Open Referrals Manual

Centricity® Business 4.3

MSU HealthTeam Training and Education (M-F 8a – 5p)

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OBJECTIVES

- Overview of Open referrals
- Open Referrals Rules
- Open Referrals Vocabulary
- Open Referrals Access Points
- Setting Up a Referral
- Restricting a Referral
- Editing a Referral
- Scheduling an Appointment and Linking to a Referral
- Linking a Referral to an Existing Appointment
- Closing a Referral
- Setting Up a Referral when the Referring Provider is not in the System
- Adding the Primary Care Provider
Open Referrals Overview

The open referrals module enables you to enter referrals, compare services with referral limits and produce reports about referral usage.

A referral is a “Purchasing Order” authorizing care not provided by the referring provider.

Referrals can be linked to charges and appointments and activity tracked.

During charge entry, the system compares charges related to the referral to procedures allowed by the referral if the referral was loaded to restrict.

When patients are referred from a provider to your organization for non-routine care, you can use the Open Referrals module to enter the referral information into the system. Later, during charge entry, the system compares charges related to the referral to procedures allowed by the referral.
Accessing Open Referrals

Accessing Advanced Web Open Referrals:

- Select Patient Services on the Vertical Tool Bar.
- Select a Patient
- Select Referral List by clicking on the link below Referrals
- The Referral List screen allows users to view existing referrals for the patient selected.
- From the Referral List screen you can select the Action Code “New/Edit Referrals” to add or edit.
**Explanation of Fields**

This section describes system screens and fields you encounter when entering internal or external referrals.

**Add/Edit Referral Screen**

<table>
<thead>
<tr>
<th>Member</th>
<th>The patient for whom the referred services is provided.</th>
</tr>
</thead>
<tbody>
<tr>
<td>FSC</td>
<td>The FSC must be loaded on the patient’s account prior to creating a referral. Select the appropriate FSC by clicking on the magnifying class or filling the field with the correct FSC for the referral. <strong>Once the referral number has been generated the FSC can not be changed.</strong></td>
</tr>
<tr>
<td>IDX Referral #:</td>
<td>The unique four-digit referral number assigned by the system. Valid entries are:</td>
</tr>
<tr>
<td>Date Ordered</td>
<td>The date the referral is issued. If generating a new referral, enter a new date. (Remember T for today’s date.)</td>
</tr>
</tbody>
</table>

![Referral Screen Diagram]

- **FSC** (Cannot be edited once the referral number has been generated)
- **IDX Referral #**: 
- **Date Ordered**

**Primary Physician:** RANDALL DO, SCOT A

**Why is Referral being closed**

- **Reason:**

  - If closing someone else’s referral, please email that clinic.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Referring Prov</td>
<td>Enter the provider referring the patient to the MSU clinic or provider. This must be a valid name from the Referring Physicians Dictionary. (Remember entering the first few letters of the provider’s last name then clicking the magnifying glass will search the dictionary for the provider)</td>
</tr>
<tr>
<td>Free Text Prov</td>
<td>Use this field if the referring provider is not in the dictionary. Up to 30 characters can be entered.</td>
</tr>
<tr>
<td>Free Text Prov</td>
<td>This can be up to 30 characters of free text to identify the referring provider. (Remember: The provider can be added to the dictionary by using the TEMP REFERAL INFO screen.)</td>
</tr>
<tr>
<td>Internal/External</td>
<td>The system will accept one of two entries: I for internal referrals from inside MSU or E for external referrals from outside MSU.</td>
</tr>
<tr>
<td>Incoming/Outgoing</td>
<td>The cursor moves to this field only for external referrals.</td>
</tr>
<tr>
<td></td>
<td>The response should be one of the following: I for incoming, i.e. a referral for a patient coming to MSU HealthTeam for care, or O for outgoing, i.e., a referral to a provider outside the MSU HealthTeam.</td>
</tr>
<tr>
<td>Description</td>
<td>This field is required. Enter a free-text description of up to 20 characters.</td>
</tr>
<tr>
<td>Health Plan Auth #</td>
<td>Free-text an external referral number of up to 20 characters.</td>
</tr>
<tr>
<td>DX</td>
<td>A diagnosis must be a valid entry from the Diagnosis IDC-9 code book. (Remember: Do not enter a diagnosis unless you are 100% sure that diagnosis is documented in the EMR and pertains to the visits attached to the referral.)</td>
</tr>
<tr>
<td>Status</td>
<td>This field is required. Enter a status by clicking on the magnifying glass and selecting from the list.</td>
</tr>
<tr>
<td>Referral Type</td>
<td>This field is required. Enter a valid referral type by clicking on the magnifying glass and selecting a referral type from the list. The system will branch to the appropriate referral type screen, which is used for entering referral target information.</td>
</tr>
</tbody>
</table>
You must enter one of the three options: Provider, Billing Area, or Division. The Referral Type screen enables you to enter the referral target and referral limits.

