

PROJECT ACCESS

REFERRING CLINIC MANUAL

making health happen

PrimaryCareCoalition.org

May 2017

PROJECT ACCESS PROVIDER MANUAL

Project Access aims to provide timely, high-quality, specialty care for low-income, uninsured patients. You can help by ensuring that patients are prepared to actively engage in their specialty care, and that referrals are complete and contain all the information required for Project Access to schedule an appointment. This manual will help you and your patients through the Project Access referral process.

Project Access is a specialty care referral network administered by the Primary Care Coalition (PCC). It is composed of a dedicated group of health care specialists, local hospitals, and diagnostic facilities that participate in a coordinated effort to provide specialty care to low-income and uninsured members of our community. Project Access helps these individuals gain timely access to specialty care, potentially avoiding acute hospitalizations and expensive medical bills.

Patients referred to Project Access must be eligible for programs coordinated by the Primary Care Coalition (e.g. Montgomery Cares and Nexus Montgomery). Montgomery Cares patients are automatically eligible for specialty care through Project Access. Patients receive health care through these programs because they are uninsured and ineligible for federal safety-net programs such as Medicaid.

Clinics participating in Montgomery Cares provide primary care to these patients. Once the primary care provider (PCP) determines the patient's need for specialty care, the clinics refer the patient to Project Access, which coordinates an appointment with a specialist in our network.

Specialists who have agreed to provide services to Project Access patients are contacted by Project Access to determine availability for appointments. Project Access schedules the initial appointment when an appropriate specialist is identified.

Project Access Clinic Referral Process

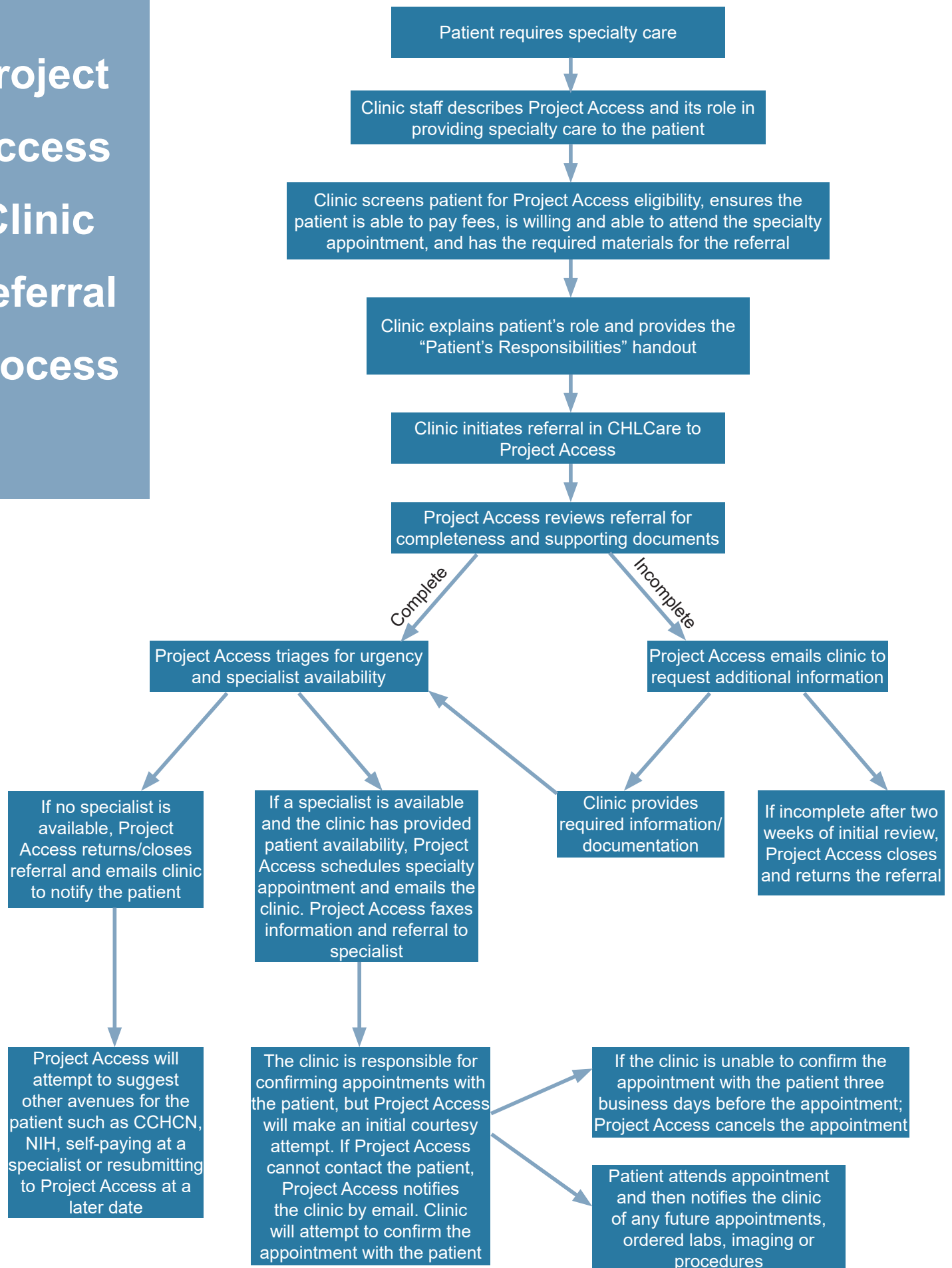


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PATIENT ELIGIBILITY CHECKLIST

Use this checklist when referring uninsured patients for specialty care through Project Access. If the information requested below is not provided, care may be delayed or the referral may be returned.

PATIENT ELIGIBILITY

To be eligible for this service the patient must:

- ☐ Be 18 years or older
- ☐ Be uninsured
(*Not enrolled in Medicare, Medicaid, or private insurance*)
- ☐ Have no plans to leave the area in the next 90 days
- ☐ Have a low household income
(*≤ 250% of the Federal Poverty Level*)
- ☐ Have current program eligibility for at least the next 90 days
(*Montgomery Cares, Nexus Montgomery*)

If the patient is eligible for Medicaid or Medicare, he/she should be encouraged to apply for coverage.

Montgomery Cares patients are automatically eligible for specialty care through Project Access. If the patient's Montgomery Cares enrollment ends within the next 90 days the clinic and patient should renew it before the referral is initiated.

