

## Practice Goals - Referrals Received

	Your task
	Getting started & working with referrals received
<input type="checkbox"/>	Set up your notifications
<input type="checkbox"/>	Set up your preferences
<input type="checkbox"/>	Find out if you have access to more than 1 site; if you do, select a site
<input type="checkbox"/>	Find the youngest patient in the list (sort by DOB)
<input type="checkbox"/>	Find a referral from a notification
<input type="checkbox"/>	Remove the patient name filter
<input type="checkbox"/>	Cases Sent authorized users only: Make yourself a co-owner of some cases that your CM owns
<input type="checkbox"/>	Cases Sent authorized users only: Filter by My Referrals
	Communicating
<input type="checkbox"/>	Display all referrals with unread messages, including those that are Finalized
<input type="checkbox"/>	Open referral & view Referral Summary
<input type="checkbox"/>	Set a referral status to accept pending insurance authorization
<input type="checkbox"/>	Mark the message as read
	<i>Case owner replies, updates documents</i>
<input type="checkbox"/>	Reply to a message
<input type="checkbox"/>	View new documents & attachments
<input type="checkbox"/>	Set a referral status to offered
	Documenting (all)
<input type="checkbox"/>	Add an office note that patient was with you a few months ago
<input type="checkbox"/>	Add Physician's Review and Admission Determination
<input type="checkbox"/>	Add a site attachment (any PDF file you have available)
	Documenting (home care only)
<input type="checkbox"/>	Indicate patient is on med hold, note they are pending a procedure
<input type="checkbox"/>	Remove med hold, clinically clear
<input type="checkbox"/>	Indicate orders were received
<input type="checkbox"/>	Set SOC = today on the PAA
<input type="checkbox"/>	Set SOC = tomorrow on the PAA
<input type="checkbox"/>	Display all referrals with SOC = today, including those that are Finalized
<input type="checkbox"/>	Display all referrals with SOC = tomorrow, including those that are Finalized
	Documenting (RH, LTAC, SNF only)
<input type="checkbox"/>	Indicate patient is on med hold, note they are pending a procedure
<input type="checkbox"/>	Remove med hold, clinically clear
<input type="checkbox"/>	RH only: Scan the list for Offered referrals with a PAS that was signed more than 48 hours ago, check form
<input type="checkbox"/>	RH only: Open the PAS, complete a few fields, and save
<input type="checkbox"/>	SCC only: Enter date of admission = today and confirm that the patient has been admitted
<input type="checkbox"/>	LTAC, SNF only: Open the PAS, complete a few fields, and save