| MSU Provider | Enter the provider performing the referred services. It must be a valid entry from the Providers Dictionary. (Remember entering the first few letters of the provider’s last name then clicking the magnifying glass will search the dictionary for the provider) |
| Billing Area | Enter a valid Billing Area from the Billing Areas Dictionary. Click the magnifying glass for a list of valid entries. |
| Division | Enter a valid Division from the Divisions Dictionary. Click the magnifying glass for a list of valid entries. |
| Valid From Date | Enter the date on which the referral becomes valid. If a date is not entered, the system defaults in the date entered in the Date Ordered field on the main Add/Edit Referrals screen. |
| Valid Through Date | Enter the end date for services -- specified by the referring provider. |
| Max Number of Treatments | Enter the number of treatments authorized by the referral. The system decrements this field during charge entry and will display a status of visit use when attaching this referral to a patient appointment. |
Remaining Treatments: This display-only field shows the number of authorized treatments left for the referral. When charges for treatments authorized by an incoming referral are entered, the system decrements this number.

Consultation Only: Check if the Service is for Consult only

Select Procedures?: Check this box and tab to access the procedure page.

First Treatment Date: Enter the date on which treatment is scheduled, or is authorized to begin.

Click the OK Button to Return to the main Add/Edit Referrals screen: After completing the Referral Type screen, the system returns to the main Add/Edit Referral screen. Continue entering the referral data according to the following field descriptions.

Referral Type: Click magnifying glass to view valid entries. Entering referral types allows for reports to be run on the indicated categories.

Injury Dt: Enter the date the injury occurred if referral is injury related.

Injury Type: Open drop down box and select the type of injury from the list.

Comment: Free Text Field holds up to 30 characters.

Reason Referral is being closed: When closing a referral, click on the magnifying glass and select the reason from the list. (Remember if closing a referral that was generated by another department, contact the department to inform them of the reason for closing the referral.)
Entering a Referral from an External Provider

This procedure is used when a physician outside the organization refers a patient to MSU HealthTeam for care.

Before you can enter referral information and designate a payor for referred services, the following must occur:

- If a patient coming to the facility with an external incoming referral has not been registered in the system, then you must first register the patient before entering a referral.
- If you designate a patient FSC as paying for the referred services, then that FSC must be loaded into the Insurance FSC Table in order to track open referrals.

In this section you will be reviewing the procedures of three main tasks:

1. Entering referral source data
2. Entering referral target data and referral limits
3. Completing the referral

Entering Referral Source Data: The Add/Edit Referrals screen enables you to enter referral source information and other information about the referral.

Primary Physician: ZAROUKIAN MD, MICHAEL, DR

The Primary Physician field is a display only field located toward the bottom of the screen. It shows the name of the patient’s PCP only if that provider is entered in the patient’s demographic registration file.
**STEPS FOR ENTERING AN EXTERNAL REFERRAL:**

1. At the main Add/Edit Referrals screen, enter the patient’s name in the Member field. After the patient name is entered, the system will default in patient demographics.

2. Tab to the FSC field and select the appropriate FSC for this referral.  
   **NOTE:** If you want to access an existing referral, click the magnifying glass next to the IDX Referral # field to list existing referrals. The system displays all existing referrals for the patient on the Referrals Selector Screen. Click the hyper link of the Referral # to view referral or highlight the referral and click the OK button to bring the referral information to the main screen for editing or further activity.