PATIENT ENGAGEMENT

Before initiating the referral process, please confirm the patient:

- ☐ Understands his or her diagnosis and the need for specialty care
- ☐ Is willing to receive specialty care
- ☐ Received the "Patient's Responsibilities" handout and understands his/her responsibility in receiving specialty care
- ☐ Speaks English, or is able to arrange an adult interpreter at the appointment
- ☐ Understands that he or she will need to arrange transportation to the appointment
- ☐ Is willing and able to pay applicable co-pays

Typical office visit co-pay is \$15

Surgical co-pays vary from \$45-\$450

- ☐ Has completed all the lab work or imaging that was ordered by the primary care provider
- ☐ Has all applicable supporting documents (e.g. Photo ID, MRI/CT discs, X-ray)

CHECKLIST

If the patient meets the eligibility requirements, please obtain the information below and ensure it is entered and accurate in CHLCare. **If the information is not provided, care may be delayed or Project Access may return the referral.**

- ☐ Name
- ☐ Gender
- ☐ Date of birth
- ☐ Address

If address is unavailable is the patient homeless?

- ☐ Household Income
- ☐ Household Size
- ☐ Federal Poverty Level
- ☐ Preferred Language
- ☐ Enter clinic encounter information and PCP information (see page 6, Step 1)
- ☐ Specialty Needed
- ☐ Diagnosis
- ☐ Briefly describe the current medical issue and purpose of the referral
- ☐ What days of the week and time of day is the patient available?

Availability should be typed into the Notes/Comments section of the referral in CHLCare. If the patient's availability is limited, this may delay care.

- ☐ Upload all relevant labs, imaging, and hospital consults to the patient's referral

Please provide the patient with the **"Patient's Responsibilities"** handout so the patient knows what is expected of him or her.

 primary care coalition PROJECT ACCESS Patient's Responsibilities	 primary care coalition PROJECT ACCESS Responsabilidades del paciente
<p>To participate in Project Access and receive specialty care, you agree to:</p> <ul style="list-style-type: none"> Accept and return calls to schedule appointments. Arrange your own transportation to appointments. Bring an adult interpreter to appointments, if you do not speak English. Arrive 15-30 minutes before the scheduled appointment time. Notify Project Access if labs, radiology imaging, or other tests are ordered by your specialist. Notify Project Access if you schedule a follow-up appointment with your specialist. Apply for Medicaid or Medicare, if you are eligible. Notify Project Access if you get health insurance. <p>If you cannot be contacted or if you do not return phone calls, your appointment will be cancelled.</p> <p>Patients who miss scheduled appointments will no longer be eligible for Project Access.</p>	<p>Para participar en <i>Project Access</i> y recibir atención especializada, usted consiente a:</p> <ul style="list-style-type: none"> Aceptar y devolver llamadas para programar las citas. Coordinar su propio medio de transporte para acudir a las citas. Llevar a un intérprete adulto consigo a las citas, en caso de que no hable inglés. Llegar entre 15 y 30 minutos antes de la hora programada para la cita. Notificar a <i>Project Access</i> si su especialista le ordenó exámenes de laboratorio, imagenología radiológica u otro tipo de pruebas. Notificar a <i>Project Access</i> cuando programe una cita de seguimiento con su especialista. Solicitar Medicaid o Medicare, si califica. Notificar a <i>Project Access</i> si tiene seguro médico. <p>Si no se le puede contactar o si no devuelve las llamadas telefónicas, se cancelará su cita.</p> <p>Los pacientes que pierdan las citas programadas, dejarán de calificar para <i>Project Access</i>.</p>
Project Access 301.628.3430	Project Access 301.628.3430

If the primary care provider ordered labs or imaging these should be completed and uploaded into CHLCare prior to submitting the referral. The referral should **NOT** be submitted until all tests are completed and results are uploaded into CHLCare.

ELIGIBLE PRINCE GEORGE'S COUNTY ZIP CODES IN NEXUS MONTGOMERY

Project Access: Specialty Care for the Uninsured

Nexus Montgomery provides access to specialty care through Project Access. In addition to serving Montgomery County patients, Project Access can now also serve Prince George's County residents in selected zip codes.

Use this reference guide to determine whether or not a Prince George's County patient is eligible for access to specialty care through Nexus Montgomery.

To be eligible for specialty care the patient must:

- ☐ Be 18 years or older
- ☐ Be uninsured (*Not enrolled in Medicare, Medicaid, or private insurance*)
- ☐ Have no plans to leave the area in the next 90 days
- ☐ Have a low household income ($\leq 250\%$ of the *Federal Poverty Level*)
- ☐ Live in an eligible Prince George's County zip code (*see below*)

ELIGIBLE PRINCE GEORGE'S COUNTY ZIP CODES

Zip Codes	Towns
20705	Beltsville
20706	Lanham
20707	Laurel
20708	
20737	Riverdale
20740	College Park
20770	Greenbelt
20774	Upper Marlboro
20782	Hyattsville
20783	
20784	
20785	

If the patient needs an **urgent** referral please contact:

Project Access

Phone: 301-628-3426

Fax: 301-608-9047

SpecialtyNurse@primarycarecoalition.org

Project Access is administered by the Primary Care Coalition and funded by the Montgomery County Department of Health and Human Services and Nexus Montgomery. Nexus Montgomery is a collaborative effort among the six hospitals operating in Montgomery County and a variety of community-based organizations including the PCC and Project Access.

TIPS FOR MAKING A REFERRAL

COMMUNICATING WITH PROJECT ACCESS

Enter **non-urgent** referrals completely into CHLCare. No email or phone call to Project Access is necessary. If a case needs to be discussed with Project Access prior to entering the referral in CHLCare, please email Project Access with questions or concerns.

Please enter **urgent** referrals into CHLCare and then send an email notifying Project Access of the entry.

Email: SpecialtyNurse@primarycarecoalition.org

SPECIALTY CARE

Clinics may not directly refer to or authorize services on behalf of Project Access. Project Access will not cover the cost of any services not initiated/authorized by Project Access staff. The patient will be responsible for all costs of care initiated by the clinic outside the Project Access referral process.

Specialty care services are provided pro bono or at discounted rates. In exchange, Project Access needs to provide all the appropriate information to support specialty care. Please upload appropriate and current supporting documentation into CHLCare (recent labs, diagnostics, primary care provider notes and recent hospital notes, etc.) or the referral will be returned and the patient's care will be delayed.

There are three general options for specialty services. Please refer to only one of these for a particular episode of care (Project Access; Catholic Charities Health Care Network (CCHCN); privately arranged through clinic). Referring to multiple networks creates re-work and confusion for all parties.

PATIENT OUT-OF-POCKET EXPENSES

Most specialists accept a sliding scale based on the Federal Poverty Level (typically \$15 per visit and \$15 per procedure). These co-pays are printed on the referral form provided to the patient. Some specialists charge additional fees for visits and procedures. Project Access handwrites the "special fees" on the referral form that is mailed to the patient. Contact Project Access for any questions about patient financial responsibilities.

Please note, Project Access does not schedule or fund primary care provider ordered imaging. CCHCN may provide this service, but Project Access does not.

