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# REFERRAL MANAGEMENT

USER GUIDE

FULFILLER



EQUIPO HEALTH INC

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## EQUIPO REFERRAL MANAGEMENT – Introduction

Equipo's Referral Management Process makes referrals EASY by creating automated workflow adapted to the Partner Provider's need. The platform empowers receiving partner providers (Order Fulfillers) to improve efficiency, eliminate redundancy, and communicate effectively, thus saving time and effort. Backed by strong analytics and AI, the turnaround times can be significantly improved. Outcomes can be measured in terms of reduced no shows, drop in rejections, improved resource allocation and faster appointments.

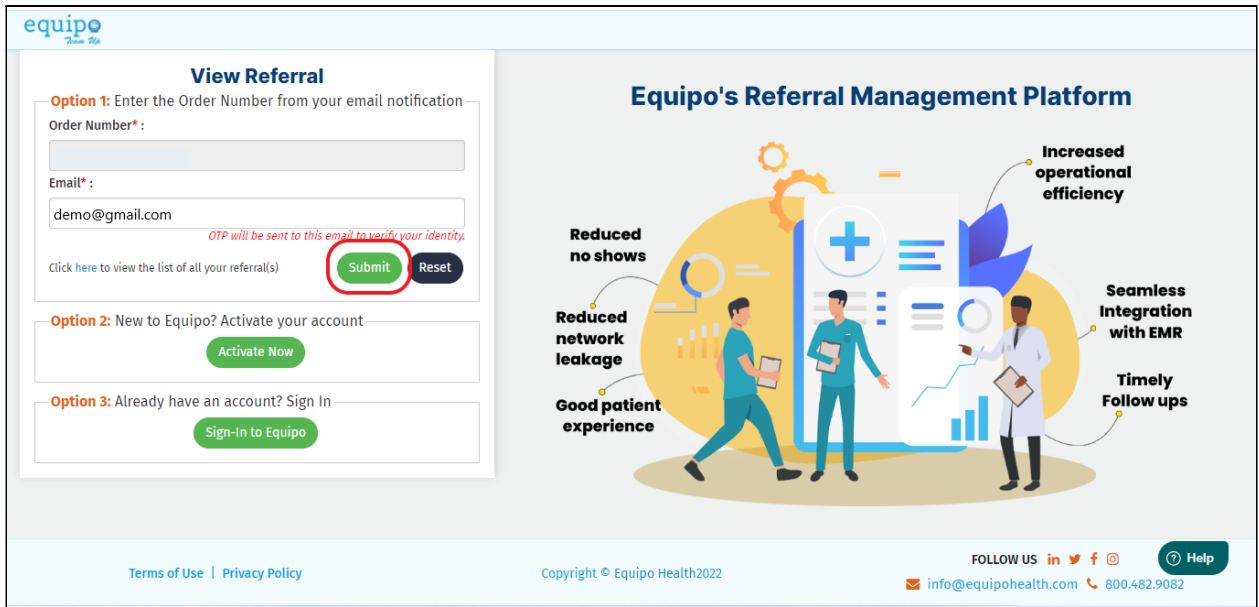
### A. Login

To login to Referral Lite, you must have received an email notification for the Order received. Please click on the View Referral button on the email received. If you do not find the email in your Inbox please do not forget to check your spam folder.

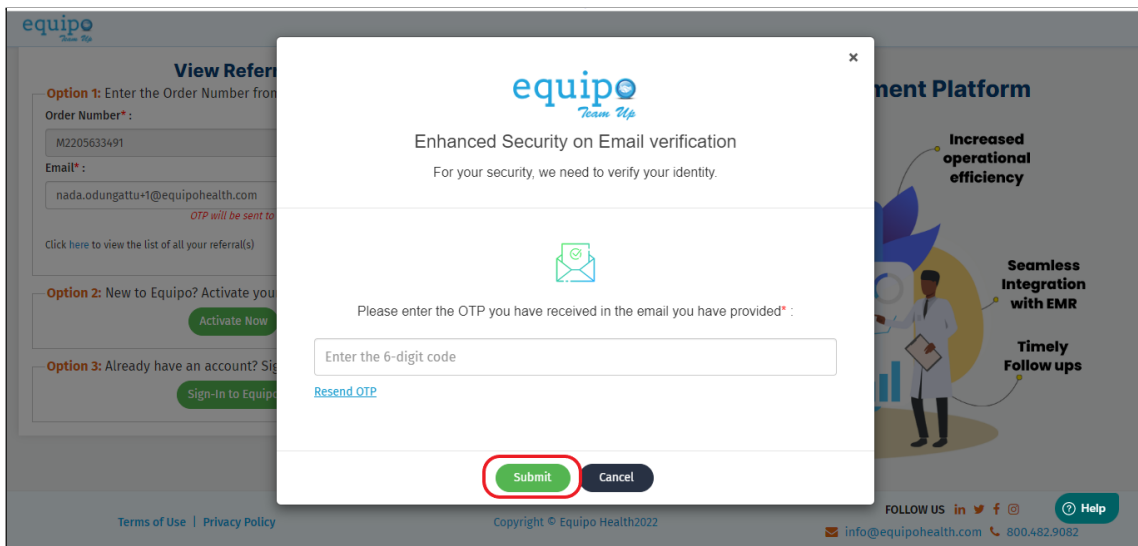
To view the Referral Order, there are three options available.

#### **Option 1: View Referral**

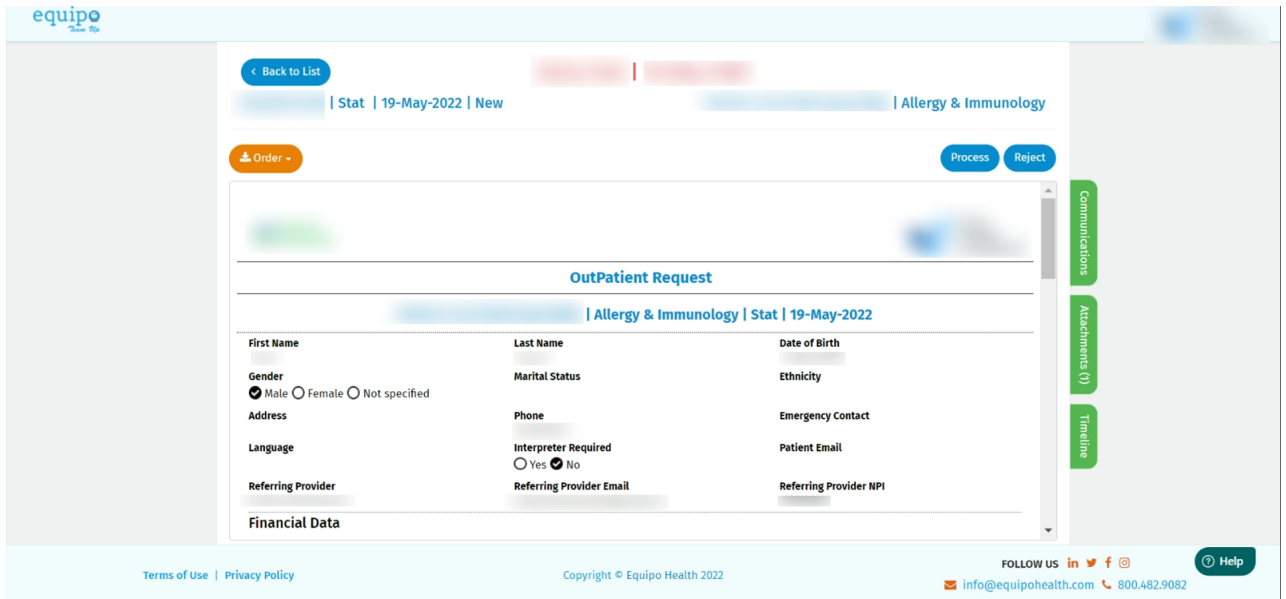
- 1) Enter the order number received in your email notification and click the submit button. Your email id will be already displayed as shown in the following screen.



2) You will now be prompted to enter an OTP for verification. Enter the OTP sent to your email. Click on the submit button as shown in the following screen.

