## Sending a Referral through the iPhone

07/24/2024 9:11 pm EDT

Similar to referrals on the web, you can easily send a patient referral through the iPhone EHR app.

1. Tap on the patient's name and select Send Referral.



2. A window will open, first enter the recipient's information.

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SEND	ER			SENDEF	Doctor s	ample (+6	50-555-55	555)
Dr. Ja	ames Smith			Dr. Jai				
	support@drchro	ono.com		b				-
	Fax Number			E F				
5	(443) 555-5555			S (1				
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	Select a Contact	or Add New Contac	ct	Sa	ample			$\bigotimes$
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3. Verify the patient's information. Any information that needs to be changed here will need to be edited in the patient's chart.

Tap **Select Sections** to add:

- Tertiary Insurance
- Auto Insurance
- Worker's Compensation Insurance
- DME Insurance

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Femal			Sex
3			Age
12/08/199			DOB
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Close	e Select Sections	Save
	Tertiary Insurance	
	Auto Insurance	
	Worker's Compensation Insurance	
	Durable Medical Equipment Insura	nce

4. By default the Clinical Summary will be included in the referral. You can exclude it by deactivating the switch (



). You can also check or uncheck the boxes for information you would like to include or exclude.

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nfo	Patient Info	Clinical Summary	Codes	Docume
Inc	lude Clinical	Summary	(	
	Patient Na	me	All	None
	Laurie Samp	e		
$\checkmark$	Sex Female			
$\checkmark$	<b>Birthday</b> 12/08/1990			
$\checkmark$	Race			
$\checkmark$	Ethnicity			
$\checkmark$	Preferred	Language		
<u>.</u>				News
CLIN	ICAL INFORMA	TION	All	None
	Problems			View
$\checkmark$	Medication	IS		View
$\checkmark$	Allergies			View
	Lab Tests			
	Vitals			
			1	Sign

5. Select any relevant codes by tapping on the (
) icon and searching for the codes. Selected codes will be added.

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Patient Info	Clinical Summary	Codes	Documents	Q Depres	sion		8	Cancel	Patient Info	Clinical Summary	Codes	Documents
ICD-10 CODES			+	F53.0: Po	stpartum depi	ession			ICD-10 CODES			+
				P91.4: Ne	onatal cerebra	I depression			F32.A Depre	ssion, unspecified		×
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6. Select any documents you would like to include by tapping on the (

) icon. Tap any documents, like clinical notes, you would like to add and Save. The selected documents will appear in the referral.

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7. Optionally, you can sign the referral by selecting **Sign**.

Close Patient Referral Preview		
Fax Info Patient Info Clinical Summary Codes D	31	л
SENDER		
Dr. James Smith	. (	Close Signature
sample@sample.com		Save signature for reuse
Fax Number		
RECIPIENT Select a Contact or Add New Contact E-mail Address Canada Addres Cana		JSmi
Phone Number		
INSTRUCTIONS		

8. Tap **Preview** in the upper right when finished.

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Close	Patient Refer	ral	Preview
Patient Info	Clinical Summary	Codes	Documents
CLINICAL NOT	ES	•	+
Fri Apr 29, 2	022 11:00AM		×
OTHER DOCU	MENTS		+
Lab Results.	pdf, 04/01/22		×
			🥖 Sign

8. Select **Fax Referral** to fax or the print icon to print. The referral will be sent and you will see a success message when it is complete.

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