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.

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