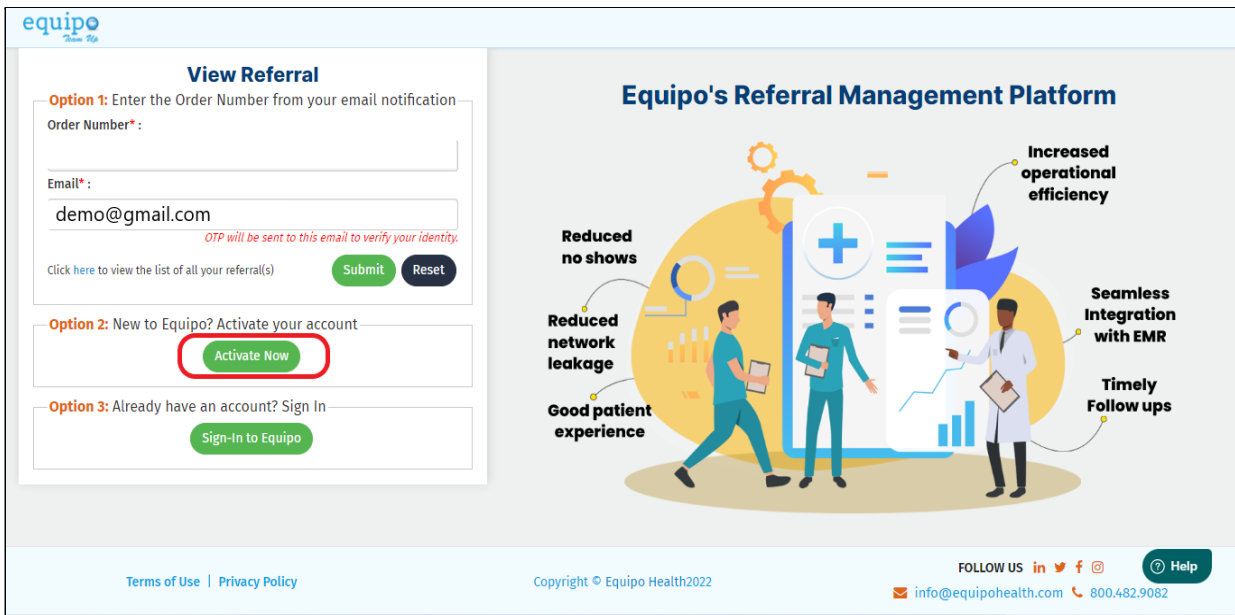


- 3) After clicking the submit button you will be redirected to view the referral order.

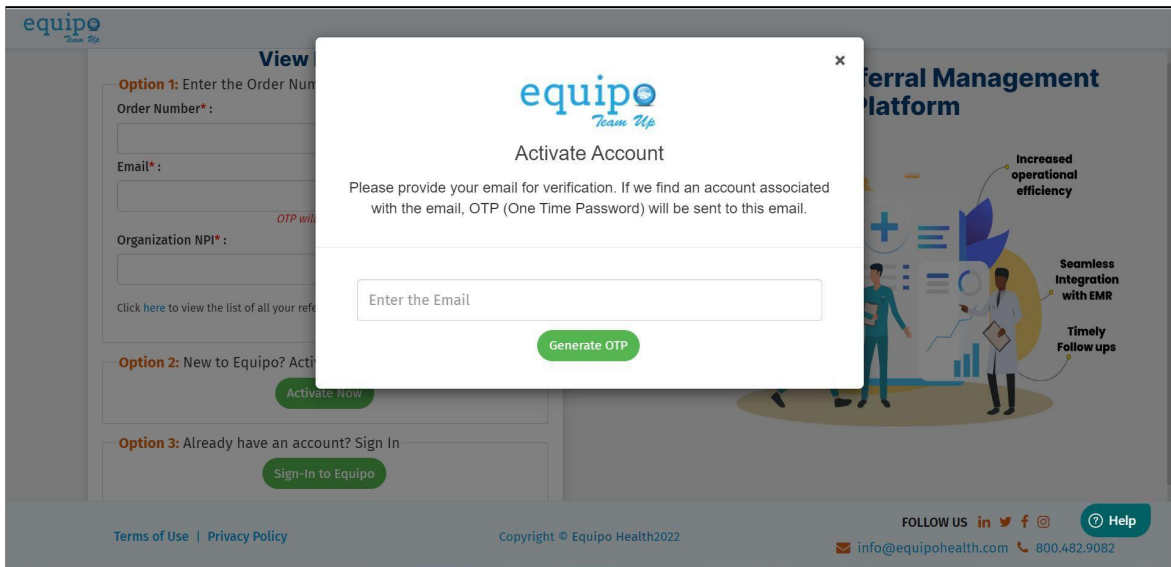


## Option 2: Activate your Equipo Account

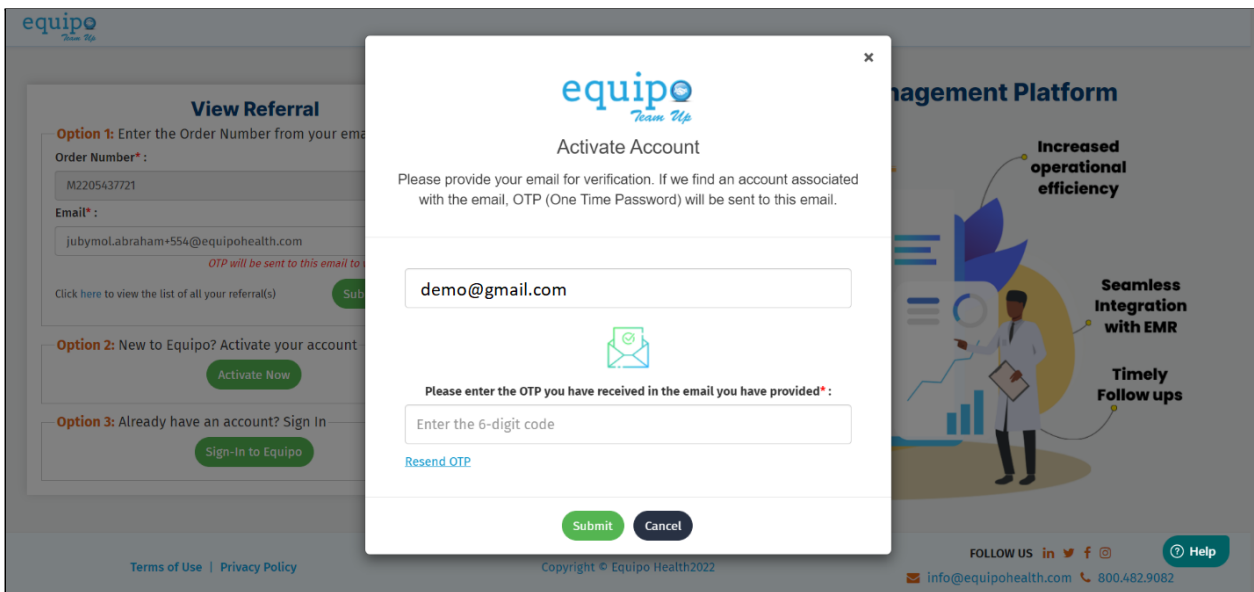
- 1) Click “Activate Now” as shown in the following screen:



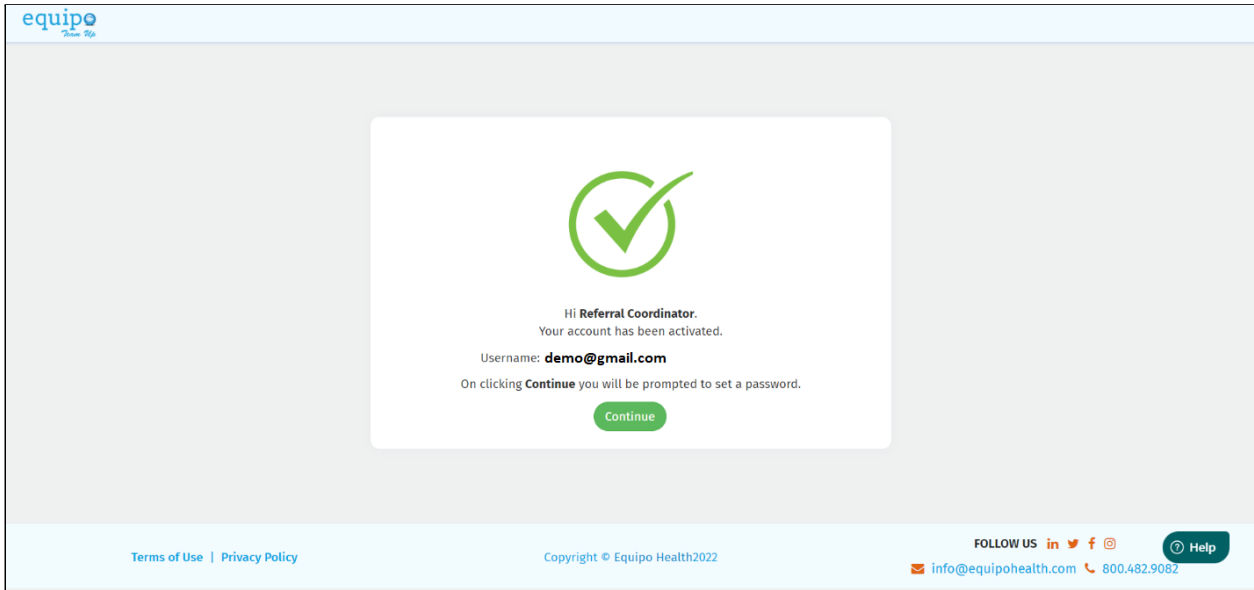
2) You will now be prompted to enter your email address. By clicking the “Generate OTP” button OTP will be generated.



