

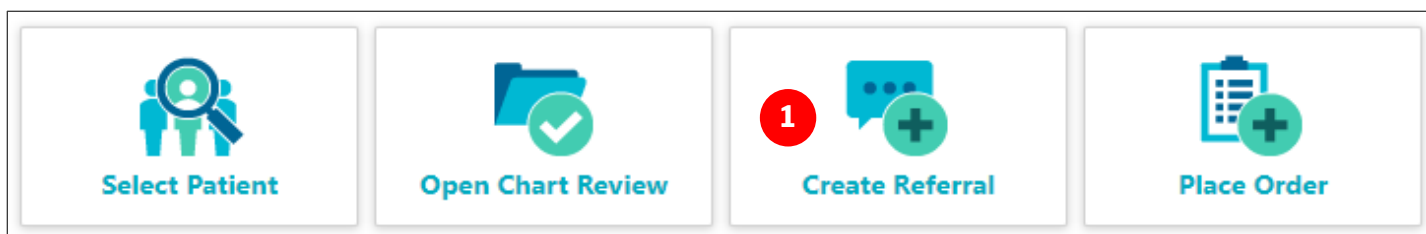
CareLink allows community users to view existing referrals and to request new referrals quickly and easily. Users in your facility who create and review referrals can monitor these in one convenient place. This tip sheet outlines how to send a referral for specialty services to a specific ECU Health clinic/department or to the Physician Referral Service when a specific clinic/department is not known. For radiology orders, refer to the [ECU Health Radiology Order Submission Tip Sheet](#).

Try It Out

Requesting a Referral

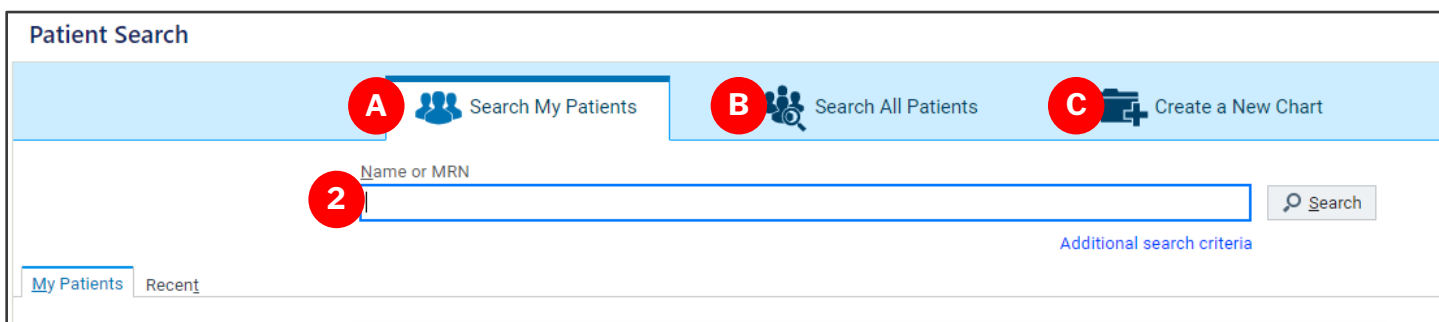
Once logged into CareLink, request a referral following the steps outlined.

1. Click the **[Create Referral]** icon.



2. Search for patients using one of the following options:

- a. Use **[Search My Patients]** if patient is linked to your practice or pulled up recently.
- b. Select **[Search All Patients]** if you do not find your patient in previous step.
- c. If unable to find patient following steps A & B, select **[Create a New Chart]**.



NOTE: If a practice has more than 2500 patients, the **Patient List** may not populate. A message will say “There are too many patients on your list to display.” The patient can still be searched under **Search My Patients**, and if it does not pull up the patient, select **Search All Patients**.

If a new chart is created, after completing all required fields, user can submit referral immediately.

