

# Referral Orders

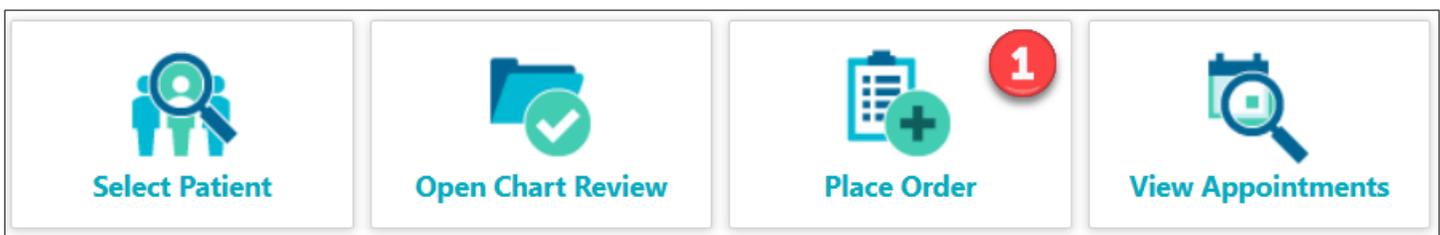
## CareLink

ECU Health CareLink allows community users to electronically submit specialty referrals and radiology orders to any ECU Health Facility.

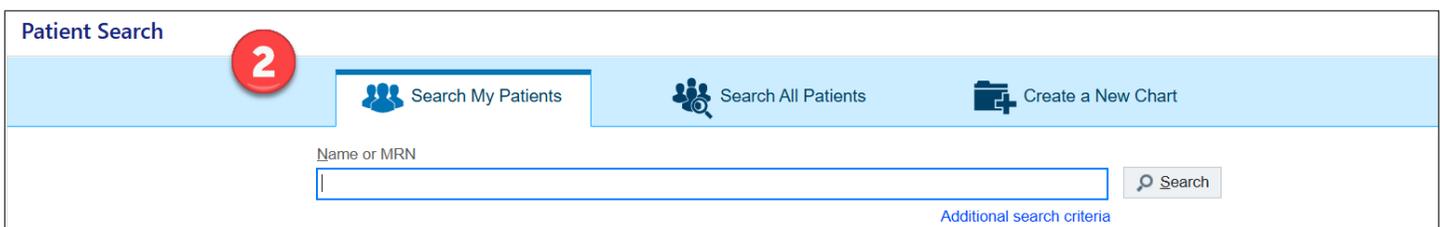
If you need to send a referral for specialty services, please follow the steps outlined in this tip sheet to ensure accurate and efficient submission.

### Step 1: Start the Referral Order Process

- From the CareLink home screen, click the **[Place Order]** icon. This will open the order entry workflow where you can begin entering details for a specialty referral order.



### Step 2: Search for Your Patient



- Search for your patient using one of the following options:
  - Use **[Search My Patients]** if patient is linked to your practice or was accessed recently.
  - If not found, choose the tab for **[Search All Patients]** to expand your search.
  - If the patient still cannot be located, select **[Create a New Chart]** to manually enter their information.



When creating a new chart in CareLink, all fields marked with a red stop sign must be completed. If the full SSN is not available or not on file, please enter all 1s (e.g., 111-11-1111) to proceed. Once all required fields are completed and the chart is created, you may continue with entering the referral order.

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### Step 3: Select the Authorizing Provider

- Click [**Select Authorizing Provider**] and choose the appropriate ordering provider from the list, then select [**Accept**] to confirm your selection.

**Note:** if your practice only has one provider, this screen will not appear. You can proceed directly to Step 4.

The screenshot shows the 'Order Entry' section of the CareLink interface. At the top, there is a navigation bar with tabs for 'SnapShot', 'Chart Review', 'Care Everywhere', 'Results Review', 'Flowsheets', 'Problem List', 'Growth Charts', and 'Order Entry'. Below the navigation bar, the 'Order Entry' section is titled with a star icon and the text 'Order Entry'. The main content area contains the instruction 'Select an authorizing provider for this order.' Below this instruction is a dropdown menu labeled 'Select Authorizing Provider' with a red circle containing the number 3 next to it. A red exclamation mark icon is visible in the dropdown menu. Below the dropdown menu is a button labeled 'Accept' with a green checkmark icon.

### Step 4: Find the Correct Referral Order

- To locate the appropriate referral order, use one of the following methods:
  - Type the specialty name or Px Code (formerly known as the AMB referral shortcut code) into [**New procedure**] box, or
  - Click [**Preference List**] and browse the **Adult Services** or **Children's Health** sections, depending on your patient's age.

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### Step 5: Complete the Referral Order

- Once referral order has been selected, fill in all required and relevant fields within the order form.

Class:

Referral: To dept:  **5**

To provider:

Address

Priority:

Questions:

|  | Answer               | Comment              |
|--|----------------------|----------------------|
| 1. Order Authorization   | <input type="text"/> |                      |
| 2. Authorization start & end date:                                 | <input type="text"/> |                      |
| 3. Reason for referral:  | <input type="text"/> | <input type="text"/> |
| 4. If "Refer To" provider not found, enter provider Name/Location: | <input type="text"/> |                      |



When completing the Referral To dept section in a referral order, be sure to reference the ECU Health CareLink Department List located in the Quick Links section on the CareLink home page. This ensures referrals are directed to the correct department.