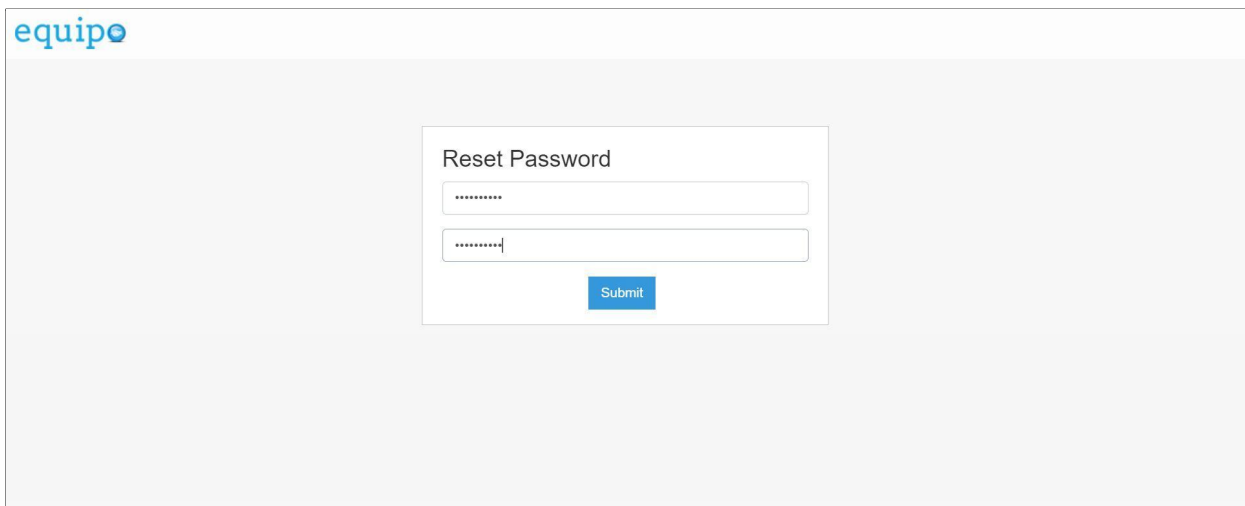
3) You'll now have received an OTP in the email provided. Enter the OTP and click “Submit”



4) Your account is now Activated. Please note down your username at this point which can be used for login later on. Then, click on Continue to set your password.



5) Your new password must contain Alphabets and Numerals

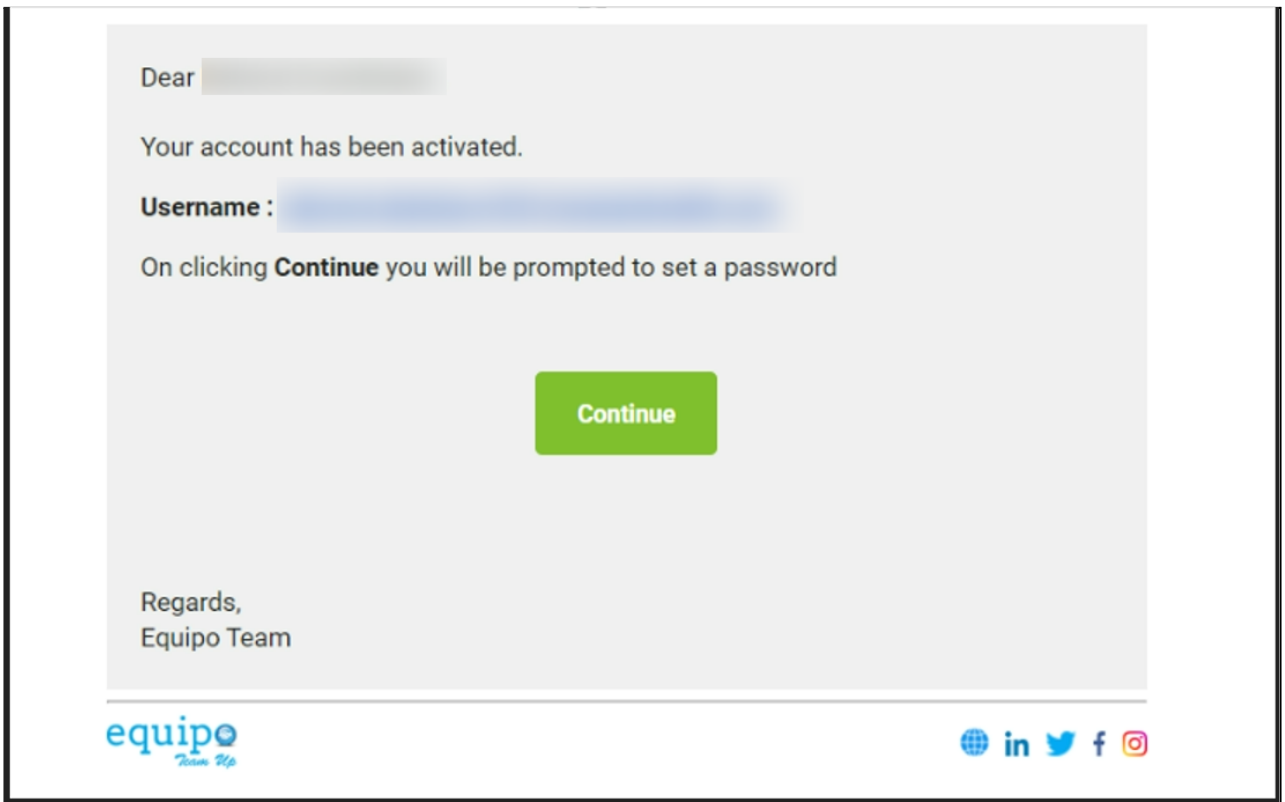


This completes your account setup procedure. You will be redirected to the login screen of Equipo.

6) You can now login to Equipo using the username that you had received

and the password that you created for your account.

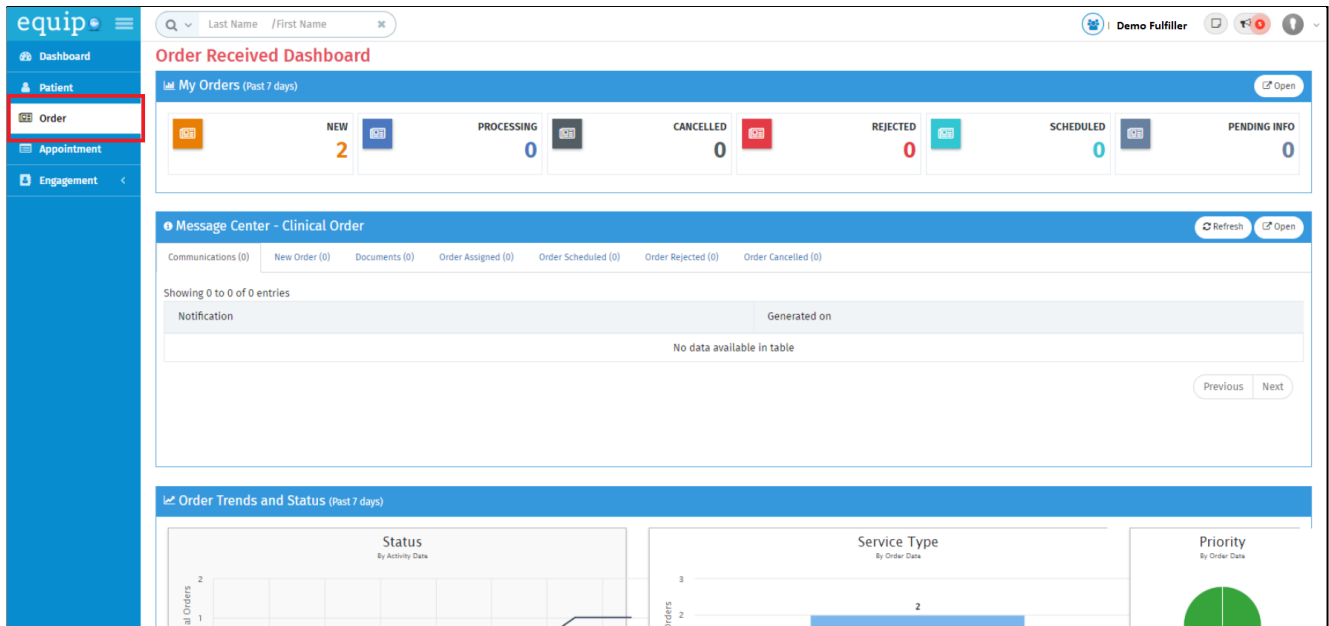
7) Alternatively, you will receive an email from Equipo with your Username and a link to set your password. Click on “Continue” to set a new password of your choice.