3. To generate a new referral, Tab to the IDX Referral # field and type “G” to generate a referral number.

4. In the Date Ordered field, enter a date or enter T for today’s date.

5. In the “Referring Prov.” box, enter the last name of the referring provider. Click the magnifying glass to determine if the referring physician exists in the referring provider dictionary. Select the provider from the list.

6. If the provider does not exist in the referring provider dictionary, use the **Free Text Prov** field to record the name and then enter the name of the provider and all related information on the Temp Referral Info page.
7. If you want to record a telephone number for the referring free text provider, enter it in the Free Text Telephone number field.

   NOTE: This field is accessible only if you enter a name in the Free Text Prov field.

8. Enter E in the Internal/External field to identify the referral as external.

9. Enter I in the Incoming/Outgoing to indicate the referral as incoming.

10. Enter a brief description of the referral in the Description field. The maximum character length is 20.

11. If applicable, enter the assigned authorization number from the insurance company in the Health Plan Auth# field to identify the referral.

12. Select a valid status by clicking on the magnifying glass and choosing the appropriate option from the list.

13. Enter a valid referral type in the Referral Type field. You must use a valid entry – click on the magnifying glass next to the field to view the valid referral types.

   NOTE: Once you have filed a referral, you cannot edit the referral type. If you must edit the referral type after filing the referral, first delete it by changing its status to deleted, then re-enter the referral using the correct referral type.
Entering referral target data and referral limits:
The referral target is a provider, billing area, or division within your clinic. The system branches to the screen shown below to capture provider information.

**STEPS FOR ENTERING:**

1. Enter a provider, billing area, or division in the appropriate “Referring To” field. If the target is not a provider, then click with the mouse or use the arrow keys on your keyboard to move to the Billing Area or Division fields. The system requires an entry in one of the three Referring To fields - but only one.

2. Enter the **Valid From Date** and **Valid Through Date** as specified by the referral. The Valid From and Valid To dates are not required. You can designate a referral as valid indefinitely by leaving these fields blank.

3. Enter the **Max Number of Treatments** specified by the referral.

4. If the referring physician has scheduled a date to begin treatment, enter that date into the **First Treatment Date** field.

5. The **Remaining Treatments** field is a display-only field. It displays the number of treatments left, after charges are entered for the referred services.

6. Click OK to file the referral target information and return to the main Add/Edit Referrals screen.
Completing the referral:

1. If the diagnosis is known, enter a diagnosis in the Diagnosis field. This must be a valid entry; you may click the magnifying glass to view the valid entries.

2. If the referral is related to an injury, enter the date the injury occurred into the Injury Dt field.

3. If the referral is related to an injury, select from the Injury Type list by clicking on the drop down arrow and selecting from the list.

4. The Comment field will hold a free text comment up to 30 characters.
   
   **NOTE:** If you want to enter more referral comments, you can click the page button at the bottom of the screen, go to the comment page and enter additional information.

5. Click OK to file the referral.
Using Internal Referrals

This procedure is used to enter an internal referral. Since the referral source and the referral target are both within your organization, the system makes no distinction between incoming and outgoing.

In this section you will be reviewing the procedures of three main tasks:
1. Entering referral source data
2. Entering referral target data and referral limits
3. Completing the referral

Entering referral source data

**STEPS FOR ENTERING:**

1. At the main Add/Edit Referrals screen and enter a patient name in the Member Field. After the patient name is entered the system will default in patient demographics.

2. Enter G in the **Referral** field to generate a referral number.
   If you want to access an existing referral, click the down arrow. The system displays all existing referrals for the patient on the Referrals Selector Screen. Select a referral and choose either view referral or edit referral action code to bring the referral information to the main screen for editing or further activity.

3. In the **Date Ordered** field, enter a date or enter T for today’s date.

4. In the **Referring From** box, enter the referring provider name in **Provider field**. Click the down arrow to list valid providers from the Provider dictionary.