CHLCare AND eCW

Please be aware that patient demographic information entered into the PCC instance of eCW is "pushed" into CHLCare each night to avoid needing to enter that information for an established patient. But information entered into CHLCare does NOT get pushed to eCW. **To make updates on patient demographics, always make them in eCW, not in CHLCare**, or the changes will not convey to the eCW medical record. Non-eCW clinics should update all demographic and eligibility information in CHL Care.

SCHEDULE AN APPOINTMENT

Project Access will schedule the specialty appointments and provide the clinic with logistical information (date/time/location/prep). The clinic is responsible for confirming the appointment with the patient. Project Access will make an initial courtesy attempt. If Project Access cannot contact the patient, Project Access will notify the clinic by email or phone.

When the clinic confirms an appointment with the patient, the clinic indicates in CHLCare that the appointment was confirmed. **If the clinic is unable to confirm and document the confirmation in CHLCare three business days before the appointment, it will be canceled.**

When confirming appointments, please consult the checklist (page 2) to ensure the patient's information is up to date and accurate. If the information is inaccurate, care will be delayed. Please provide the patient with the Patient's Responsibilities handout (page 2) so the patient knows what is expected of them.

FOLLOW-UP

The specialist will send consult notes and any future orders to Project Access with a copy to the referring provider. If the clinic receives lab or imaging orders, email or phone Project Access and upload the documents to CHLCare. If there is a specialty follow up appointment, the clinic should enter a referral in CHLCare.

- For non-surgical follow-up, Project Access will coordinate and schedule the specialist's requested diagnostics.
- For planned surgery, the patient will bring the pre-operative (pre-op) documents to the clinic or Project Access will upload pre-op documents to CHLCare and notify the clinic they are there. The clinic will arrange and schedule all pre-op services. **Project Access does not schedule or fund pre-op testing or clearances.** Please contact Project Access with any questions or concerns.

After scheduling pre-op appointments, the clinic should upload into CHLCare all pre-op documentation, including pre-op orders and results, once they are available. Notify Project Access by email when all documentation is uploaded. Project Access will then send all pre-ops to the operating room, specialist, hospital finance department, and anesthesia.

It is essential the patient knows the importance of getting pre-ops done in a timely manner. If patients do not complete pre-ops or complete them at the last minute, their surgery may be cancelled. This delays the patient's surgery and affects the relationship among Project Access, the hospitals and the specialists. Please ensure patients know their role if they are scheduled for any surgery or procedure.

When you schedule patients for surgery in CHLCare choose the specialty **"Hospitalization."** Only Project Access should select **"Appointment Confirmed."** This allows Project Access to track when documentation/pre-ops are in the right place and helps prevent surgery cancellations.

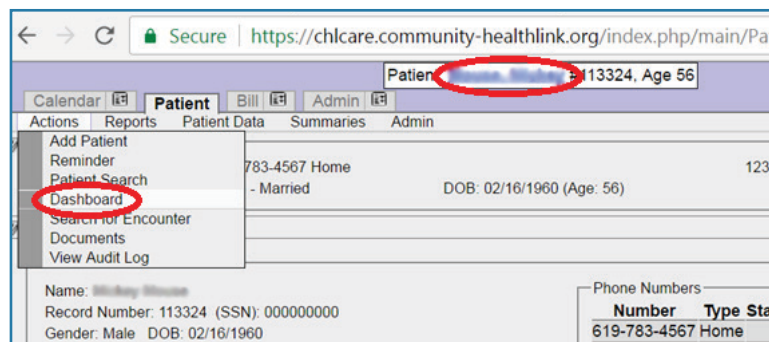
CHLCare PROCEDURE

ENTER A SPECIALTY CARE REFERRAL REQUEST

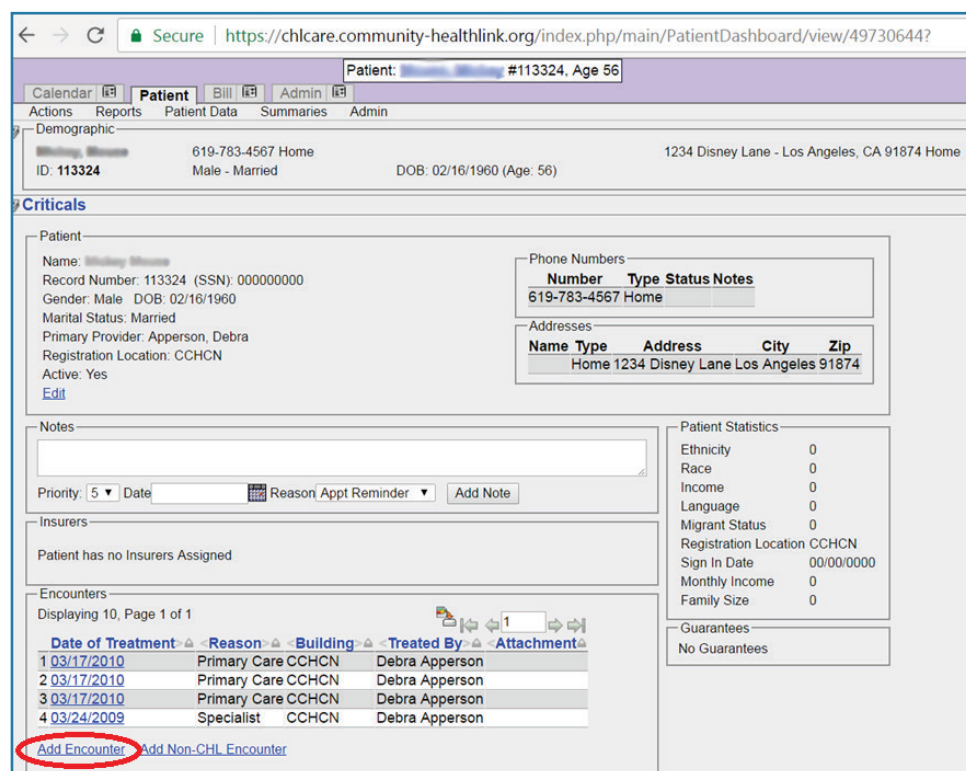
The patient's primary care encounter information is linked to the referral sent to the specialist. The referral will have the patient's PCP information so the specialist can fax their notes or contact the PCP to discuss the case.

This step only needs to be performed when adding a patient for the first time in CHLCare, or if a patient changed clinics since his or her last referral.

STEP 1: To add an encounter, go to the patient's dashboard. This can be done by selecting the patient's name in blue at the top of the screen or by going to the **"Actions"** menu and selecting **"Dashboard."**



Scroll down to the **"Encounters"** section and select **"Add Encounter"** at the bottom of the screen.



