



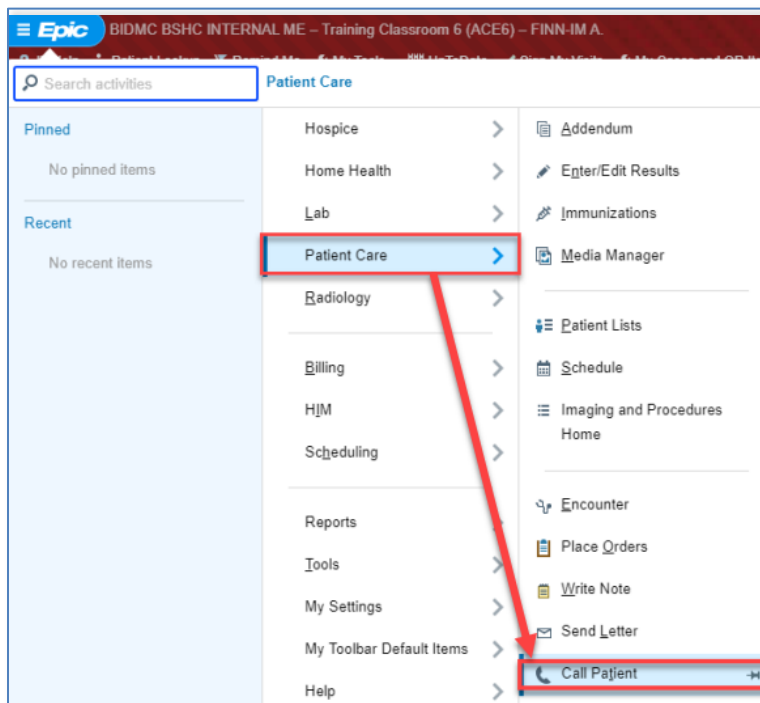
ED Referral Notes

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

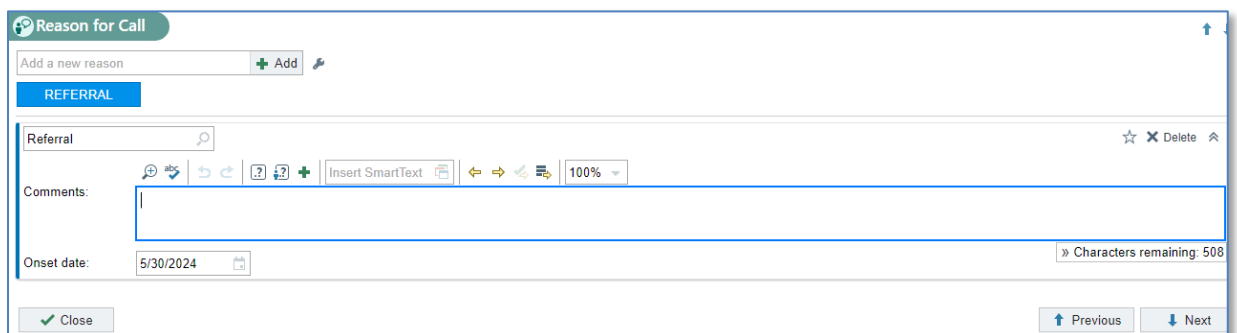
Create a telephone encounter to Write a Referral Note

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.



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.



ED Referral Note

 ED Referral Note 

[+ Create Note](#)

