ED Referral for Proactive Clinic Scheduling (Internal to any UNC entity)

Often times patients seen in the ED do not require admission; however are strongly encouraged to follow up with a particular specialty for continued care. EPIC now gives the ED providers the ability to send a referral to a particular clinic to help facilitate proactive scheduling with the patient for a follow up visit. This process does not take place in, nor take the place of the Follow-Up section of your Discharge Navigator.

Best Practice Workflow

1. In the **Discharge Navigator**, search and select the appropriate discipline in the **Prescriptions / Referral** header under the **Orders** section.

2. Once the discipline is selected, open the referral order by clicking on the blue hyperlink.
3. In the Order Composer, select the ‘To Dept’ and any additional details. This step is imperative so the referral will be routed to the correct work queue for the staff to call the patient and schedule the appointment. **NOTE:** If the department/clinic is not specified, the order will NOT result in an appointment being made for the patient.

![Order Composer screenshot](image1)

**Note:** If this is a frequent department referral, once you click ‘Accept’, you can then click on the Star to add to your Favorites.

![Order Composer screenshot](image2)

4. The referral will be listed in the patient’s AVS instructions. Clinicians can educate their patients that the facility should call to schedule an appointment; however if they don’t here from them they should call this clinic to follow up.

![Follow-up Information](image3)

5. The staff at the clinic will find the referral in their appropriate Work Queue – Schedule Order and take the appropriate steps to call the patient and schedule the appointment. The front desk staff can quickly see that the ordering department was the emergency department and which provider put in the referral.

![Work Queue screenshot](image4)
6. If the department is not selected by the ED provider the referral will not be routed to the correct clinic work queue. However if the patient calls the clinic, the front desk can look up the patient and see if they have an active referral and schedule the appointment as needed. These active referrals can be found in Chart Review under the Referral tab.