Fill in the clinic encounter information using the drop down menus: Facility, Treating Provider, Date of Treatment, Encounter Reason, and Appointment. Select “**Update Encounter.**”

The screenshot shows the CHLcare system interface for editing an encounter. The patient information at the top is Mickey Wilson, #113324, Age 56. The 'Encounter' tab is selected, and the 'Details' sub-tab is active. The form contains the following fields:

- Facility: PCC Special Programs (dropdown)
- Treating Provider: No Provider (dropdown)
- Date of Treatment: 01/26/2017 (calendar icon)
- Encounter Reason: (dropdown)
- App. Title: (dropdown)
- Appointment: (dropdown)

Buttons for 'Update Encounter', 'Close ->', and 'Delete Encounter' are at the bottom of the form. A red circle highlights the entire encounter details section.

STEP 2: To enter a Project Access specialty care referral request, begin by selecting the “**Patient Data**” menu and then “**Referrals**” from the menu options. This will take you to the Referral Request screen.

The screenshot shows the CHLcare system interface with the 'Patient Data' menu open. The patient information at the top is Mickey Wilson, #113324, Age 56. The 'Patient Data' menu is expanded, showing the following options:

- Clinical Summary
- Appointments
- Encounters
- Financials
- Lab/Test Order
- Lab/Test Result Mgt
- Medications
- Referrals** (highlighted with a red circle)
- Notes
- Demographics
- Medical History
- Documents

STEP 3: On the Referral Request screen, select “**Project Access**” or “**CCHCN**” from the programs listed. Use the drop-down menu to select the encounter date when the referral request was made (if nothing appears, please refer to Step 1). Then select “**Add Referral Request.**”

https://chicare.community-healthlink.org/index.php/main/Referral/add

Patient: [redacted] #154536, Age 50

Calendar Patient Bill Admin

Actions Reports Patient Data Summaries Admin Case Management

Demographics

Criticals

Referral Requests Summary

Add a New Referral Request for this Patient

Program Select Clinic Visit (if appropriate)

Project Access

Other Referrals (Ad Hoc)

AHCN Referrals

Wednesday, 04/18/2012 at PCC Special Programs

Monday, 12/12/2011 at PCC Special Programs

Tuesday, 05/17/2011 at PCC Test Location

Add Referral Request

Referral Request History

Select Referral Request date to access Previous Referral Requests for this Patient

Referral Request Program Status Reason Specialty Serv

October 15, 2012 Project Access Requested Positive fecal occult x 3; family hx of colon cancer. Gastroenterology Other

When referring Prince George’s County patients for specialty care through Nexus Montgomery the coverage information will need to be added.

Select “**Patient Data**”→“**Demographics**”→“**Insurance**”→“**Program/Participation.**”

Please fill in all the requested information. The beginning date of coverage should be the date of referral. The end date of coverage should be 365 days post date of referral. For example, April 25, 2017 - April 24, 2018.

STEP 4: The next screen allows you to enter more detailed information about the referral you are requesting.

- Use the drop-down list to select the specialty you are requesting from the list of available choices.
- Translation and transportation services are not provided by Project Access or CCHCN. The default selection is “No,” **please do not change this.**
- Enter the patient’s preferred time slot in the drop down menu and all other available times in the Notes/Comments section on the right-hand side of the screen.
- Further down on the screen is a text field where you must enter the reason for the referral. This should be a brief summary taken directly from the primary care provider’s note explaining why a specialty care consult is needed.
- Provide a clinical summary and the purpose of the referral request (patient history, diagnoses, test results, consultations, evaluations, treatments, etc.). Again, this should be a brief summary based on the primary care provider’s progress note. After you finish entering this information, select “**Save and Send to Program Manager for Appointment.**”

Demographics

Criticals

Referral Request: Project Access

Request Date: November 23, 2012

Eligibility Expires: Y

Eligible Thru: 07/23/2013

Federal Poverty Level: 138% VF 20.00 / PF 35.00

[Program Options](#)

Specialty Needed: **General Surgery**

Translator Needed: **N**

Referral Service: **(blank)**

Transportation Needed: **N**

Requested Slot: **Monday** **8:00 AM - Noon**

Referral Assessment/Reason: **RUQ pain and abdominal US showing gallstones.**

Brief History with Diagnosis and Results: **Recurring RUQ abdominal pain for 2 mos. now. Abd US done in 09/12 shows multiple <1cm stones in the gallbladder.**

Save & Send to Program Manager for Appointment

Encounter Info

Date of Encounter: 04/18/2012

Encounter Location: PCC Special Program

Reason: Primary Care

Notes/Comments

If the clinic performs any action regarding the referral, such as uploading documents or contacting the patient, or if there is any update regarding the referral, the clinic should enter a note in the Notes/Comments section.

STEP 5: You should now see a pop-up screen giving you the option to:

- Continue with the referral request
- Cancel the referral request
- Go back to the previous screen if you are unsure that the referral information you entered is complete and accurate

When the information is complete select “**Continue with this Referral Request.**” The request will now be saved to the system for further review by Project Access staff.

Calendar Patient Bill Admin

Actions Reports Patient Data Summaries Admin Case Management

Demographics

Criticals

Referral Request: Project Access

Request Date: November 23, 2012

Eligibility Expires: Y

Eligible Thru: 07/23/2013

Federal Poverty Level: 138% VF 20.00 / PF 35.00

Specialty Needed: General Surgery

Translator Needed: N

Referral Service: (blank)

Transportation Needed: N

Requested Slot: Monday

Referral Assessment/Reason: RUQ pain and abdominal US showi

Encounter Info

Date of Encounter: 04/18/2012

Encounter Location: PCC Special Programs

Treating Provider: Dorazio, Charity

Procedures: 99202

Reason: Primary Care

Diagnoses: 250.405, 1,272.4

Notes/Comments

To prevent unnecessary delays in obtaining an appointment, please be sure that:

- LABS and X-RAYs have been done, if needed, and results are available
- You have adequately filled in the physicians Referral Reason and Brief History or Visit data

I have what is needed
Continue with this Referral Request

I first need to set up a Lab or XRay
Cancel this Request

I need to add more info now
Take me back a screen

Brief History with Diagnosis and Results

Recurring RUQ abdominal pain for 2 mos. now. Abd US done in 09/12 shows multiple <1cm stones in the gallbladder.

Save & Send to Program Manager for Appointment

STEP 6: Project Access uses CHLCare to update the status of a request as it goes through the scheduling process. When a referral is entered into CHLCare, the status is shown as “**Requested.**”

Project Access will review the referrals for completeness. Items reviewed include:

- Program Eligibility (e.g. Montgomery Cares, Nexus Montgomery)
- Documents needed to process the referral

The screenshot displays the CHLCare interface with two main sections: 'Referral Status' and 'Appointment Details'.

