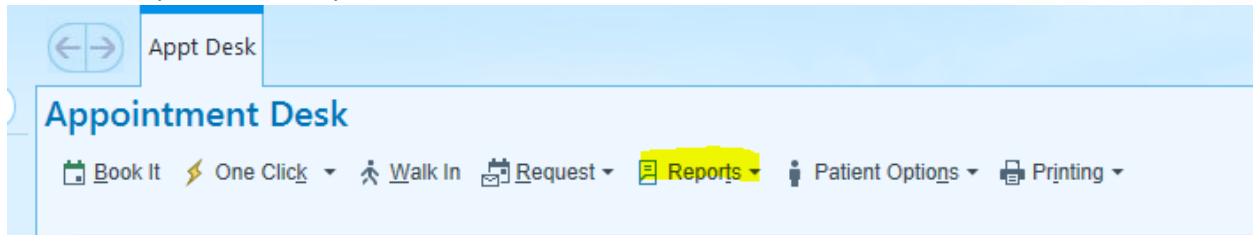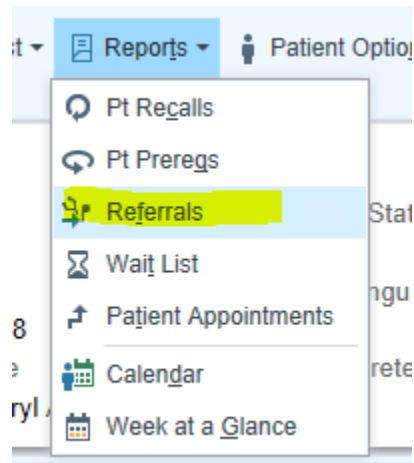# Creating a Referral

In EPIC under Appts tab look up the patient via MRN or Name and DOB.
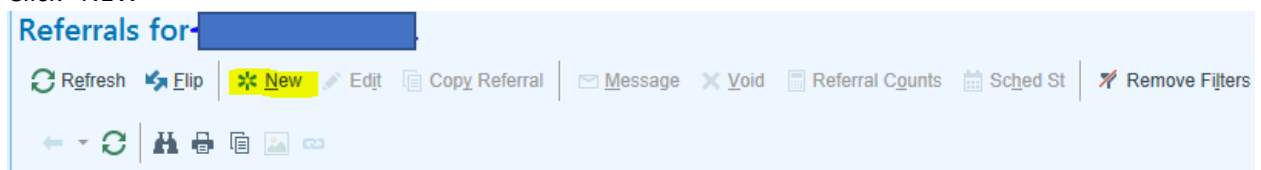Click the drop down on "Report"

Select "Referrals"

Click "NEW"

Now you are ready to start the referral! Please see next page….

Step #1: GENERAL
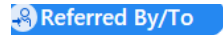
Highlight
- "Type" – enter '3' "Consultation (Initial/Follow-up)"
- "Class" – enter '2' "Incoming"
- "Status" – enter #1 "Authorized" unless this patient has an HMO, in which case Hoag Epic will automatically create its own Auto Authorization **(PLEASE keep in mind we do not take Cal-Optima at all)**
- "Reason" – enter #3 for "Covered Benefit" for all PPO patient's

STEP #2: REFERRED BY/TO

Click the Referred By/To button
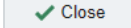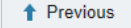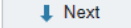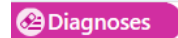
Highlight Sections:
- Provider's information should auto populate once Physician's Name is entered
- "POS Type" – enter #22 "On Campus - Outpatient Hospital" – once this is entered the red exclamation points for Location and Department specialty, department, provider specialty and provider address should disappear.
- "Department" – type Genetics our different locations should pop up ****Please choose a location so the referral hits our work queue, this is a super important step to include******
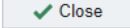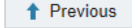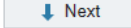 ****Please note that our Huntington Beach location does not appear on the location's options, for this please add "Genetics" under Provider Specialty and e-mail* **hereditarycancer@hoag.org**
- "Provider Specialty" – type Genetics unless already auto populated

STEP #:3 DIAGNOSIS

- Please enter all related ICD-10 codes for patient

STEP #4: SERVICES
Click on Services button

- "Procedure" – enter 96040 that is the **ONLY** CPT Code we use for Genetics
- "Requested Total" – change request from 1 to 2 so that it covers the entire 1-hour appointment.

STEP #5: COMMUNICATIONS:

- **IF** there is anything you would like to let us know about or information you feel is necessary please add a Note or Notification.

THANK YOU