

Approved: 8/15/2023

## **HEALTH INFORMATICS**

There are times when users need to check on the authorization or scheduling status of a referral placed in Epic. To review a referral's status, follow the steps below:

- 1. Access the patient's Appointment Desk, click
- 2. Select the patient
- 3. Open the Referrals tab
- 4. Review the Referral information in the columns:
  - a. **Status** displays the current authorization status
  - Sched/Complete displays the number of scheduled appointments first and the number of completed appointments second
  - c. Sched Status displays the current scheduling status

←→ Appt Desk		
Appointment Desk		
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Patient Summary (Edit a)		
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Schedule from Referral Edit Referral New Referral View Referral Counts

- 5. Double-click on the row
  - Summary Report Opens displaying the Referral Information, Coverages, Service Level Auths, and Communication Information

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## Notes:

- If the referral is for Imaging or something that needs to be scheduled, follow the same process on the **Active Requests** tab on the **Appt Desk**
- Not all information available is visible on the Summary Report. To view everything related to the referral, click on the **View Referral** button, and open the **Referral Summary**