Referral Status: A list of status options is shown, with 'Requested' highlighted by a red circle. The other options are 'Requested - Eligibility Pending', 'Appointment Pending', 'Appointment Confirmed', 'Appointment Kept', 'Appointment No-Show', and 'Returned'.

Appointment Details: This section contains several fields and buttons:

- Appointment Details:** A button labeled 'Set up an Appointment for this Request' is visible.
- Encounter Info:** Fields include 'Date of Encounter: 04/18/2012', 'Treating Provider: Dorazio, Charity', 'Encounter Location: PCC Special Programs', 'Procedures: 99202', 'Reason: Primary Care', and 'Diagnoses: 250.405 1,272.4,278'.
- Requestor:** The name 'Amit Rahman' is listed.
- Notes/Comments:** A section for notes with a 'Call Made?' checkbox (Yes/No) and an 'Update' button.
- Consult Reports:** A link to 'Attach Consult Reports'.
- Referral Documents:** A link to 'Attach Referral Documents'.

Project Access cannot schedule specialty care appointments for patients with missing and/or expired eligibility. Before entering a referral request, please make sure the patient's eligibility status is up to date. If the patient's Montgomery Cares eligibility expires within 90 days the patient will need to renew it prior to initiating the referral.

SUBMIT SUPPORTING CLINICAL DOCUMENTATION

Project Access requires appropriate supporting documents prior to processing specialty referrals. Examples of supporting documents include:

- The progress note written by the primary care provider requesting the referral
- Lab reports supporting the referral request
- Imaging reports (X-ray, CT, MRI results) supporting the referral request
- **Any hospital notes if the patient was hospitalized during the past year for the current medical issue (please indicate in the Notes/Comment sections which hospital the patient visited and the date of discharge)**
- Prescription for physical therapy or other procedure

Depending on the patient's condition and the specialty being requested, the type of supporting documents needed varies. For example, an orthopedic surgery referral request for knee pain will require an imaging study of the affected joint. A general surgery referral request for right upper quadrant abdominal pain concerning gallstones will usually require basic lab work and an abdominal ultrasound. If you are unsure about what supporting documents to submit with a referral request, ask the referring provider or another clinical provider at your clinic.

Supporting documents should be uploaded directly into CHLCare. After a referral request has been submitted, Project Access staff may require additional documentation. Project Access will enter a note in the Notes/Comments section of the referral screen and will email you with the requested information.

The screenshot displays the CHLCare interface for managing a referral. It is divided into several sections:

- Referral Status:** A list of status options including "Requested / Eligibility Pending", "Requested", "Appointment Pending", "Appointment Confirmed", "Appointment Kept", "Appointment No-Show", and "Returned".
- Appointment Details:** Contains encounter information such as "Date of Encounter: 04/18/2012", "Treating Provider: Dorazio, Charity", "Encounter Location: PCC Special Programs Procedures: 99202", and "Reason: Primary Care". It also lists "Diagnoses: 250.405.1, 272.4, 278".
- Notes/Comments:** This section is highlighted with a red arrow. It contains a text area with the following content: "Call Made? ☐ Yes ☒ No. Click on the X below to ~~crossout~~ a recent note, then select 'Update'. X 11/20/2012 Progress note, lab report and US abdomen received. KF. X 11/21/2012 Progress note and lab report >6 mos. old. Requesting more recent progress note and labwork. IG". Below the text area is an "Update" button.
- Consult Reports:** Includes a link to "Attach Consult Reports".
- Referral Documents:** Includes a link to "Attach Referral Documents".

Project Access will not schedule appointments for referral requests submitted without appropriate supporting documents. The referral initiator is responsible for responding to requests for supporting documents in a timely manner. Failure to provide required documentation will delay scheduling, and may cause the referral request to be returned.

SUPPORTING DOCUMENTATION

To best serve referred patients, our specialists need the appropriate supporting documents, labs or imaging. All Project Access referral requests must be submitted with a recent progress note documenting a history of present illnesses, current medications, medication allergies, a focused physical exam and a reason for the referral. The table below lists the supporting tests typically required for common referral requests.

Specialty Requested ✓		Issue Area	Recommended Tests	Documents Received
	Cardiology		CMP, CBC, PT, PTT, Lipid Profile	
			EKG	
			Cardiac Imaging Reports, if available (e.g. ECHO, MRI, nuclear study)	
			Stress Test Report, if available	
			Hospital Discharge Summary, if available	
	Endocrinology	Thyroid	CMP, CBC, TSH, free T4, total T3	
			Thyroid Imaging, if available (e.g. ultrasound, nuclear study)	
	Gastroenterology	Anemia/ positive hemocult	CMP, CBC	
			At least 2/3 positive stool guaiacs, or positive fecal immunochemical test (FIT)	
		Hepatitis	CMP, CBC	
			HB S Ag, HB S Ab, Hepatitis C Ab	
	General Surgery	Gallbladder	CMP, CBC	
			Abdominal US or HIDA scans	
		Thyroid Nodules	CMC, CBC, PT, PTT	
			TSH, free T4, total T3	
			Thyroid imaging report (e.g. ultrasound, nuclear study)	
	Hematology/ Oncology	Anemia	Repeat CBCs with diff	
			Serum iron, ferritin, TIBC	
		Low Platelets	Repeat CBCs with diff	
			Cancer	Pathology Report
		Imaging Reports (CT or MRI)		
	Nephrology	Diabetic Nephrology	CMP, HgA1C, UA with microscopic analysis	
	Orthopedic Surgery	Knee Injury	MRI Report	
		Degenerative Knee/ Hip Disease	X-ray or CT report	
		Bone Fracture	X-ray or CT report	
		Physical Therapy		PT order signed by provider
Radiology	Radiology order signed by provider			
	Urology	Kidney Stones	UA with microscopic analysis	
			Renal protocol CT, renal US or cystourethrogram	
		Prostate Cancer	UA with microscopic analysis	
			Repeat PSAs	
		Testicular Masses	Testicular US	

AVAILABLE SPECIALTIES

Some specialties experience fluctuations in supply and demand. Please contact the nurse at Project Access with any questions regarding specialty availability at 301-628-3426 or SpecialtyNurse@primarycarecoalition.org.

As of April 2017, the following specialties are regularly available through Project Access:

- ◆ Allergy
- ◆ Audiology/Otolaryngology
- ◆ Cardiology
- ◆ Dermatology
- ◆ Endocrinology
- ◆ Gastroenterology
- ◆ General Surgery
- ◆ Hematology/Oncology (limited)
- ◆ Nephrology
- ◆ Neurology
- ◆ Ophthalmology
- ◆ Orthopedic Surgery
- ◆ Physical Therapy
- ◆ Podiatry
- ◆ Pulmonology
- ◆ Rheumatology
- ◆ Speech Therapy
- ◆ Thoracic Surgery
- ◆ Urology
- ◆ Vascular Surgery
- ◆ Wound Care

CONFIRM APPOINTMENT INFORMATION

STEP 1: When an appointment has been scheduled, the status of a referral request changes to **"Appointment Pending."** The date, time and location of the specialty care appointment appears on the top right of the referral screen. Project Access staff will notify you by email or phone that an appointment has been scheduled.