5. Enter External in the **External/Internal field**. This will default as internal and must be changed to external.

6. Enter a brief description of up to 20 characters in the **Description** field. 
   <This field is required.>

7. Enter the assigned Referral Type in the **Referral Type** field. <This field is required.>
Entering referral target data: In the case of an internal referral, the referral target is a provider, billing area, or division within your organization. The system branches to the screen shown below to capture referral target information.

**STEPS FOR ENTERING:**

1. Enter a provider, billing area, or division in the “Referring To” field. If the target is not a provider, use the down arrow key to move to the Billing Area or Division fields. The system requires an entry in one of the three Referring To fields - but only one.

2. Enter the Valid From and Valid Through dates specified by the referral. The Valid From and Valid To dates are not required. You can designate a referral as valid indefinitely by leaving these fields blank.

3. If the referral specifies a maximum number of treatments, enter the number in the Max Number of Treatments field.

4. Click OK to file the referral target information and return to the main Add/Edit Referrals screen. The system defaults to APPROVED in the Status field.

**Completing the referral:**

1. Enter a diagnosis in the Diagnosis field. This must be a valid entry, you may click the down arrow to view the valid entries.

2. To record a referral reason, enter it in the Referral Reason field. Click the down arrow in the field to view the valid referral reasons.

3. If you want to include a free-text referral reason of up to 60 characters, you can enter it in the Free Text Reason field.

   If you want to enter more referral comments, you can click the PAGE button at the bottom of the screen and enter up to 10 lines of free text.

4. Click OK to file the referral.
Editing a Referral

This section demonstrates how to edit a referral. After a referral has been filed, two fields are un-editable: the FSC and referral type. If you need to change one of these fields, you must start over and re-enter the referral, assigning it a different referral number.

Selecting a referral for editing: Follow these steps to select an existing referral for editing:
1. Select the patient.
2. Access the Referral List screen.
3. **DO NOT** click in the box next to the referral you wish to edit. Highlight the referral you wish to Edit.
4. Click the New/Edit Referral action code.
5. TAB twice over to the Referral number field and CLICK the down arrow to list the referrals
   - Enter the referral number, if you know it, or
   - Click the down arrow. The referrals selector screen displays any referrals for the patient, as shown below.
- From the referral list screen, select the desired referral, and choose and action code below to view or edit. The system returns to the main Add/Edit or View Referrals screen.

6. To edit move to any field, except the **Referral Type** field, to overwrite that field’s entry. If you must edit the referral type, first delete the referral by changing its status to deleted, then re-enter the referral (giving it a new referral number) with the correct referral type.

7. After you have verified the changes that you made, click OK to file the edited referral. You can verify that the change has been made by typing **R** at the **patient** field, and then selecting the referral to view.

**Editing Referrals with Attached Items:** If you want to edit a referral that has been linked to charges, a charge correction must be performed by the billing unit in Charge Entry.

**System Messages When Filing Changes:** When you make edits to a referral, the system re-adjudicates the referral against any prior changes.
Deleting a Referral

A referral is not truly deleted by the system; its status can only be changed to deleted. It remains on the system but no further actions can be performed with it. You can change its status if you need it for further referrals activities.

This section describes how to change a referral’s status to Deleted, provided the referral has no items attached to it.

1. Enter the patient name.
3. Move the cursor to the Referral field and
   - Enter the referral number, if you know it, or
   - Click the down arrow. The referrals selector screen displays any referrals for the patient.
4. Select the referral you want to delete by clicking on the referral to highlight it, and then click OK.
   - You can get summary information by viewing the referral in Expanded mode using action code E-Expand/Contract. You can get further information by pressing action code L-Linked Invoices. Click OK to return to the main Add/Edit Referrals screen. All attachments must be unlinked before you can delete the referral.
5. Move to the Status field, enter DELETED, and click OK.
6. At the system prompt Are you sure that you want to delete this referral?, click OK.
**Viewing a Referral**

**Overview:** There are two ways you can view the selector screen showing a list of the patient’s referrals:
1. from Patient Inquiry using action code R – Referrals
2. from any of several referrals screens and selecting an action code at the bottom of the screen.