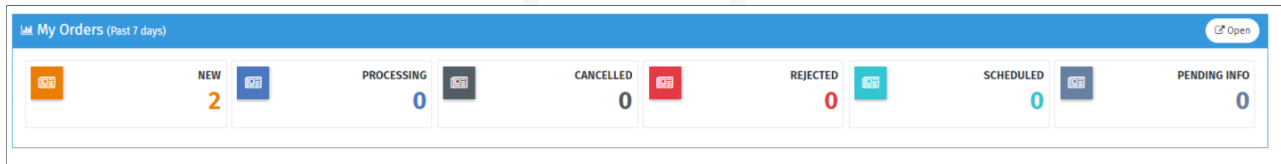
## B. Order Menu and Dashboard

Once logged in, the Fulfiller will be directed to the Order Dashboard. Dashboard provides a summary view and metrics of the orders for last 7 days





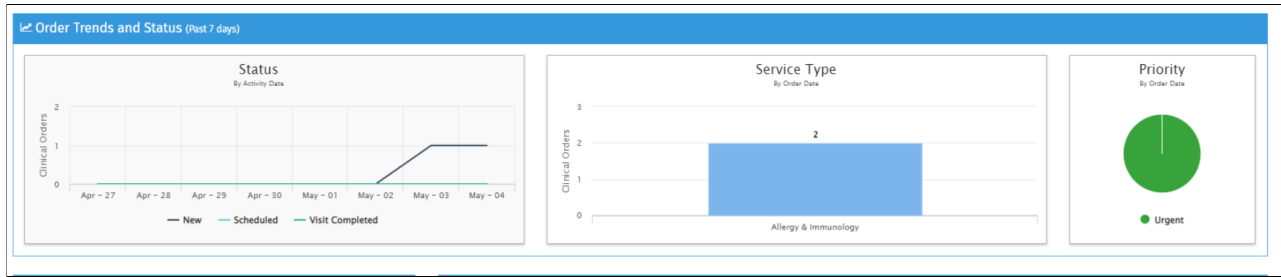
## a. Order Statistics – (Total Counts for the Last 7 Days)



- Shows the current standing of all the orders placed in the last 7 days grouped by respective order status.
- Clicking on the counts will take you to the listing page of the orders.
- Clicking on the 'Open' button at the right-hand corner will take you to the listing page.

## b. Order Trends and Status

The list shows the referring organization, and the count represents the number of orders received in the last 7 days.



- Quick view of the daily trend of the orders.
- Distribution of the orders by Specialty.
- Distribution of the orders by Priority.

### c. My Care Providers (Partner Referring Organizations)

**My Care Providers**

- 2 Equipo Health

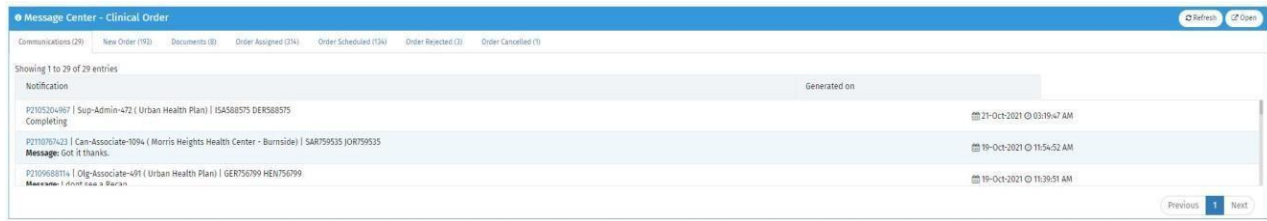
**My Order Forms**

Title	Description	Last Modified	Action
Referral :	Consultation Request	01-Sep-2021 09:12 AM	👁

2022 © Equipo | Build V.

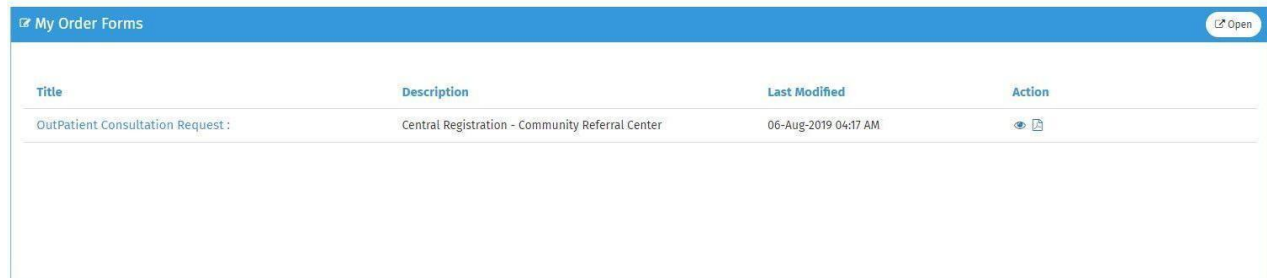
### d. Message Center (Referral Inbox)

Changes in the order status are updated here (in real-time), including notifications for Rejected and Canceled orders, this section works as a mailbox, once the notification is read, it will be removed. Updated physician note is also listed here for quick access as needed.



## e. My Order Forms

Displays the order forms (electronic order forms) that you have configured and made available to your partner referring organizations. Multiple forms can be created based on service lines. These forms will be used by the Referrer to send electronic referral orders.



## A. Order Listing

'My Orders' is the listing page that displays all the orders. Multiple filters can be applied – Sending Partner, Priority, Order Type and Date Range.

My Clinical Orders - Sent

+ Clinical Order

Select Facility ▾

Referred To ▾

Select Priority ▾

Select Order Type ▾

Select Assignee ▾

February 26, 2022 - April 12, 2022

🔍 ↻ 📄 ⬇

All

Draft

New

Processing

Cancelled

Rejected

Scheduled

Visit Completed

No Show

Closed

Showing 1 to 50 of 57 entries

Show Pending Info

Select Tag ▾

Search Name / Order No / MRN ✕

Order Number	Patient	MRN	Priority	Referred From	Type	Referred By	Assignee	Order Date	Last Modified Date	ETA	
P210529782	LOR728640 RAM728640		Stat		Ophthalmology	Jai-Physician-752		23-May-2021	25-Oct-2021 08:49 AM	26-Oct-2021	<input type="checkbox"/>
P210204967	<span style="background-color: yellow;">LAD78525 DRK58825</span>	1066603	Routine		Pediatric Gastroenterology	Stu-Physician-742	Eri-Senior Associate-525	27-May-2021	22-Oct-2021 05:59 AM	17-Nov-2021	<input type="checkbox"/>
P2108126772	ELL69728 BER697728	02780647	Routine		Gastroenterology	Ric-Physician-893		10-Aug-2021	19-Oct-2021 04:09 PM	18-Nov-2021	<input type="checkbox"/>
M2108075351	ldr738529 Ala738529	10523869	Urgent		Nephrology	Mar-Physician-1285	Eri-Senior Associate-525	11-Aug-2021	19-Oct-2021 08:53 AM	02-Nov-2021	<input type="checkbox"/>
P2109723918	KAT753931 GOU753931		Routine		Dermatology	Tem-Physician-3165	Eri-Senior Associate-525	07-Sep-2021	18-Oct-2021 09:51 AM	16-Nov-2021	<input type="checkbox"/>
P2109698318	BAB754168 CEE754168		Routine		Cardiology	She-Physician-601	Xia-Associate-914	10-Sep-2021	11-Oct-2021 12:44 PM	05-Nov-2021	<input type="checkbox"/>
M2109578545	<span style="background-color: yellow;">DAN754151 MAR754151</span>	10734011	Urgent		Pediatric Ophthalmology	Ann-Physician-1304	Jac-Senior Associate-1044	17-Sep-2021	17-Sep-2021 02:13 PM	02-Oct-2021	<input type="checkbox"/>
M2109832841	<span style="background-color: yellow;">Rob754157 Sam754157</span>	10557234	Urgent		Pediatric Cardiology	Fra-Physician-2670	Chr-Associate-1032	17-Sep-2021	28-Sep-2021 08:46 AM	12-Oct-2021	<input type="checkbox"/>
P2109941816	<span style="background-color: yellow;">CEB754168 ABZ754168</span>	10734546	Routine		Pediatric Gastroenterology	Gin-Physician-621	Eri-Senior Associate-525	19-Sep-2021	19-Oct-2021 08:53 AM	17-Nov-2021	<input type="checkbox"/>
P2109033422	VAN754109 CEP754109	10732851	Urgent		Pediatric Cardiology	Gin-Physician-621	Chr-Associate-1032	20-Sep-2021	23-Sep-2021 07:45 AM	07-Oct-2021	<input type="checkbox"/>
P2109678009	VAN754109 CEP754109	10732851	Urgent		Pediatric Cardiology	Gin-Physician-621	Chr-Associate-1032	20-Sep-2021	23-Sep-2021 07:45 AM	07-Oct-2021	<input type="checkbox"/>
P2109546008	NOE657237 RO5657237	03456289	Routine		General Surgery	Bar-Physician-1458	Day-Associate-1225	23-Sep-2021	28-Sep-2021 10:56 AM	23-Oct-2021	<input type="checkbox"/>
M210916702	Luc755971 Lom755971	10108520	Routine		Oncology	Mic-Physician-1302	Day-Associate-1225	23-Sep-2021	28-Sep-2021 10:56 AM	23-Oct-2021	<input type="checkbox"/>
L2109385795	Tax643699 Bre643699	02432548	Routine		Hematology	Gur-Physician-1170	Day-Associate-1225	23-Sep-2021	28-Sep-2021 10:56 AM	23-Oct-2021	<input type="checkbox"/>

Previous 1 2 3 4 5 6 Next

- Navigate to orders in various statuses.
- Search orders by applying filter criteria.
- Click on the order number to go to the order details page.
- Click on the patient's name to go to the patient chart.
- User in 'Supervisor Role' can assign associates. Bulk assign can be done by clicking the 'Select All' button or by selecting two or more orders from the list.