The screenshot displays the Project Access referral system interface. On the left, there is a sidebar with a list of status options: [Requested / Eligibility Pending](#), [Requested](#), [Appointment Pending](#), [Appointment Confirmed](#), [Appointment Kept](#), [Appointment No-Show](#), and [Returned](#). A red arrow points from the 'Appointment Pending' status to the main content area. The main content area is divided into two sections. The top section, titled 'Specialist: Dr. Michael Zenilman', shows the appointment details: 'Edit Time: 11:00 AM - December - 5 - 2012' with a 'Save' button, and the location: '6420 Rockledge Dr Suite 220, Bethesda, MD 20817, Phone: (301) 896-6880'. A 'Cancel this Appointment' button is also present. The bottom section, titled 'Encounter Info', displays a table of encounter details:

Date of Encounter:	Treating Provider:
04/18/2012	Dorazio, Charity
Encounter Location:	Procedures:
PCC Special Programs	99202
Reason: Primary Care	Diagnoses: 250.405.1, 272.4, 278

Below the encounter info, the 'Requestor: Amit Rahman' section shows a list of notes/comments. A red arrow points from the 'Appointment Pending' status to the first note. The notes include:

- Call Made? ☐ Yes ☒ No
- Click on the X below to ~~crossout~~ a recent note, then select "Update".
- X 11/20/2012 Progress note, lab report and US abdomen received. KF
- X 11/21/2012 Progress note and lab report >6 mos. old. Requesting more recent progress note and labwork. IG
- X 11/21/2012 Requested supporting docs faxed. AR
- X 11/23/2012 New progress note and labwork received. KF
- X 11/26/2012 Appointment with Dr. Zenilman scheduled for Wed. Dec 5th @ 11AM. Please confirm with patient. Email to requestor sent. IG

Project Access works with a limited number of specialists, most of whom volunteer their time to see low-income, uninsured patients. As a result, Project Access cannot always guarantee that a referral request will be scheduled. When capacity is limited in a particular specialty area, Project Access nurses triage pending referral requests according to clinical priority. If an appointment cannot be scheduled, Project Access nurses will return the referral request and contact you by email to discuss next steps.

STEP 2: The referring clinic is ultimately responsible for contacting the patient to confirm the appointment. As a courtesy to the clinic, Project Access will make an initial attempt to contact the patient. If unsuccessful, the clinic must contact the patient and confirm that he or she will be able to make the appointment. Once the appointment is confirmed change the referral status to **"Appointment Confirmed"** to indicate that the patient has been contacted.

For surgeries/hospitalizations, only Project Access staff should select **"Appointment Confirmed"** in CHLCare.

The screenshot displays the CHLCare system interface for updating an appointment. On the left, a list of appointment statuses is shown: Requested / Eligibility Pending, Requested, Appointment Pending, Appointment Confirmed, Appointment Kept, Appointment No-Show, and Returned. A red arrow points to 'Appointment Confirmed'. The main area shows appointment details for Specialist Dr. Michael Zenilman, including the date and time (11:00 AM, December 5, 2012) and a 'Save' button. Below this is the 'Encounter Info' section with fields for Date of Encounter, Treating Provider, Encounter Location, and Reason. The 'Requestor: Amit Rahman' section contains a 'Notes/Comments' list. A red arrow points to the 'X' icon next to the most recent note: '11/27/2012 Patient contacted and appointment confirmed. AR'.

It is absolutely critical for you to contact the patient in a timely manner and confirm whether he/she will be able to make it to the scheduled appointment. If the patient is unable to keep the scheduled appointment, it is equally important to inform Project Access staff in a timely manner so that the specialty care provider can be informed.

VIEW CONSULT REPORTS

After the specialist has seen the patient, Project Access changes the referral to “**Appointment Kept**” and uploads the consult report from the specialist into CHLCare. Consult reports can be viewed on CHLCare by clicking on the filename listed in the “**Consult Reports**” area in the bottom section of the referral screen.

The screenshot shows a web interface for managing referrals. At the top, there is a search bar. Below it, there are buttons for 'Add CPT', 'Add Diagnosis', and 'Add Claim Line'. The 'Consult Reports' section is highlighted with a red arrow pointing to the filename '1 154536 Consult_report_12_05_12.pdf' in the table. Below this, there is a 'Referral Documents' section with a button 'Attach Referral Documents' and a link to '154536 ProgressNote Labs 11_21_12.pdf'.

Name	Review	Reviewer	Review Date
1 154536 Consult_report_12_05_12.pdf	<input type="checkbox"/>		

If you are looking for a consult report, please check CHLCare prior to contacting the specialist's office or Project Access

RETURNED REFERRAL REQUESTS

Project Access may return a referral request when:

- Project Access is unable to secure an appointment within a reasonable amount of time due to lack of availability
- The appointment is not confirmed with the patient

Whenever Project Access returns a referral, staff will notify you by email or phone, and will change the status of the referral to **“Returned.”**

The screenshot displays a web-based interface for managing referral requests. On the left, a sidebar contains a 'Referral Status' dropdown menu with a red arrow pointing to the 'Returned' option. The main content area is divided into two columns. The left column shows appointment details for a patient named Amit Rahman, including the date of encounter (04/18/2012), treating provider (Dorazio, Charity), and location (PCC Special Programs). The right column shows the 'Notes/Comments' section, which includes a red arrow pointing to a note dated 11/21/2012 stating: 'Reviewed documents. Unable to schedule appt. at this time. Scheduling high-priority requests only. Returning referral request. Email sent to clinic. IG'.

Referral Status

- [Requested / Eligibility Pending](#)
- [Requested](#)
- [Appointment Pending](#)
- [Appointment Confirmed](#)
- [Appointment Kept](#)
- [Appointment No-Show](#)
- **Returned**

Appointment Details

N/A

[Set up an Appointment for this Request](#)

Encounter Info

Date of Encounter:	04/18/2012	Treating Provider:	Dorazio, Charity
Encounter Location:	PCC Special Programs	Procedures:	99202
Reason:	Primary Care	Diagnoses:	250,405.1,272.4,278

Requestor: Amit Rahman

Notes/Comments

Call Made? ☐ Yes ☒ No

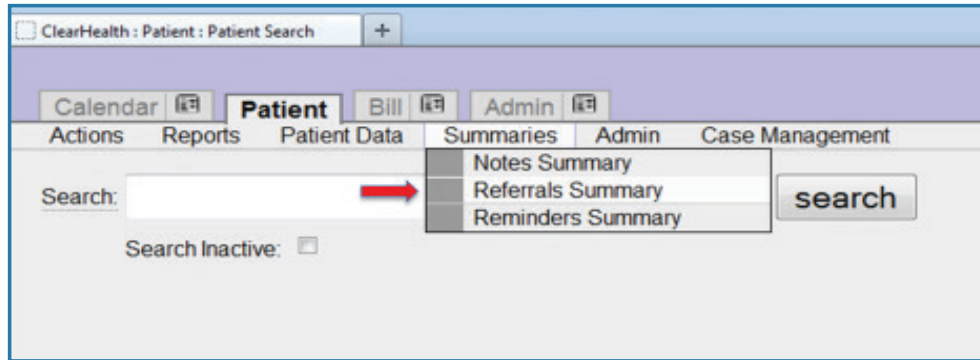
Click on the X below to ~~crossout~~ a recent note, then select "Update".