**Referral Summary display screen:** You can view a patient’s referrals using the Referral Summary Display screen, and select a referral to view further details or edit the referral. Click on dropdown at any **Referral** field to view any referrals associated with a patient. The following is a sample Referral Summary display:

![Referral Summary Display](image)

From left to right, the display includes the following columns: referral number, referral target, valid from and valid to dates, number of authorized treatments, number of remaining treatments, and referral status.
**Action codes in the Referral Summary display screen:** When viewing referrals for a patient, a menu of action codes appears automatically, as shown in the previous screen. The table below briefly describes how to use referral summary screen action codes.

<table>
<thead>
<tr>
<th>Action code</th>
<th>Use this action to</th>
</tr>
</thead>
<tbody>
<tr>
<td>D - View Detail</td>
<td>Branches to the view referral detail screen, from which you can jump to other screens. Click PAGE button to view the referral target screen, then click OK to return to the selector screen</td>
</tr>
<tr>
<td>E - Expand/Contract</td>
<td>View a third and fourth line of information showing the description and referring physician</td>
</tr>
<tr>
<td>? Filter</td>
<td>Narrow the list of referrals. You can sort by most of the fields in the main referral and referral target screens.</td>
</tr>
<tr>
<td>L – Linked claims/Invoices</td>
<td>View a list of invoices attached to the referral</td>
</tr>
<tr>
<td>O – Oldest/Newest</td>
<td>Reverse the default order of newest at the top of the screen to oldest below. Press &lt;O&gt; again to restore default order</td>
</tr>
<tr>
<td>Q - ?Filter</td>
<td>Filter referrals using referral search commands with relational operators</td>
</tr>
<tr>
<td>I - Print</td>
<td>Allows you to print Referral Form Letters</td>
</tr>
<tr>
<td>T - Referral Audit History</td>
<td>Displays the audit trail for a referral</td>
</tr>
<tr>
<td>H - EDI History -</td>
<td>Displays claim history of charges tied to the referral</td>
</tr>
</tbody>
</table>
**Action Code D - View Detail:** Use this action code to view any of the component screens in the referral form, and the referral target screen. You cannot make edits or changes to a referral using this action code. Follow these steps to view details about a referral:

1. Move the selector bar to the referral you want to view by arrow up or down or click on the referral.
2. Select action code D-View Detail. The system displays the View Referrals screen, with the Jump to page prompt at the bottom.
3. Click the page button at the bottom of the screen to view additional screens/pages. You can page up or down between the referral screens by using the PAGE button.
4. Click OK to redisplay the referral target screen.
5. Click OK again to return to the referral summary selector screen.

**Action Code E - Expand/Contract:** Use this action code to change the screen to display additional information about all referrals. The Referral Selector screen is shown in expanded mode below.

The bottom line shows the entry in the Description field and the referring physician (from the Internal Prov, External Prov, or Free Text...
Viewing referrals in expanded mode does not affect the operation of any other activities.

Click on <E> to reset the summary display to two lines.

**Patient Scheduling-only information shown with Action Code E - Expand/Contract:** A third line appears if any appointments are linked to the referral. It shows total appointments scheduled, the number pending, and estimated available appointments that can be scheduled. Click on <E> to reset the summary display to two lines.

**Action Button Next to OK Button – Guided Filter:** To narrow the list of referrals, you can specify filter criteria. You can search for referrals based on the entries in one or more of virtually all fields in the main pages of the referral form.

Click on <F> to invoke action code F-Guided Filter and bring up the filter criteria form.

1. Make an entry in any of the fields in the Guided Filter box. Enter ? or F4 for a list of the dictionary entries that can be used as a filter parameter.
You can use the following relational operators in fields that contain date-related information, =, <, or >.

2. Click OK when you have entered as many parameters as you want. The system redisplay the selector screen, showing any referrals that match the parameters you entered. If no matches are found, the system returns the message No referrals passed this filter.

**Action Code L – Linked Invoices:** Follow these steps to view information about any invoices linked to a referral.

1. Select the desired referral(s).

2. Click on <L> for action code L - Linked Invoices. The system displays information about invoices linked to the referral: Invoice number, Provider, Admit/Discharge dates, charge for services, amount approved for payment, and balance.

