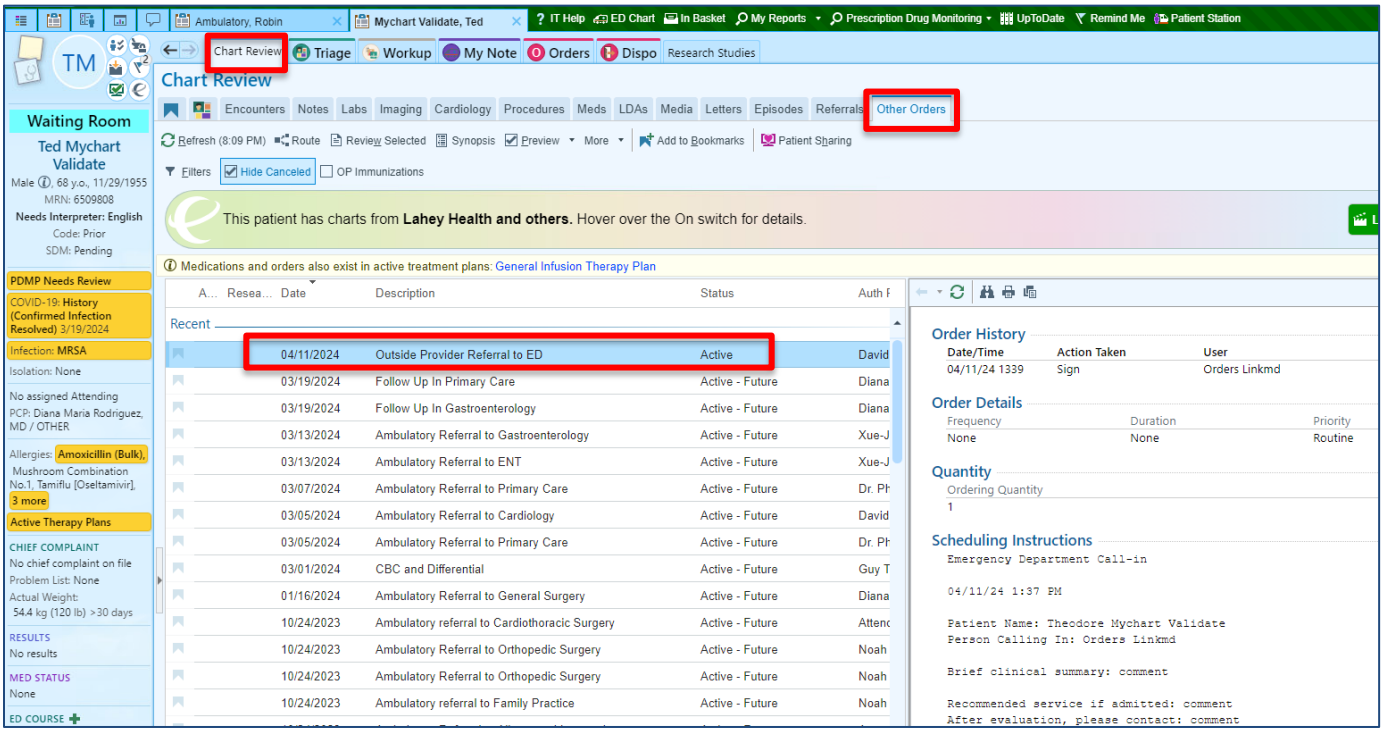
When the patient arrived in the ED, an icon will display in the ED Referral column on the ED Track Board if an ED Referral note or ED Referral order has been signed in the last 72 hours.



View ED Referral Note/Order

A banner will display on the ED workup tab with a button to view the referral info.





The Referral notes/orders are also viewable in the Notes or Other Orders tabs in **Chart Review**.