X 11/21/2012 Progress note and lab report received. KF

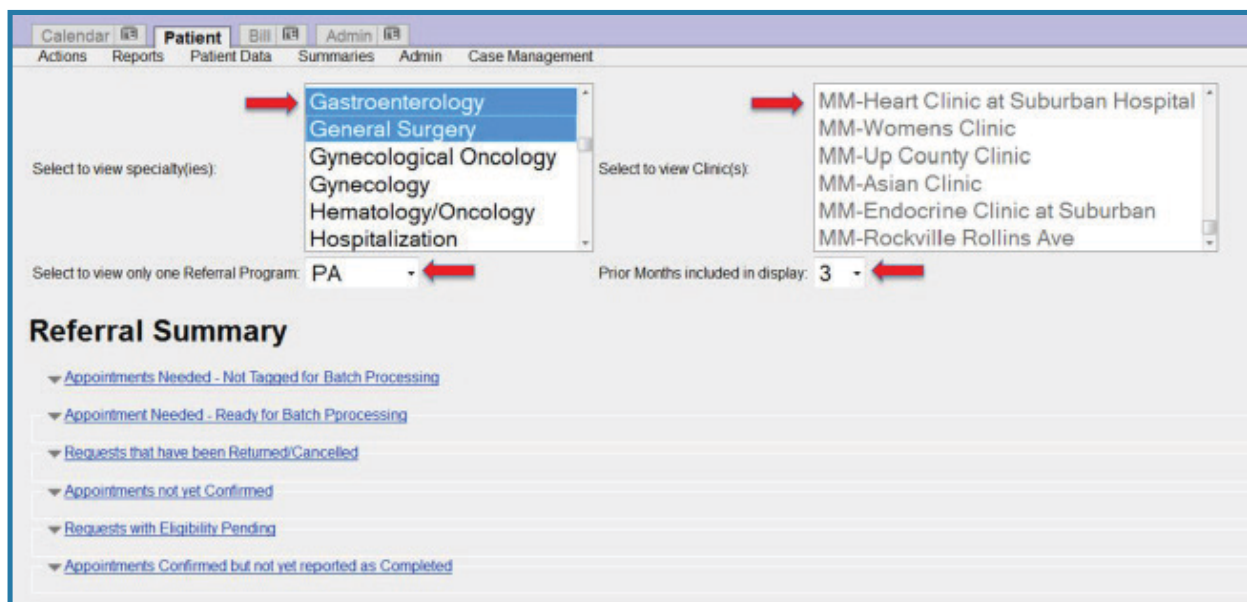
X 11/21/2012 Reviewed documents. Unable to schedule appt. at this time. Scheduling high-priority requests only. Returning referral request. Email sent to clinic. IG

TRACK MULTIPLE REFERRAL REQUESTS FOR A SINGLE PATIENT

STEP 1: CHLCare has a Referral Summary screen that summarizes your referral requests by status. To access the screen, select the “**Summaries**” menu and then “**Referrals Summary**.”



STEP 2: The filters on the Referral Summary screen allow you to customize the reports you generate. You can view the status of referrals for a specific specialty or multiple specialties by selecting them from the list in the upper left corner of the screen. To select multiple specialties, hold down the “**CTRL**” key while clicking on your selections. Using the list on the upper right corner of the screen, you can track referral requests from one or more clinic locations. The Referral Program menu allows you to view referral requests made to a specific program, such as Project Access or CCHCN. Lastly, the menu in the middle of the screen allows you to select how many months back you want the reports to span.



STEP 3: After you have set the filters according to your preferences, you can view summary lists of referrals by status. Selecting **“Appointments Needed – Not Tagged for Batch Processing”** will generate a list of all referral requests that have yet to be scheduled for an appointment. Returned referrals will not be on this list.

Select to view specialty(ies): **General Surgery**
 Gynecological Oncology
 Gynecology
 Hematology/Oncology

Select to view Clinic(s): **PCC Special Programs**
 PCC Test Location

Select to view only one Referral Program: **PA** Prior Months included in display: **3**

Referral Summary

▼ **Appointments Needed - Not Tagged for Batch Processing**

	Last Name	First Name	MRN	Referral Request	Reason	Program Name
1	Booth	Mark	10007	November 21, 2012	Multiple gallstones f/u	Project Access
2	Booth	Andrew	10748	November 20, 2012	35 y/o female patient presents with history of pain and swelling of the Lt groin for the past 4 months.	Project Access
3	Booth	Andrew	10748	November 20, 2012	35 y/o female patient presents with history of pain and swelling of the Lt groin for the past 4 months.	Project Access
4	Booth	Paul	10000	November 16, 2012	Removing of a Nevus on Scalp.	Project Access
5	Booth	Mark	10748	November 15, 2012	62 y/o female needs to have Laparoscopic cholecystectomy. patient was in the ER for pain and N/V. radiology report showed gallstones with biliary colic.	Project Access
6	Booth	Mark D.	10000	November 13, 2012	60 y/o female needs to have an evaluation for a non movable mass on the Right supraclavilar area. Mass measures 1.5x1 inches.	Project Access
7	Hong	Yan Boon	10007	November 09, 2012	Baker's cyst x 2 months	Project Access
8	Booth	Paul	10748	November 08, 2012	Hx of gallstones on and off. Colic since June 2012.	Project Access
9	Booth	Mark D.	10000	November 08, 2012	Hernia R inguinal pain x 4 months; gradually getting worse.	Project Access

STEP 4: Select **“Requests that have been Returned/Cancelled”** to generate a list of referral requests that are returned and no longer being considered for appointments. The reason a referral was returned will be listed in the Notes/Comments section of each individual returned referral.