When two or more orders are selected, "choose action" button is enabled. Under the drop down for 'choose action', we could select 'assign' / 'unassign' (ie; bulk assign/unassign) for orders.

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Referral Management

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Showing 1 to 40 of 40 entries

Order Number	Patient	Priority	Referred To	Type	Referred By	Assignee	Order Date	Last Modified Date	Reason For Draft	✓
I2203491175	Luis Casb. MRN	Routine	System	Not Specified	-	Eun-Senior Associate-1391	09-Mar-2022	09-Mar-2022 09:20 AM	-	✓
I2203128981	Laf683842 Bro6831442 MRN	Routine	System	Not Specified	-	Eun-Senior Associate-1391	09-Mar-2022	09-Mar-2022 09:34 AM	-	✓
I2203837569	Mar7 Sol7A MRI	Routine	System	Not Specified	-	Eun-Senior Associate-1391	09-Mar-2022	09-Mar-2022 03:14 PM	-	✓

Select Facility | Referred To | Select Priority | Select Order Type | Select Assignee | February 26, 2022 - April 12, 2022

All | Draft | New | Processing | Cancelled | Rejected | Scheduled | Visit Completed | No Show | Closed

Showing 1 to 40 of 40 entries

Order Number	Patient	Priority	Referred To	Type	Referred By	Assignee	Order Date	Last Modified Date	Reason For Draft	✓
[Table content is partially obscured by a red box highlighting the 'Choose an Action' dropdown menu]										

## a. Filters

- Orders by the Referring Organization (Referrer)

**My Clinical Orders - Sent** + Clinical Order

Select Facility | Referred To | Select Priority | Select Order Type | Select Assignee | February 26, 2022 - April 12, 2022

All | Draft | New | Processing | Cancelled | Rejected | Scheduled | Visit Completed | No Show | Closed

Select Facility  
Demo Facility - 448  
Demo Facility - 769

Showing 1 to 40 of 40 entries

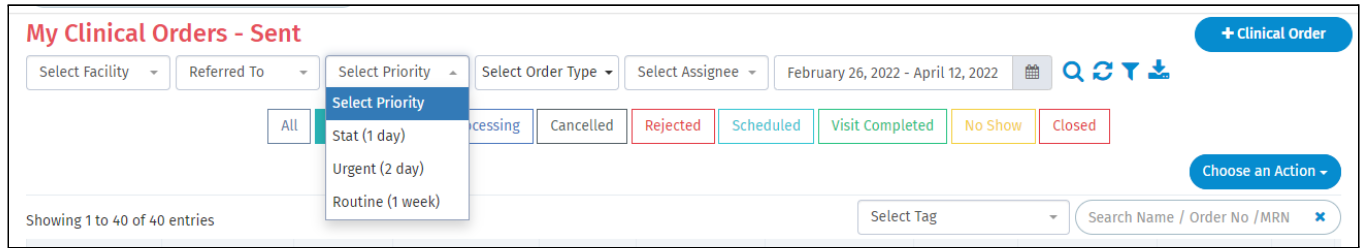
Select Tag | Search Name / Order No / MRN

- Filter Orders by Priority

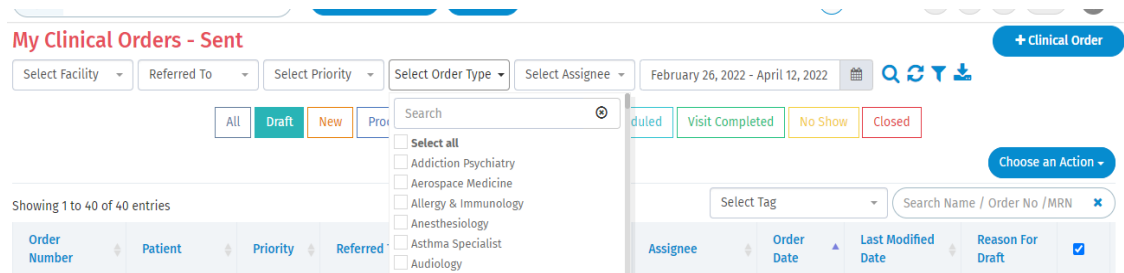
Stat (1 day) – within 1 day the order has to be processed.

Urgent (2 day) - within 2 days the order has to be processed.

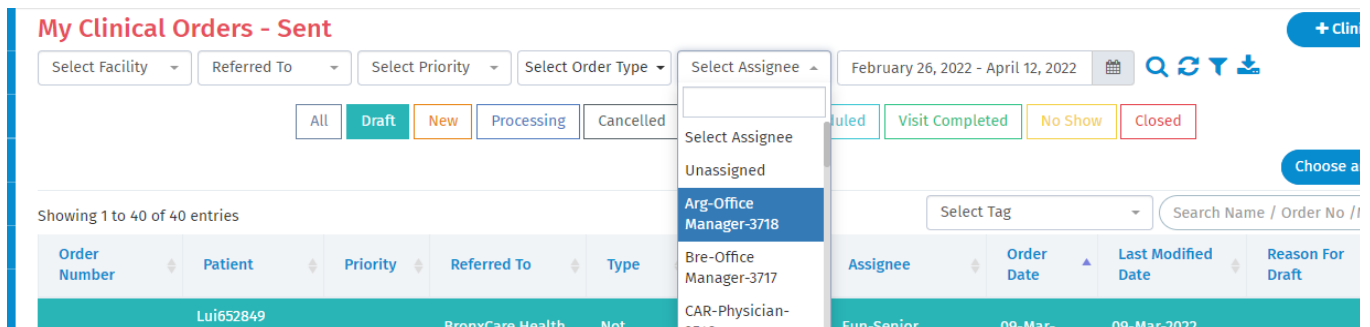
Routine (1 week) - within 1 week the order has to be processed.



- Filter Order by Order Type / Service Line



- Filter Order by Assignee



## You can also filter by “Unassigned”

- Filter by date range (of Order Date)

**Clinical Orders - Sent**

Select Facility | Referred To | Select Priority | Select Order Type | Select Assignee | February 26, 2022 - April 12, 2022

All Draft New Processing Cancelled Rejected Scheduled Visit Closed

Showing 1 to 40 of 40 entries

Order Number	Patient	Priority	Referred To	Type	Referred By	Assignee	Last Modified Date	Reason For Draft
2203491175	Lui652849 Cas652849 MRN: 91173072	Routine	BronxCare Health System	Not Specified	-	Eun-Senior Associate-13	Mar-2022 10:00 AM	✓
Lat683842			BronxCare Health	Not		Eun-Senior	Mar-2022	

You also have option to filter “Future” orders

**BY CLICKING ON THE ORDER NUMBER, ORDER DETAILS CAN BE VIEWED**

## B. Order Details

View the details of the electronic order and take actions.

**My Clinical Orders - Received**

Select Facil... | Select Sen... | Select Prior... | Select Order ... | Select Assi... | April 27, 2022 - May 04, 2022

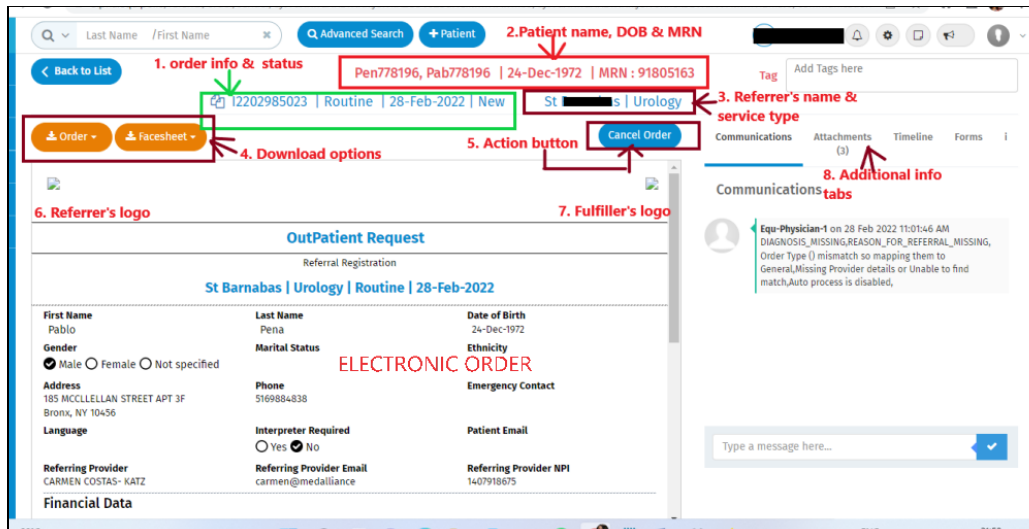
All New Processing Cancelled Rejected Scheduled Visit Completed No Show Closed

Showing 1 to 2 of 2 entries

Order Number	Patient	Priority	Referred From	Type	Referred By	Rendering Provider	Assignee	Order Date	Last Modified Date	ETA
M2205095053	Test Patient George	Urgent	Equipo Health	Allergy & Immunology	Test Referring Physician	Demo Lite Facility	-	03-May-2022	03-May-2022 06:52 AM	05-May-2022
M2205398623	June Mathew	Urgent	Equipo Health Equipo Hospital	Allergy & Immunology	CLAUDIA GONZALEZ	Lite Senior Associate Demo Lite Facility	-	04-May-2022	04-May-2022 06:34 AM	06-May-2022

Previous 1 Next

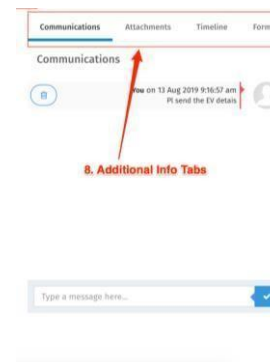
2022 © Equipo | Build V.