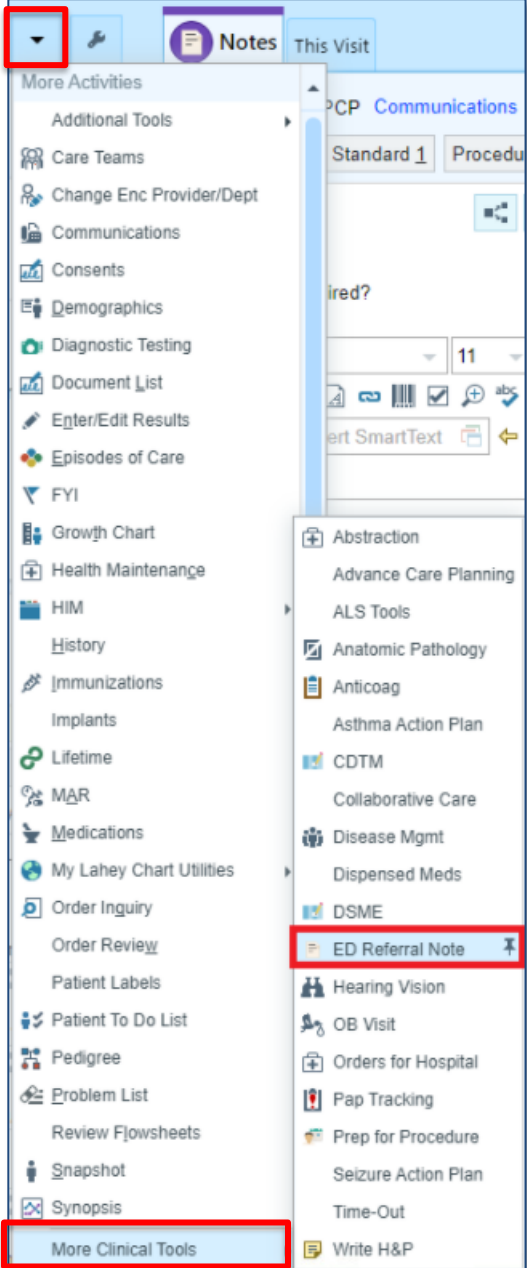
All ED Referral Note

[Addend](#) [Delete](#) [Tag](#) [Copy](#)

Dr. Physician Family Medicine, MD ED Referral Note   Creation Time: 4/15/2024 4:30 PM
Physician Signed
Specialty: Internal Medicine

Signed

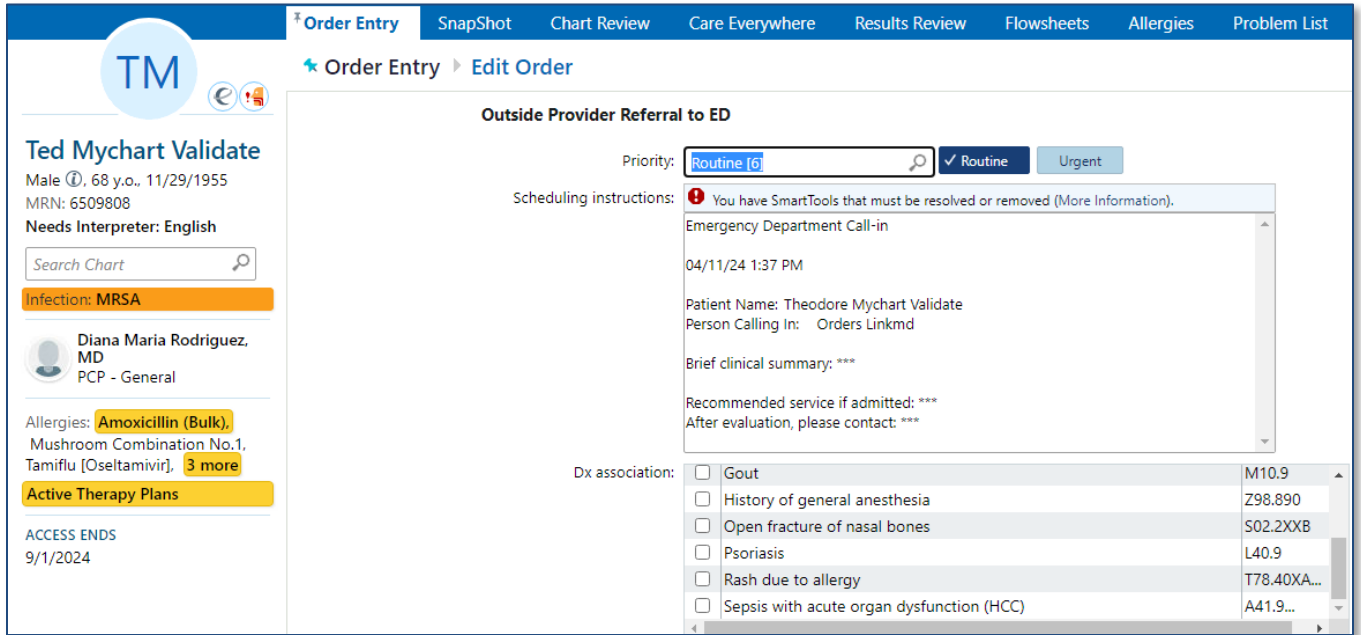
Sending patient to ED for evaluation. Please notify me if admitted.



The screenshot shows the Epic EMR interface. At the top, there are tabs for 'Notes' and 'This Visit'. A dropdown menu is open, showing a list of 'More Activities'. The 'More Clinical Tools' option at the bottom of this menu is highlighted with a red box. A submenu is open for 'More Clinical Tools', and the 'ED Referral Note' option is highlighted with a red box. Next to 'ED Referral Note' is a pushpin icon, which is also highlighted with a red box. Other options in the submenu include Abstraction, Advance Care Planning, ALS Tools, Anatomic Pathology, Anticoag, Asthma Action Plan, CDTM, Collaborative Care, Disease Mgmt, Dispensed Meds, DSME, Hearing Vision, OB Visit, Orders for Hospital, Pap Tracking, Prep for Procedure, Seizure Action Plan, Time-Out, and Write H&P.