Select to view only one Referral Program: **PA** Prior Months included in display: **3**

Referral Summary

▼ **Appointments Needed - Not Tagged for Batch Processing**

▼ **Appointment Needed - Ready for Batch Processing**

▼ **Requests that have been Returned/Cancelled**

	Last Name	First Name	MRN	Referral Request	Reason	Program Name	Location
1	Booth	Mark	10007	November 06, 2012	Surgery scheduled by Dr. Ansari for Friday November 9 per patient's son.	Project Access	MM-East Mont Svc Ctr
2	Booth	Paul	10748	November 06, 2012	Right lower quadrant abdominal pain. Worse with standing, running, and bending. Slight palpable separation of muscle.	Project Access	MM-Gburg Ascen Mob
3	Booth	Mark	10000	November 05, 2012	55 y/o female needs to have an evaluation for removal of .5 cm soft mass on the lower lip.	Project Access	Mercy Health Clinic
4	Booth	Paul	10748	November 01, 2012	Thyroid Nodule on R lobe mildly enlarged.	Project Access	Projecto Salud-Wheaton
5	Booth	Mark	10000	October 31, 2012	L thigh Lipoma	Project Access	Projecto Salud-Wheaton
6	Booth	Mark	10000	October 31, 2012	36yF presents for concern regarding a birthmark on her upper thigh that is now irritating her. Pain is only when her underwear or her pants rub against it, sometimes causing a open wound that doesn't bleed and resolves on its own after wearing looser-fit	Project Access	MM-Up County Clinic
					36yF presents for concern regarding a birthmark on her upper thigh that is now irritating her. Pain is only		

STEP 5: Select “**Appointments Not Yet Confirmed**” to generate a list of referral requests that have been scheduled, but need to be confirmed with the patient. This summary is especially important for you because you are responsible for contacting the patient to confirm the appointment. It is also very important that you update the referral status to “**Appointment Confirmed**” after confirming with the patient.

Select to view only one Referral Program: **PA** Prior Months included in display: **3**

Referral Summary

- Appointments Needed - Not Tagged for Batch Processing
- Appointment Needed - Ready for Batch Processing
- Requests that have been Returned/Cancelled
- Appointments not yet Confirmed**

Last Name	First Name	MRN	Referral Request	Reason	Program Name	Location
1	Hughes	11111	November 15, 2012	BIRADS 4- SUSPICIOUS. NEEDS BX/ SURG CONSULT	Project Access	MM-Up County Clinic
2	Johnson	11112	October 01, 2012	gall stones	Project Access	MM-IBNS at IEC
3	Smith	11113	September 18, 2012	Painful sebaceous cyst on upper back.	Project Access	Proyecto Salud-Wheaton
4	Roberts	11114	September 12, 2012	57 yo cau male with bilateral inguinal hernia. Refer to general surgery for correction.	Project Access	MM-Gburg Ascen Moby
5	Miller	11115	September 06, 2012	f/u requested by Dr. Marter	Project Access	MM-East Mont Svc Ctr
6	King	11116	August 24, 2012	abscess on L neck	Project Access	CCACC PAV/HC-Med Clinic

STEP 6: Montgomery Cares patients must have current eligibility. Select “**Requests with Eligibility Pending**” to generate a list of referral requests for which the patient’s Montgomery Cares eligibility is either expired or undocumented. **This summary is especially important, because no further action can be taken until you update the patient’s eligibility.**

Referral Summary

- Appointments Needed - Not Tagged for Batch Processing
- Appointment Needed - Ready for Batch Processing
- Requests that have been Returned/Cancelled
- Appointments not yet Confirmed
- Requests with Eligibility Pending**

Last Name	First Name	MRN	Referral Request	Reason	Program Name	Location
1	Smith	73055	November 16, 2012	Foot/nail care Lymphadenopathy, DM?	Project Access	MM-East Mont Svc Ctr
2	Patricia Gomez	147436	November 08, 2012	Colonoscopy scheduled for 11/19/12 at 2:00pm w/Dr. Weinstein @ 5550 Friendship Blvd, Suite T90, Chevy Chase, MD 20815; Phone: 301-654-252.	Project Access	Marys Center Flower Ave
3	Roberts	92078	October 25, 2012	Sleep Study per Dr Kim	Project Access	PCC Special Programs
4	Roberts	92078	October 15, 2012	elevated hemoglobin and hematocrit	Project Access	PCC Special Programs
5	Roberts	23602	October 15, 2012	Blurred vision. In need of Cataract surgery.	Project Access	Proyecto Salud-Wheaton
6	Patricia	145885	October 03, 2012	54 YO female with persistent swelling on right posterior neck. Had seen an ENT who ordered a CT; CT was negative. Pt was supposed to F/U with ENT but Dr. Bond is no longer in practice. Please evaluate for possible biopsy.	Project Access	HC - Gaithersburg MC
7	Montgomery	122518	October 01, 2012	Hyperthyroidism, Goiter.	Project Access	Proyecto Salud-Wheaton

STEP 7: Select “**Appointments Confirmed but not yet Reported as Completed**” to generate a list of referrals that were scheduled but for which consult reports are still pending. Project Access staff will always change the status of a referral to “**Appointment Kept**” when uploading the consult report into CHLCare.

Referral Summary							
▼ Appointments Needed - Not Tagged for Batch Processing							
▼ Appointment Needed - Ready for Batch Processing							
▼ Requests that have been Returned/Cancelled							
▼ Appointments not yet Confirmed							
▼ Requests with Eligibility Pending							
▼ Appointments Confirmed but not yet reported as Completed							
Last Name	First Name	MRN	Referral Request	Reason	Program Name	Location	Specialty
1	Shah	11000	November 20, 2012	Follow Up/ Dr. Kashif Firozvi on Sunday 12/09/2012 at 10:00am	Project Access	CCI-Gaithersburg Hematology/Oncology	
2	Shah	11000	November 19, 2012	Surgery scheduled for 12.20.12	Project Access	PCC Special Programs	General Surgery
3	Shah	11000	November 15, 2012	Please evaluate URGENTLY for cholecystectomy. 35 yo male who has had consistent RUQ pain since September. Found to have gallstones and has had multiple subsequent emergency room visits. has continued nausea, pain and anorexia.	Project Access	CCI-Takoma Park	General Surgery
4	Shah	11000	November 15, 2012	PT per Dr Knolmeyers orders	Project Access	PCC Special Programs	Physical Therapy

PROJECT ACCESS CONTACT INFORMATION

If you have any questions regarding the specialty care referral process please contact Project Access:

Main Phone: 301-628-3430

Fax: 301-608-9047

Client Services Specialist: 301-628-3444

Client Services Specialist: 301-628-3421

Nurse: 301-628-3426

Billing: 301-628-3413

Main Email: SpecialtyCare@primarycarecoalition.org

Urgent Referrals: SpecialtyNurse@primarycarecoalition.org

Address: 8757 Georgia Ave. 10th floor

Silver Spring, MD 20910

PrimaryCareCoalition.org



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