All action buttons are indicated in 'blue'. All download buttons are indicated in 'orange', in the above screenshot.

The left section displays the electronic order and the right section provides additional information regarding the order.

OutPatient Consultation Request		
Central Registration - Community Referral Center		
Demo Sender 1   Neurology   Routine   16-Jul-19		
First Name PABLO	Last Name CESPEDES	Date of Birth 10-Jan-1938
Gender <input checked="" type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Not specified	Marital Status Not Specified	
Address 1339 BRISTOW STREET 1C BRONX NY, 10459 ,	Phone 7183281022	Emergency Contact 7183281022
Language Spanish	Interpreter Required <input type="radio"/> Yes <input checked="" type="radio"/> No	Patient Email no-email@ccnmedicine.com
Referring Provider Cecilia G Calderon	Referring Provider Email calderon@ccnmedicine.com	Referring Provider NPI
Insurance Company	Policy Number	Policy Holder Name
Pro Auth		



## C. Order Lifecycle

Orders submitted by the Referrer appear under 'New'.



## My Clinical Orders - Sent

+ Clinical Order

Select Facility | Referred To | Select Priority | Select Order Type | Select Assignee | February 26, 2022 - April 12, 2022 | Search | Refresh | Print | Download

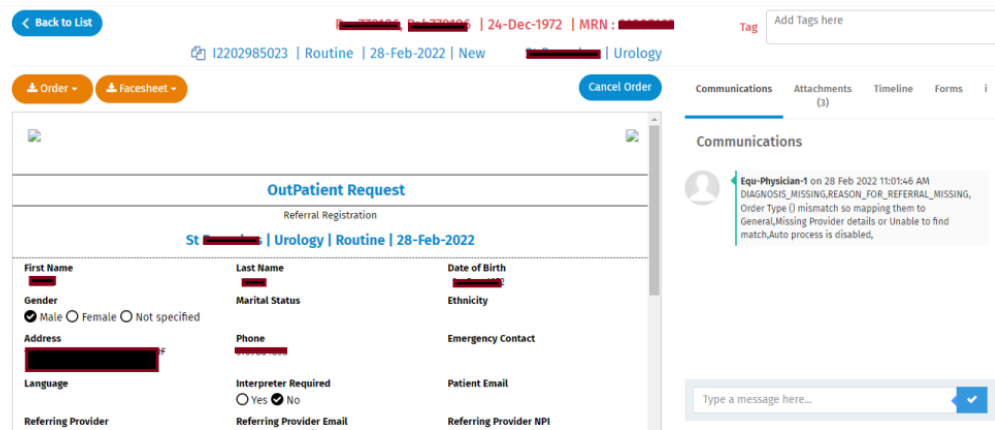
- All
- Draft
- New
- Processing
- Cancelled
- Rejected
- Scheduled
- Visit Completed
- No Show
- Closed

Each order goes through one of the following life cycles:

- New –Processing – Scheduled – Order Scheduled
- New – Processing – Scheduled – Visit completed or No Show
- New – Rejected (Patient Not Found/Insurance Not Covered/Service Not Provided)
- New –Processing – Rejected (Patient Rejects Appointment)
- New – Reject (Insurance Not Covered/Service Not Provided)

### a. Order Lifecycle - New

- i. By clicking on the order number of a 'New' order, the details can be viewed. Any additional info like supporting documents can be viewed under the Attachments tab.
- ii. New order can be canceled. Based on the selected action, order will be moved to the next level.



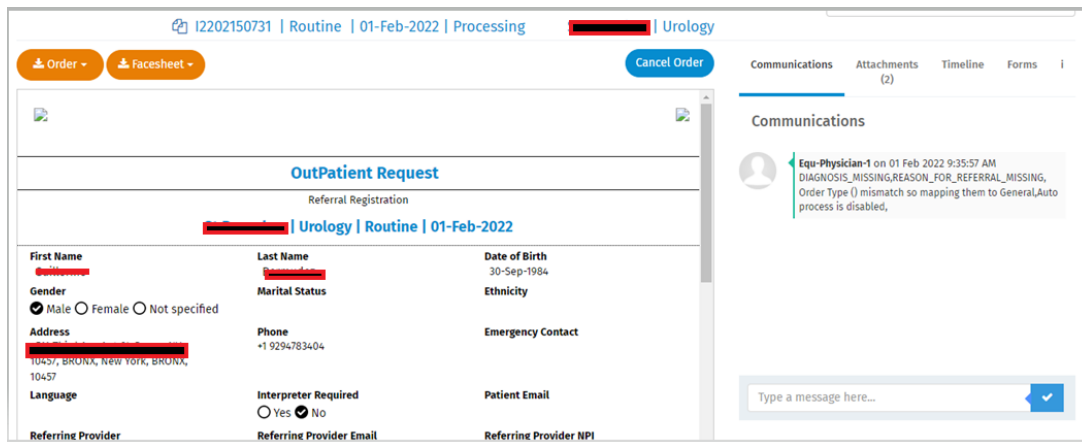
## Key Features

- a. A PDF or TIFF file of the order can be downloaded any time.

- b. Communication between the Referrer and the Fulfiller can be performed any time.
- c. Forms and Attachments can be added to the order any time.

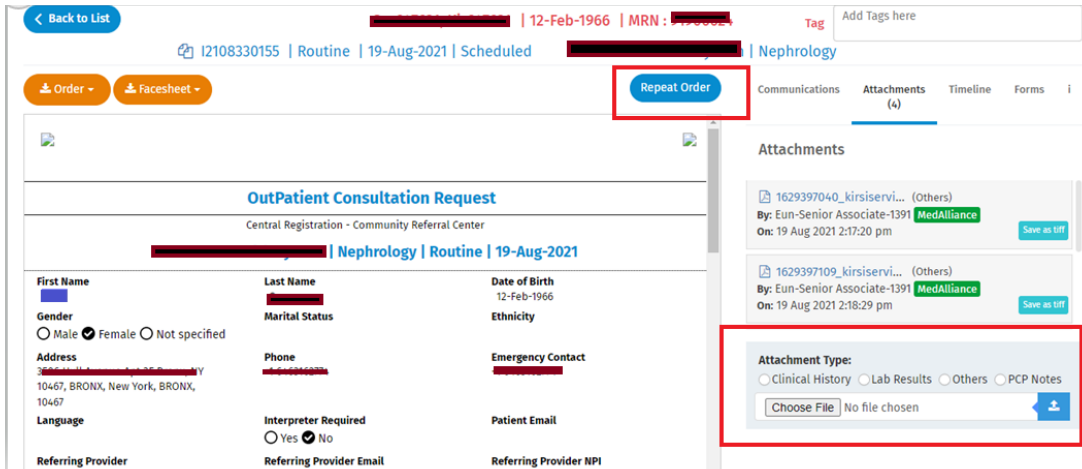
**b. Order Lifecycle - Processing**

A processing order can be Scheduled or canceled.

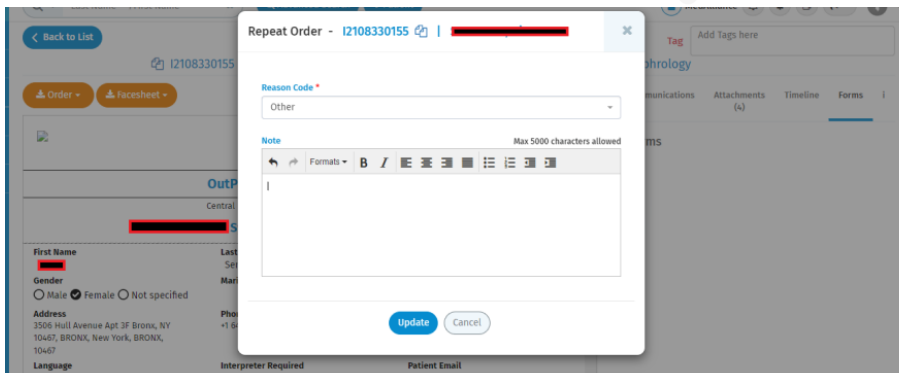


**c. Order Lifecycle - Scheduled**

- i. On Scheduled action, additional attachments like 'clinical history', 'lab results', 'PCP notes' etc can be uploaded.