CareLink

Specialty Referral Submission

3. Complete the **New Referral** fields as indicated.

a. **General Information** –

- i. **Priority** – Routine [1], STAT (within 24 hrs) [11701], or Urgent [2].
- ii. **Type** – select appropriate type from options in list – see *Referral Type & Scheduling Status* sheet for a list of types and their definitions.
- iii. **Start date** and **Expiration date** – the **Start date** should be the day referral is being placed or the date authorization starts (*if applicable*). The **Expiration date** can be left blank or match the date authorization ends (*if applicable*). If an expiration date is not entered, it will default to expire four months from the day referral was placed. The **Number of visits** should be keyed in when applicable (*i.e. Tricare Prime authorizes 6 visits*).
- iv. **Reason** – this box defaults to Carelink Referral. Please leave this field as is.
- v. **Authorization #** - must have this box filled in with the authorization number (if applicable) or type in “No Auth Req” or “NPR” which stands for *No Prior Auth Required*.

The screenshot shows the 'General Information' section of the CareLink form. It includes fields for Priority (set to Routine [1]), Class (Outgoing), Number of visits (1), Start date, Expiration date, Reason (Carelink Referral [210000201]), and Authorization #. Callouts A through V highlight specific areas: A (General Information header), B (Priority dropdown), C (Diagnoses/Services header), D (Type dropdown), E (Reason dropdown), F (Number of visits), G (Start date calendar), H (Expiration date calendar), I (Retroactive referral checkbox), and J (Authorization # field).

NOTE: If a word has a bracket with a number in it (i.e. Routine [1], you can type this number in as a shortcut.

b. **Referral By** – select provider who is requesting the referral.

The screenshot shows the 'Referral By' section of the form. It includes fields for Provider, Location/POS, and Other provider. Callout B points to the Provider dropdown menu.

c. **Referral To** – use the **CareLink Department List** (*can be located under Quick Links on the CareLink homepage*) to select location referral is being sent. It is very important to use the Department List to ensure you are selecting an active department.

CareLink

Specialty Referral Submission

- i. To send to an ECU Health facility, type in the Dept. Code or Dept. Name from the CareLink Department List in the **Department** field
- ii. To send to the Physician Referral Service to schedule for a practice outside of ECU Health, type in “PRS” in the **Department** field.
- iii. If the patient needs to see a specific provider, after Department field is keyed in, search for the provider in the **Provider** field after *department has been selected*.

Referral To C

Provider:

Location/POS: ⚠

Department: !

Provider specialty:

Department specialty:

d. Select **[Next]**.

General Information | Diagnoses/Services

General Information

Priority:

Type:

Reason:

Class: Outgoing

Number of visits: Start date: Expiration date: ⚠

Retroactive referral?

Precertification #:

Authorization #:

Referral By

Provider:

Location/POS:

Other provider:

Provider address:

Referral To

Provider:

Location/POS: ⚠

Department:

Provider specialty:

Department specialty:

D [→ Next](#)

CareLink

Specialty Referral Submission

4. Complete the **Diagnoses/Services** fields as indicated.
- Enter ICD-10 code(s) into the **Diagnoses (coded)** field. To add additional codes, select **[+ Add]**.

✓ General Information **Diagnoses/Services 4**

Diagnoses (It is required to fill in at least one item in this section)

Diagnoses (free text)

Diagnoses (coded) **A**

Multiple kidney stones [1639337]

+ Add

- Enter **AMB Referral to [specialty]** (i.e. AMB Referral to Urology) into the Procedure field under the **Services (coded)** section.

Services (It is required to fill in at least one item in this section)

Services (free text)

Services (coded) **B**

REF106 - AMB REFERRAL TO UROLOGY

Modifiers Qty Unit type

+ Add

- In the large box in the **Notes** section, indicate where records can be found.
 - When uploading notes into the referral, type **“Notes Attached.”** If notes can be found in CareEverywhere, type **“Notes in CareEverywhere DOS: xx/xx/xxxx.”**
 - Upload notes by selecting **[Add file]** – *only one document can be uploaded here, follow step 5 to add additional files into the referral.* Once done, select **[Request Referral]**.