### Step 6: Enter Reason for Referral (if not prompted)

- If the Questions box in step 5 does not include a Reason for referral question, please use the Scheduling instructions box to enter relevant details about why the patient is being referred.

Scheduling instructions:

**6**

If the Questions box above does not include a Reason for referral question, please use ▲ this box to enter any relevant details about why the patient is being referred.

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### Step 7: Add a Diagnosis Association

**Dx association:** Add a new diagnosis:  **7**

- To associate a diagnosis with the referral order:
  - Enter the ICD-10 code directly, or
  - Type the diagnosis name as free text into the field to locate and select the appropriate code.

### Step 8: Include Supporting Documentation

- To attach relevant documents with your referral order:
  - Click **[Add files]** to upload clinical, demographic, and insurance documents.
  - The document **Type** will automatically populate as **External Carelink Document**.
  - If your uploaded file name does not clearly indicate what the document is, please type a brief description so the receiving team can easily identify contents.

Attach files:  **8**

100.0 MB Total Allowed 0 Files

Attach files:

|             |                            |             |                            |
|-------------|----------------------------|-------------|----------------------------|
|             | <b>Test Upload.pdf</b>     |             | <b>Test Upload 2.pdf</b>   |
| Type        | External Carelink Document | Type        | External Carelink Document |
| Description | Office Note                | Description | Demo/Ins                   |

364 KB (100.0 MB Allowed) 2 Files

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### Step 9: Finalize and Submit Orders

- Once the referral order is completed and supporting documentation attached, click **[Accept]**.
- If additional referral or radiology orders are needed, return to step four to begin a new order.
- After all necessary orders have been entered, click **[Sign Orders]** to finalize and submit them.

The screenshot shows the 'Order Entry' section of the CareLink system. At the top, there are tabs for 'Preference List' and 'Dx Association'. Below these is a search box labeled 'New procedure:'. The main area is divided into two sections: 'Unsigned new orders (1)' and 'Orders signed in this encounter (0)'. A red circle with the number '9' is overlaid on the 'Unsigned new orders (1)' section. Under this section, there is one order: 'AMB REFERRAL TO ORTHOPEDICS'. The order details are: 'Referral, COMM-ORTHOPEDICS - GREENVILLE, Routine', 'Order Authorization: NPR', 'Authorization start & end date: N/A', and 'Unable to lift arm without pain. No prior imaging performed.' At the bottom right, there are two buttons: 'Pend Orders' and 'Sign Orders'.

**Note:** Once order is signed, it will move to the “Orders signed in this encounter” section.

This screenshot shows the 'Order Entry' section after the order has been signed. The 'Unsigned new orders (0)' section now displays 'No unsigned orders'. The 'Orders signed in this encounter (1)' section now contains the signed order: 'AMB REFERRAL TO ORTHOPEDICS'. The order details are: 'Referral, Orthopaedic Surgery, COMM-ORTHOPEDICS - GREENVILLE, 1 visit, Routine', 'Order Authorization: NPR', 'Authorization start & end date: N/A', and 'Unable to lift arm without pain. No prior imaging performed.' At the bottom right, there is a link: 'Don't see the order you're looking for? Try [Order Review](#).'

## Other Helpful Information

### Cancelling a Referral Order

- CareLink users can cancel a referral order if the patient has not yet been scheduled. To do so:
  1. Click the **three dots** on the far right side of the patient's chart, **or** hover over the patient's name in the toolbar and select [**Order Review**].
  2. If the referral was entered within the last **7 days**, it should display automatically.
    - If it was entered **more than 7 days ago**, adjust the **From** date to locate it.
  3. Once the referral order appears, check the box on the **left** side of the line item.
  4. Click [**Cancel Orders**].
  5. Select the appropriate cancellation reason from the list to complete the process.

### Upload Records after Signing Referral Order

- To upload a document after signing a referral order, follow these steps:
  1. Click the **three dots** on the far right side of the patient's chart, **or** hover over the patient's name in the toolbar and select [**Referral by Member**].
  2. Locate the referral order and click the **Referral ID** on the left side of the line item.
  3. On the **Referral Details** screen, click [**Add Note/Attachment**].
    - Upload one document at a time.
    - In the large text box, type a note describing the document.
  4. Click [**Add Note**] to save.

### Checking Referral Status

- To check the status of a referral
  1. Click the **three dots** on the far right side of the patient's chart, **or** hover over the patient's name in the toolbar and select [**Referral by Member**].
  2. Locate the referral order and click the **Referral ID** on the left side of the line item.
  3. On the **Referral Details** screen under **Referral Information**, check:
    - **Referral Status** (e.g., Scheduled, Closed, Cancelled, Denied)
    - **Status Reason** for more context
  4. Under **Scheduling Info** section:
    - Look at the **Scheduling Status** to see progress.
    - If it says Scheduled, appointment details will appear at the bottom of the page.



Please contact the ECU Health Physician outreach team at [PhysicianOutreach@ecuhealth.org](mailto:PhysicianOutreach@ecuhealth.org) with any questions, issues, or concerns.