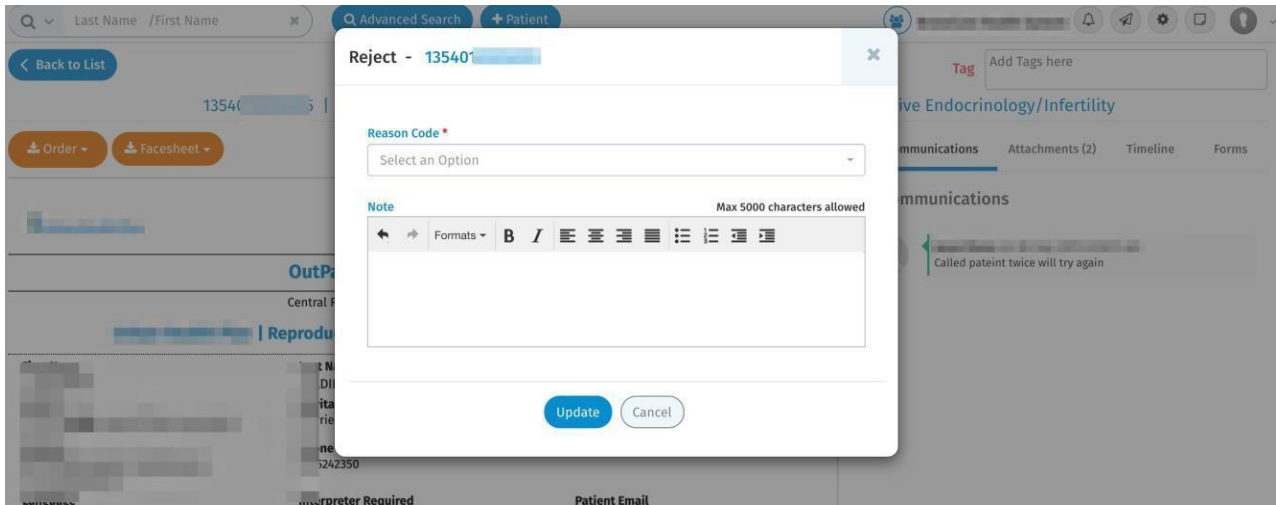


- ii. We can also, repeat the same order for a different date using 'Repeat Order'



## d. Order Lifecycle – Rejected

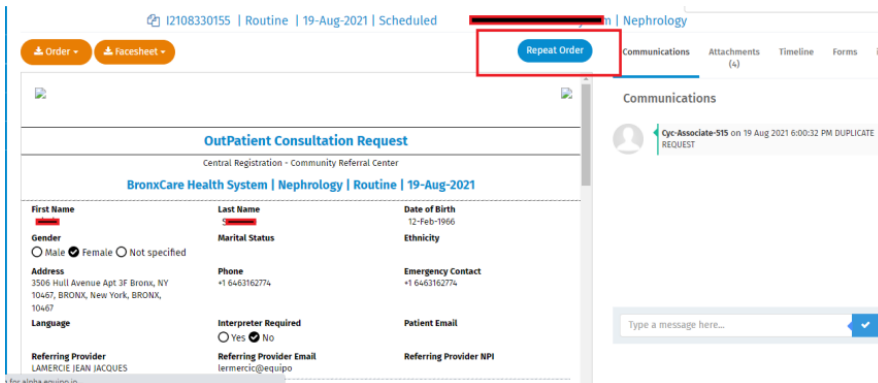
Order can be Rejected. Reason Code can be selected from the drop-down for proper documentation.



**e. Order Lifecycle – Scheduled**

- i. Once Scheduled with attachments and comments, order will be moved the Scheduled status.

Order can also be repeated through 'Repeat Order'.

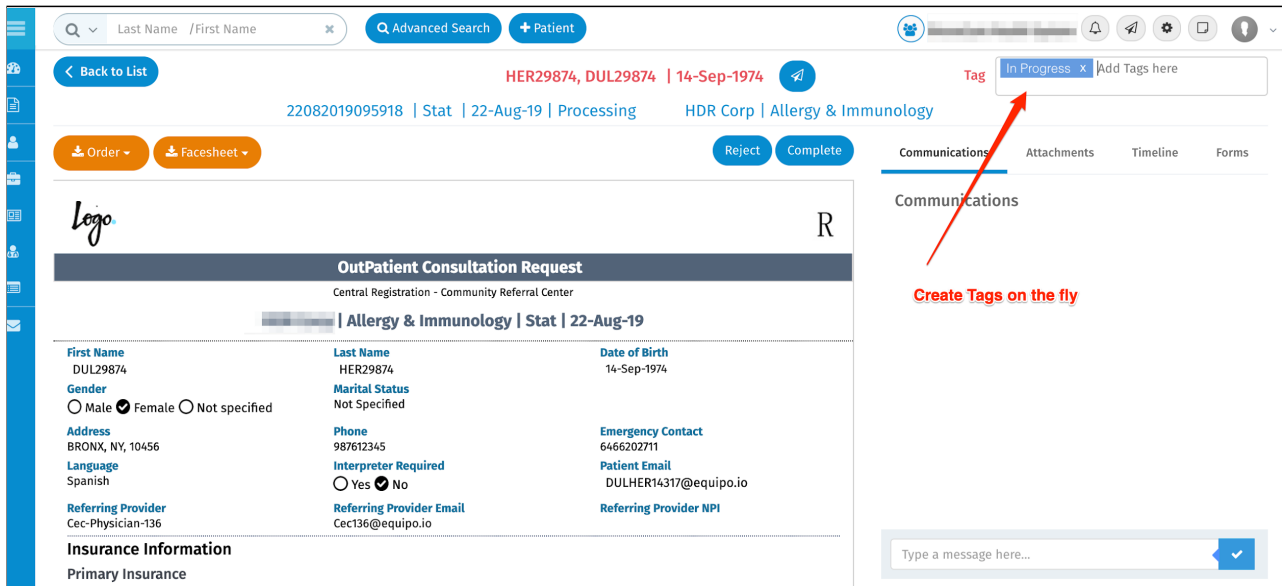


**f. Order Lifecycle – Visit Completed or No-Show**

- i. Fulfiller will update the order to No-Show or Order Complete based on the visit status
- ii. A physician note needs to be uploaded if the order is moved to the Completed state.
- iii. No Show orders can be scheduled again.

## D. Tag Orders

Tagging is a powerful feature in Equipo Referral Management. Orders can be tagged by creating custom tags or by picking an existing tag.



HER29874, DUL29874 | 14-Sep-1974

22082019095918 | Stat | 22-Aug-19 | Processing | HDR Corp | Allergy & Immunology

Order Facesheet Reject Complete

Communications Attachments Timeline Forms

**OutPatient Consultation Request**

Central Registration - Community Referral Center

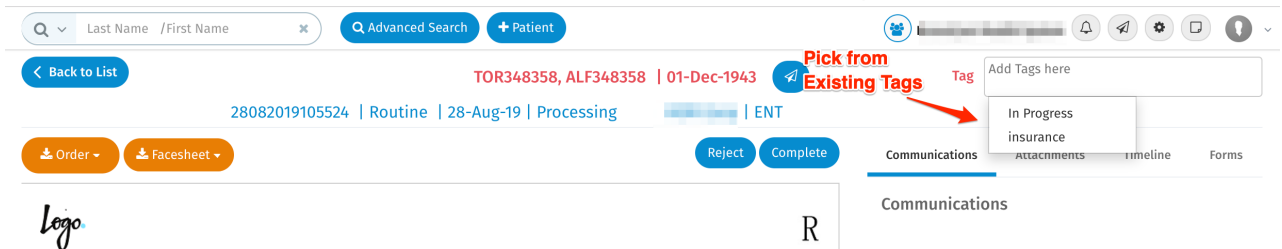
██████████ | Allergy & Immunology | Stat | 22-Aug-19

<b>First Name</b> DUL29874	<b>Last Name</b> HER29874	<b>Date of Birth</b> 14-Sep-1974
<b>Gender</b> <input type="radio"/> Male <input checked="" type="radio"/> Female <input type="radio"/> Not specified	<b>Marital Status</b> Not Specified	
<b>Address</b> BRONX, NY, 10456	<b>Phone</b> 987612345	<b>Emergency Contact</b> 6466202711
<b>Language</b> Spanish	<b>Interpreter Required</b> <input type="radio"/> Yes <input checked="" type="radio"/> No	<b>Patient Email</b> DULHER14317@equipo.io
<b>Referring Provider</b> Cec-Physician-136	<b>Referring Provider Email</b> Cec136@equipo.io	<b>Referring Provider NPI</b>

