

Tip Sheet:**DSM- Incoming Referrals from External Community Providers using the "Add Referral" Button**

Incoming referrals from external (non-Banner) providers are received via Direct Secure Message (DSM) with attached records. These referrals are received in a Cerner pool message.

Prior to using the "Add Referral" button, Referral staff determine the patient's status and then either:

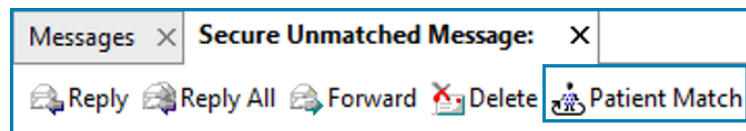
- New Patient- Register patient (including insurance) in RevCycle/MS4, OR
- Established Patient- verify & update demographics/insurance as needed

Incoming referral from external community provider received via Cerner Pool Message

- Choose Patient

Assigned	Priority	Patient Name	Subject	Create Date	Due Date	From	Provider	Status	To
Jamison, Darla...			XDM/1.0/DDM...	03/15/2023 09:31:44 MST		joanna.branum...		Pending	DirectMessage...
Rodriguez, Cla...			XDM/1.0/DDM ...	03/15/2023 08:55:11 MST		chima.nwizu.p...		Opened	DirectMessage...
Jamison, Darla...			XDM/1.0/DDM ...	03/14/2023 15:18:09 MST		donna.brogmu...		Opened	DirectMessage...
Jamison, Darla...			XDM/1.0/DDM ...	03/14/2023 14:25:38 MST		stacey.garber.p...		Opened	DirectMessage...

- Choose Patient Match



- From Pool message
- Choose the Add Referral button

Messages x Secure Message: x	
Reply Reply All Forward Delete Patient Match Print Add Referral Select Patient Previous Next Mark Unread	
Inbox View Summary View Launch Orders	
Age: 42 ye...DOB: [redacted] Gender: [redacted] Weight: [redacted]	MRN: 000002437556 Code Status: [redacted]
Language: [redacted] Allergies: Benadryl, morphine, sulfa drugs	PCP: NWIZU, NNENNA Advance Directive: [redacted]
From: nnenna.nwizu.p1@direct.fpgreely.nextgenshare.com Sent: 03/08/2023 10:47:02 MST Subject: XDM/1.0/DDM Originated Message To: DirectMessage.BMGSpecialtyReferrals Cc: [redacted]	
Caller: [redacted] Action: [redacted] Due: [redacted] Provider: [redacted] Document: Phone Message/Call	
90e1d879-a31a-48dd-a9ca-770ebb75b76e.XML Referral: Urology Banner -Urology Master Im b7f26304-	
.Air - Amb Run Sheet .Outside Records - Referral Documents .Patient Letter Appeals/Denials	

- Complete Case Details
 - Medical Service
 - Referral Reason
 - Referral Type
 - Refer from Provider
 - Referral Written Date
 - Refer to Provider
 - Refer to Location

- Priority

Add Referral - ZZZTEST, DAILEY AMBER 10/15/2000

1. Patient Information → 2. Documents/Case Details → 3. Finalize

Documents Case Details

*Medical Service

*Referral Reason

Codified Reason

Treatment to Date

Referral Type

Refer from Provider

Refer from Location

*Referral Written Date

Requested Start Date

Service By Date

*Refer to Provider

*Refer to Location

*Priority

Note: "Referral Type" and "Refer from provider" are not required fields, but are details needed to complete the referral process.

Referral Type field should reflect if referral was received via Fax or Direct Secure Message (DSM)

Referral Type

- Assume Care
- Clinic Testing
- Continuation of Care
- Evaluate and Treat
- Initial Consult w/ Option to FU
- DSM-Continuation of Care
- DSM-Evaluate and Treat
- Fax-Continuation of Care
- Fax-Evaluate and Treat

Refer From Provider field should reflect the external community provider that ordered the referral. If not found, enter "ExternalReferral, GenericProvider"

Provider Search

Search: external

Qualifiers:

☒ Include external practices

ExternalReferral, GenericProvider

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External to Health System

Referral Written Date field should be the date that the order was written by the external community provider. That may be different than the date we received it via fax or DSM.

- Use the calendar icon to the right of the field to enter the date

Refer to Provider field is the Banner receiving clinic or provider that the patient needs to see for care.