3. Click Cancel or click OK to return to the selector screen.
# Viewing Changes to a Referral

You can view a record of changes to a referral in two ways:
1. From the referral selector screen (edit history and status history)
2. From the main Add/Edit Referrals screen (status history)

**Viewing changes from the referral selector screen:** Follow these steps to view a record of changes to a referral from the selector screen.
1. Select the referral you want to view.
2. Select action code D-View Detail. The system displays the first screen of the referral form. Click on PAGE button at the bottom to move up or down between screens.

<table>
<thead>
<tr>
<th>Referral Detail</th>
<th>OPEN HMO</th>
<th>- Audit Trail Information</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Edit History</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Entered:</td>
<td>Oper</td>
<td>Date</td>
</tr>
<tr>
<td>Edits: 1</td>
<td>MSUTRY</td>
<td>03/17/2010</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Status History</strong></th>
<th>Oper</th>
<th>Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>MSUTRY</td>
<td>03/17/2010</td>
<td>PENDING-WILL SEND</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. Select page 3-AUD. This screen displays two areas:
   - The Edit History, showing the date and the initials of the operator making the change (this just shows you that a change was made; it does not show details of the change itself.)
   - The Status History showing the date, operator’s initials, and any changes to the status of the referral
4. Once you have viewed changes you can:
   - Click Cancel to return to the selector screen, or
   - Click the Page up or down button to view a different screen.
- Click OK to jump to the Referral Type screen, then click OK again to return to the selector screen.
You can only view the pages of the referral; you cannot make any changes using action code D-View Detail.
Referral Linking

In Open Referrals you are able to create links to other applications for verification. The following are the different types of links that can occur:

- Link Charges to a Referral
- Unlink Charges from a Referral
- Link an Appointment to a Referral
- Unlink an Appointment from a Referral

If you are involved in Charge entry of Appointment Scheduling you will learn more about linking referrals from those applications.

You cannot change a referral’s status to Deleted until all linked items have been unlinked.
Unlinking and Linking an Appointment to an Existing Referral

Select the Appointment from the appointment list

Click on the Time hyperlink to access the Appointment Data Form. Enter Yes in the "Attach a Referral or Case Box" and press Tab
The Open Referral and Case Information screen will appear
Either remove the Referral Number and Click Okay to unlink a Referral
Or
Click on the Magnifying Glass to attach an authorization number to the appointment.
Other Features

- Viewing Patient Scheduling-Related Information
  - When you arrive the patient, it decrements the estimated available visits.
DELETING EXPIRED INSURANCES WITH AN OPEN REFERRAL ATTACHED IN CENTRICITY BUSINESS (Web)

1. Go into “Patient Services”
2. Bring up the patient where the insurance needs to be deleted
3. Select “appointment list”
4. Look under the “attachment” area and see where the “R” for referral is located.

Note: If the referral is attached to upcoming appointments the clinic holding the appointment needs to be alerted of the change. Look to see whom in that clinic made the appointment (highlight the appointment and right click – look under “view appt information”), then contact them to let them know that you’re going to be closing that referral for that specific pt (MRN) due to an insurance change. They will need to go back in and create an open referral with the correct insurance.

5. Click on “OK” on the Insurance list to return to the Patient Services Screen
6. Click on the “Referral List” Link.

There may be one or several referrals. The only ones you would be interested in would be the ones that are anything except closed:
- approved-auth received
- approved-no auth needed
- deleted
- pending –pre approval
- pending-retro approval
- pending-waiting for fax
- pending-will send
- rejected-duplicate referral

7. Bring up the referrals that are not closed for the insurance you need to delete one at a time and click on add/edit to go into detail. Note you will click on the box to the right of the Referral Number field to see the list of referrals.

8. If the referral you view in detail is attached to the insurance you are trying to delete, change the status to “Closed”.

9. In the “Why Referral is closing” field – select “Insurance Expired”

You should now be able to go into “Registration” for the patient and delete the applicable insurance fsc.