**Insurance Information**  
Primary Insurance

Tag: In Progress x Add Tags here

Create Tags on the fly



TOR348358, ALF348358 | 01-Dec-1943

28082019105524 | Routine | 28-Aug-19 | Processing | ██████████ | ENT

Order Facesheet Reject Complete

Communications Attachments Timeline Forms

**OutPatient Consultation Request**

Central Registration - Community Referral Center

██████████ | ENT | Stat | 28-Aug-19

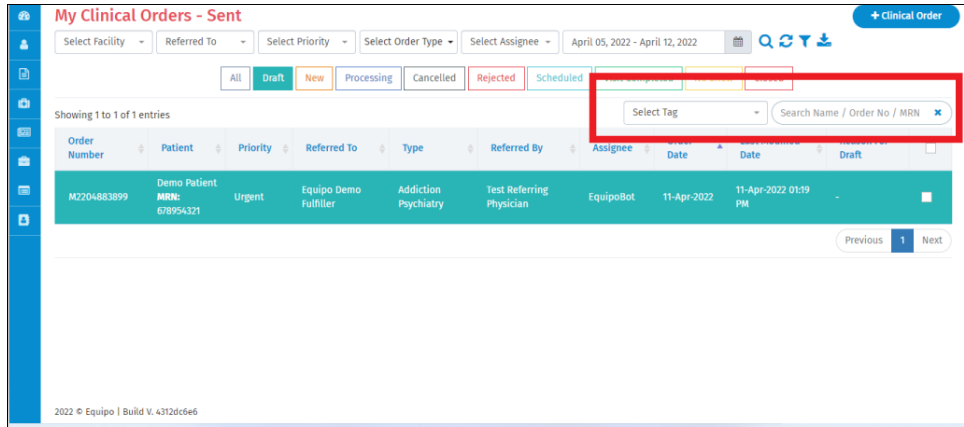
Tag: Add Tags here

Pick from Existing Tags

In Progress  
insurance

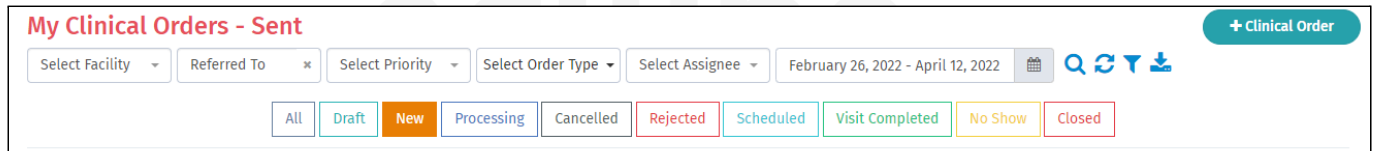
## E. Search Orders

Orders can be searched by Name, Order No or MRN



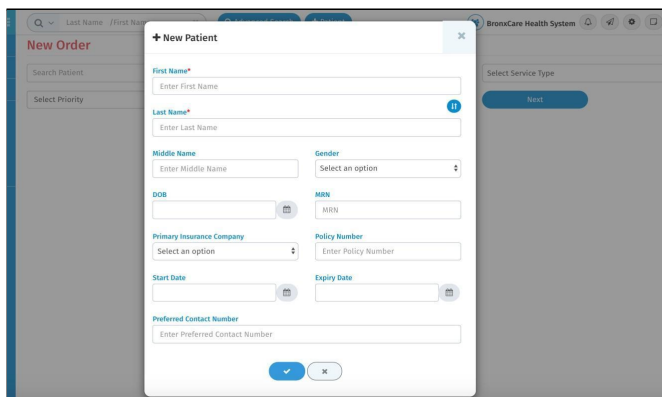
## F. NEW Order Creation 'On Behalf Of' Partner

- i. Click on the +Order button



- ii. Search for the Patient or Create the Patient.

Provide details like Name, DOB, Insurance, MRN



iii. Select Service Type, Priority, Referred by provider, Referred to

**New Clinical Order**

**Referral Info**

<p><b>Patient</b> :* <input type="text" value="Search Patient"/> <input type="button" value="Q"/> <input type="button" value="+"/></p> <p><b>Referred From</b> : <input type="text" value="MedAlliance"/></p> <p><b>Referred By Provider</b> :* <input type="text" value="Referring Provider"/></p> <p><b>Referred From Facility</b> : <input type="text" value="Select Facility"/></p> <p><b>Priority</b> :* <input type="text" value="Select Priority"/></p>	<p><b>Service Type</b> :* <input type="text" value="Select Service Type"/></p> <p><b>Referred To</b> :* <input type="text" value="Referred To"/> <input type="button" value="Find Now"/></p> <p><b>Referred To Facility</b> : <input type="text" value="Select Facility"/></p> <p><b>Referred To Physician</b> : <input type="text" value="Referred To Physician"/></p>
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Clicking 'Save and Next' will display the Order form. Please complete the necessary details

I2202985023 | Routine | 28-Feb-2022 | New
Urology

**OutPatient Request**

Referral Registration

**Urology | Routine | 28-Feb-2022**

<b>First Name</b> [Redacted]	<b>Last Name</b> [Redacted]	<b>Date of Birth</b> 24-Dec-1972
<b>Gender</b> <input checked="" type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Not specified	<b>Marital Status</b>	<b>Ethnicity</b>
<b>Address</b> Bronx, NY 10456	<b>Phone</b> [Redacted]	<b>Emergency Contact</b>
<b>Language</b>	<b>Interpreter Required</b> <input type="radio"/> Yes <input checked="" type="radio"/> No	<b>Patient Email</b>
<b>Referring Provider</b>	<b>Referring Provider Email</b>	<b>Referring Provider NPI</b>

**Communications**

(3)

**Equ-Physician-1** on 28 Feb 2022 11:01:46 AM  
DIAGNOSIS\_MISSING.REASON\_FOR\_REFERRAL\_MISSING, Order Type () mismatch so mapping them to General,Missing Provider details or Unable to find match,Auto process is disabled,

Type a message here...

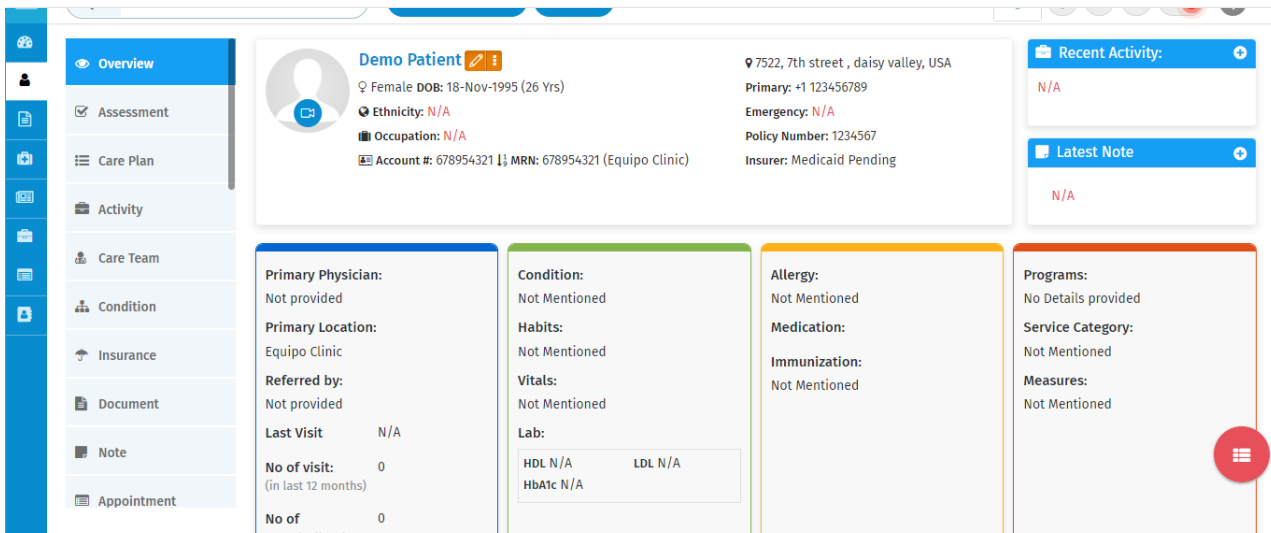


## G. Patient Chart – Order View

- i. Patient profile can be accessed from the Order Details page or can be searched from the main menu.



- ii. Patients can be searched by Name, Date of Birth, Account Number or Contact Number.
- iii. By selecting a patient, the user can navigate to the Patient's profile.



- iv. Based on the extent of EHR/EMR integration, patient information can be viewed. The 'Order' tab under Patient profile will have the details of all the Orders for the Patient.

- Allergy
- Immunization
- Message
- IVR
- Charge
- Order
- Patient Engagement
- Device
- Habit
- Notification

**Demo Patient**

♀ Female DOB: 18-Nov-1995 (26 Yrs)

🌐 Ethnicity: N/A

👤 Occupation: N/A

📄 Account #: 678954321 | 🏥 MRN: 678954321 (Equipo Clinic)

📍 7522, 7th street , daisy valley, USA

📞 Primary: +1 123456789

🚑 Emergency: N/A

📄 Policy Number: 1234567

🏠 Insurer: Medicaid Pending

Recent Activity:

N/A

Latest Note

N/A

Order

+ Clinical Order

Order Number	Type	Sender	Referred to	Referred to Facility	Referred to Provider	Category	Status	Creation Date	Action
M2204883899	Addiction Psychiatry	Equipo Health	Equipo Demo Fulfiller	-	-	Clinical	Draft	11-Apr-2022 01:00 pm	

Previous 1 ☰

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