Notes **C**

Note type

Provider Comments [6]

Note summary

Notes attached -OR- Notes in Care Everywhere DOB: 4/25/24 **i**

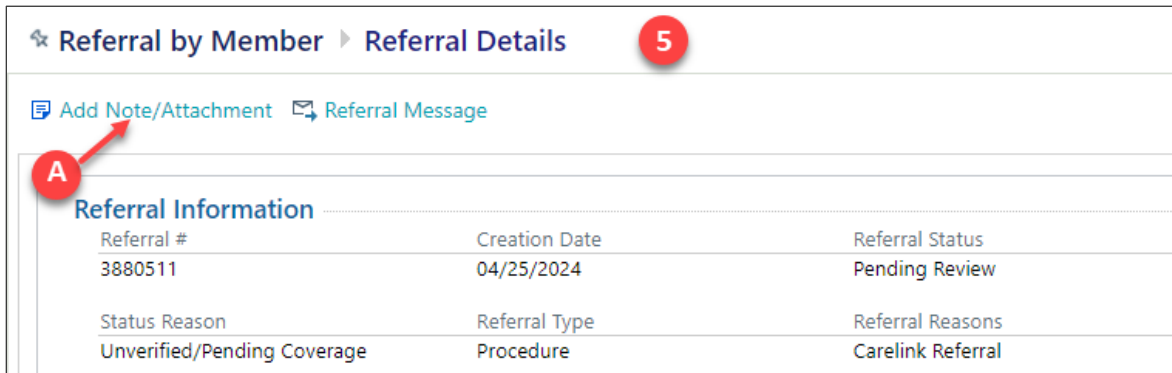
Attachment

Add file **ii**

100.0 MB Total Allowed

← Back **Request Referral** × Cancel Request

5. To add additional files into the referral, follow the steps outlined.
 - a. Select **[Add Note/Attachment]**.

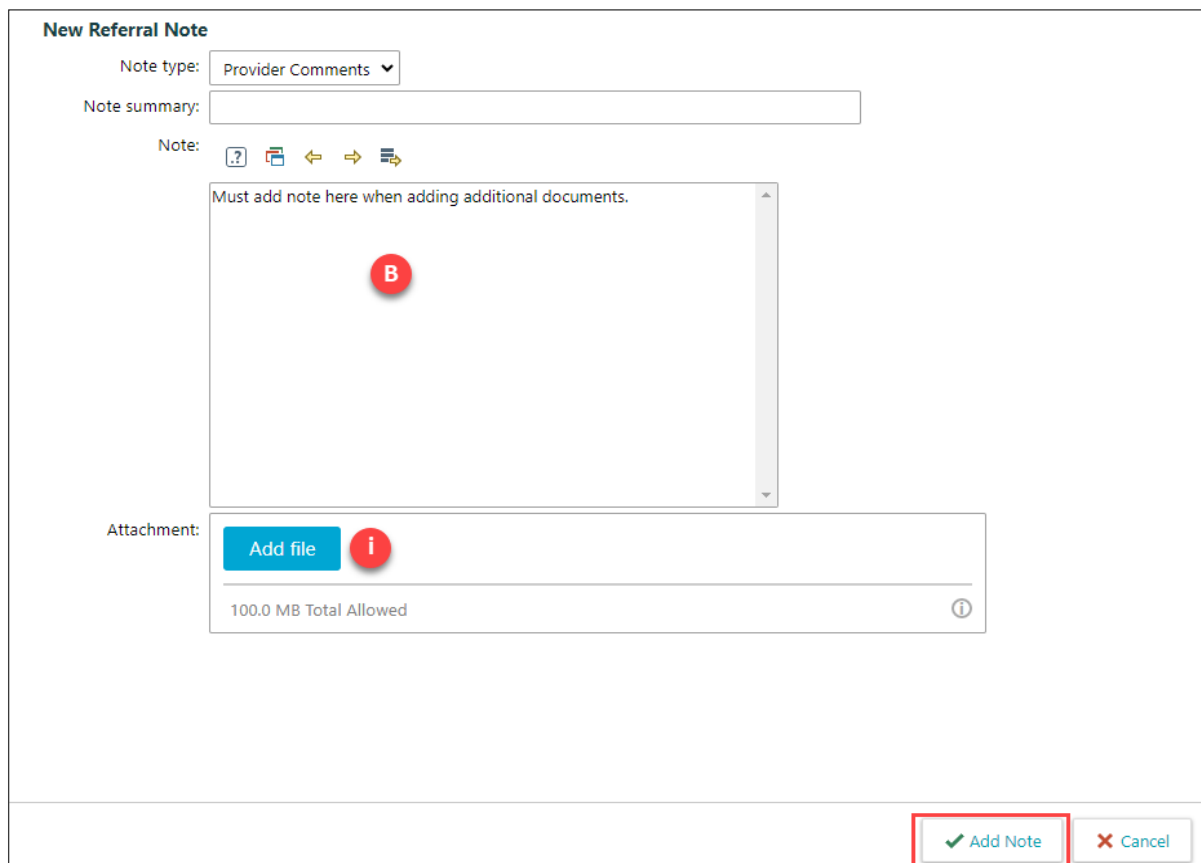


Referral by Member ▶ Referral Details **5**

A Add Note/Attachment Referral Message

Referral Information		
Referral #	Creation Date	Referral Status
3880511	04/25/2024	Pending Review
Status Reason	Referral Type	Referral Reasons
Unverified/Pending Coverage	Procedure	Carelink Referral


- b. In the **Note** section, type **Notes Attached** or label what document is (i.e. Insurance cards or PT order attached). To update demographics in patients chart, follow the steps outlined in the [Editing Demographics](#) section.
 - i. To upload, select **[Add file]** and then select **[Add Note]**.



New Referral Note


Note type: Provider Comments ▼


Note summary:

Note: 

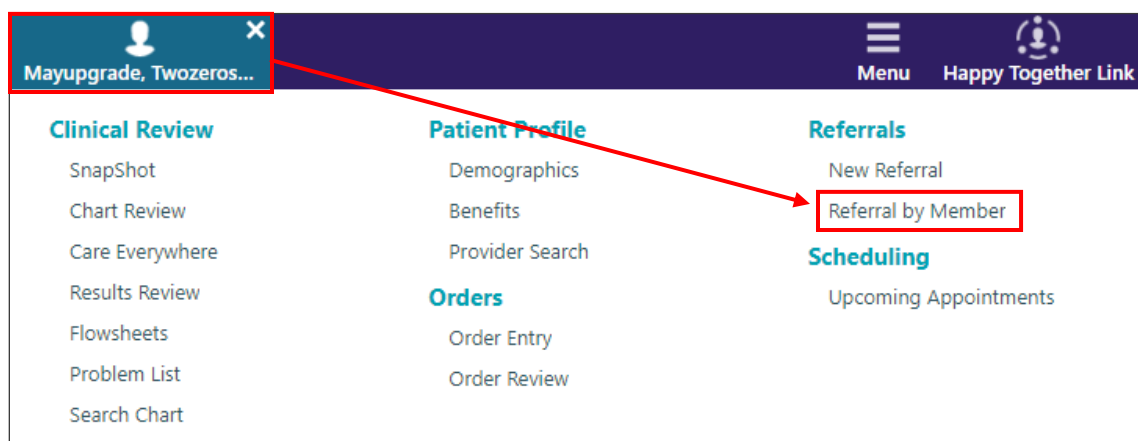
Must add note here when adding additional documents.

B

Attachment: 

100.0 MB Total Allowed 

To upload records into a referral after leaving the **Referral Details** screen, hover over the patient's name at the top of the screen and select **[Referral by Member]**. This will bring you back to the screen shown in step 5 – follow the steps to add additional notes/order into patient's referral.



NOTE: Orders for PT/OT/ST services or a Procedure (PFTs, EMGs, Sleep Studies, etc.) should be uploaded in step 4/5 – this also applies to clinics that can utilize the CareEverywhere functionality.

Helpful Tips

- If the wrong department is selected and noticed after referral has been submitted, contact the **Physician Referral Service** by sending an in-basket message to update to the correct department.
- You cannot change the *status* of a referral (i.e. from Pending Review to Authorized) and if asked, please contact the **Physician Outreach team** for guidance.
- Radiology orders must be submitted through the **Place Order** button or **Order entry** option – refer to the ECU Health Radiology Order Submission Tip Sheet.

If you have any questions or issues with accessing CareLink, please contact the **Physician Outreach Team** at PhysicianOutreach@ecuhealth.org