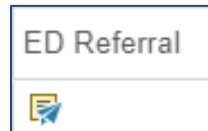
Order Referral via Link – External Providers

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.



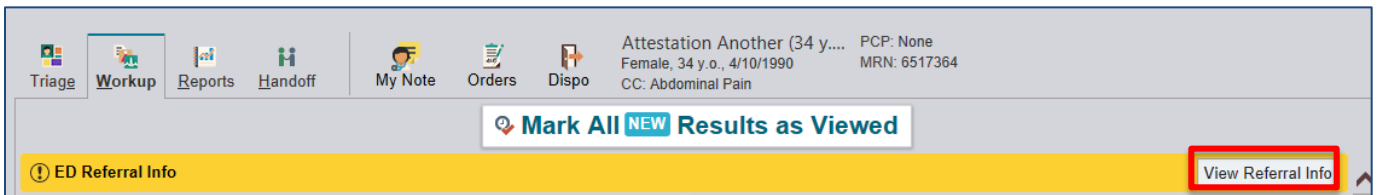
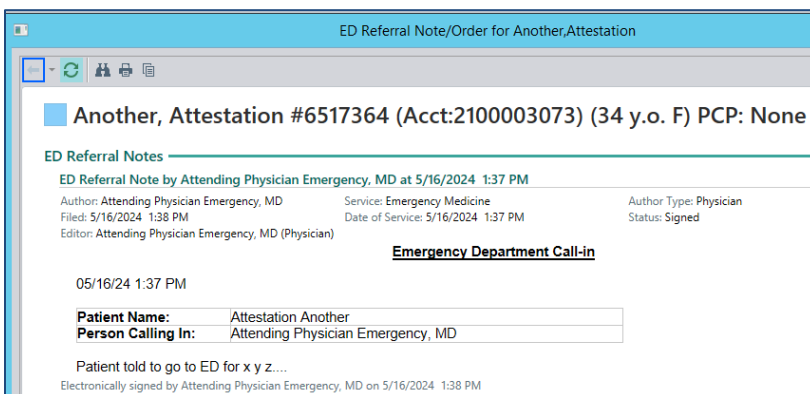
ED Staff

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**.

Chart Review

Encounters | Notes | Labs | Imaging | Cardiology | Procedures | Meds | LDAs | Media | Letters | Episodes | Referrals | **Other Orders**

Refresh (8:09 PM) | Route | Review Selected | Synopsis | Preview | More | Add to Bookmarks | Patient Sharing

Filters: Hide Canceled OP Immunizations

This patient has charts from **Lahey Health and others**. Hover over the On switch for details.

Medications and orders also exist in active treatment plans: [General Infusion Therapy Plan](#)

A...	Resea...	Date	Description	Status	Auth F
		04/11/2024	Outside Provider Referral to ED	Active	David
		03/19/2024	Follow Up In Primary Care	Active - Future	Diana
		03/19/2024	Follow Up In Gastroenterology	Active - Future	Diana
		03/13/2024	Ambulatory Referral to Gastroenterology	Active - Future	Xue-J
		03/13/2024	Ambulatory Referral to ENT	Active - Future	Xue-J
		03/07/2024	Ambulatory Referral to Primary Care	Active - Future	Dr. Ph
		03/05/2024	Ambulatory Referral to Cardiology	Active - Future	David
		03/05/2024	Ambulatory Referral to Primary Care	Active - Future	Dr. Ph
		03/01/2024	CBC and Differential	Active - Future	Guy T
		01/16/2024	Ambulatory Referral to General Surgery	Active - Future	Diana
		10/24/2023	Ambulatory referral to Cardiothoracic Surgery	Active - Future	Attenc
		10/24/2023	Ambulatory Referral to Orthopedic Surgery	Active - Future	Noah
		10/24/2023	Ambulatory Referral to Orthopedic Surgery	Active - Future	Noah
		10/24/2023	Ambulatory referral to Family Practice	Active - Future	Noah

Order History

Date/Time	Action Taken	User
04/11/24 1339	Sign	Orders Linkmd

Order Details

Frequency	Duration	Priority
None	None	Routine

Quantity

Ordering Quantity
1

Scheduling Instructions

Emergency Department Call-in

04/11/24 1:37 PM

Patient Name: Theodore Mychart Validate
Person Calling In: Orders Linkmd

Brief clinical summary: comment

Recommended service if admitted: comment
After evaluation, please contact: comment