- Search for Provider or Practice
- Choose Accept

- Choose the Next button

Once submitted, referral will begin in a "Pending" status in the "Refer to" location worklist

- Choose Submit

The screenshot shows the 'Add Referral' form with three steps: 1. Patient Information, 2. Documents/Case Details, and 3. Finalize. The status is 'Pending'. There are buttons for 'Accept Referral', 'Reject Referral', 'Unassigned', 'Assign to me', and 'Assign'. The 'Case Details' section contains the following information:

Medical Service Gastroenterology	Referral Reason Patient needs colonoscopy --	Codified Reason --	Treatment to Date --	Referral Type Fax-Evaluate and Treat
Refer from Provider ExternalReferral, GenericProvider	Refer from Location External Referrals Site	Referral Written Date 03/08/2023	Requested Start Date --	Service By Date --
Refer to Provider --	Refer to Location BUMP DIGESTIVE INSTITUTE 1441	Priority Routine	Instructions to Staff --	Comment --

At the bottom, there are buttons for 'Previous', 'Next', 'Cancel', and 'Submit'.

Toggle back to DSM Pool Message. Update document type to reflect:

- .Outside Records- Referral Documents
- Choose Save to Chart

The screenshot shows a 'Secure Message' window. The message is from 'nnenna.nwizu.p1@direct.fpgreely.nextgenshare.com' with subject 'XDM/1.0/DDM Originated Message'. The message body contains the following text:

Entered by Rodriguez, Claudia on March 08, 2023 13:09:29 MST
Appt. 6/14/2023 and on stand by. Referral scanned in to chart and completed in ARM.

** Patient matched by [redacted] on 03/08/2023 11:35:43 MST **

Please find the attached XDM file.
Sent via Direct Messaging

At the bottom, there are buttons for 'Save', 'Save to Chart', 'Reject All', 'Accept All', and 'Accept All and Ne'. A dropdown menu is open, showing the following options:

- Phone Message/Call
- Air - Amb Run Sheet
- .Outside Records- Referral Documents**
- Patient Letter
- Appeals/Denials
- BHURD Communication
- CM Communication
- External Document (CCD)
- MDCC Communication
- Medication Management
- Payer Review
- Phone Message/Call
- Phone Msg
- Portal Communication
- Post-Acute COMPLEX Referral (TCN)
- Post-Acute FINAL Referral (TCN)

Note: It is very important to press "Save to Chart". This will ensure the attached referral documentation/medical records are saved in the HIMS hierarchy of .Outside Records- Referral Documentation.

Once the message has been saved, this icon will appear in the lower left corner



- Access Referral Management Receiving Worklist

Referral Management X

Referral Management X Patient-Centric Referrals X +

Worklist R: Pending/Accepted/Reschedule [Refresh] [List Maintenance]

Patient	I...	Insurance	Referred By	Request
ZZZTEST, DAILEY AMBER DOB: OCT 15, 2000	[Flag]	SELF PAY HIPAA PROT...	ExternalReferral, Generic... 03/13/2023 00:00	Gastro TEST

- Open referral
- Choose Accept

ZZZTEST, DAILEY AMBER
22 yrs Female DOB: OCT 15, 2000 MRN: 41592887

Please Accept or Reject the referral. [Accept] [Reject]

Status: **Pending** [Edit]
Substatus: -- [Edit]

Unassigned Assign to me Assign
High Priority Case Number: 45267985

- Toggle to Insurance tab
- Highlight insurance
- Choose the Associate button

ZZZTEST, DAILEY AMBER
22 yrs Female DOB: OCT 15, 2000 MRN: 41592887

Status: **Accepted** [Edit]
Substatus: -- [Edit]

Unassigned Assign to me Assign
High Priority Case Number: 45267985

Summary Comments Documents **Insurance** Scheduling

Insurance Information

Asso...	Seq	Health Plan	Payer	Financial Class	Subscriber	Member Num...	Group Number	Begin	End
	1	SELF PAY HI...	SELF PAY HI...	Self Pay	ZZZTEST, DA...	--	--	04/29/2022	--

You can associate a health plan to the referral by highlighting a health plan in the table and clicking the 'Associate' button. [Associate]

- Choose the Edit button and complete the Authorization section with applicable referral/auth details and begin/end date of referral

Insurance Information

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You can associate a health plan to the referral by highlighting a health plan in the table and clicking the 'Associate' button. [Associate]

Authorization [Edit]

Authorization Number	Authorization Type	Authorization Status	Number Authorized	Begin Date
--	--	--	--	--

End Date Contact Name Contact Phone

Note: If your practice bills through RevCycle, anything in the Authorization Number field will transfer over to the patient registration screen.

Referral will now be worked through the ARM tool following Banner's Receiving Referral Workflow