



OCCRN Program Description

Powered by AXEIUM, the Orange County Community Referral Network is a web-centric, electronic referral system that is the result of a collaborative program to leverage information technology to formalize and facilitate referral relationships by and between community health centers, private practitioners, hospitals and nonprofit Community Benefit Organizations that serve the Southern California safety net population.

Grant Funding

Development of OCCRN was funded by contributions from United Healthcare, Kaiser Permanente, St Joseph Health System, Lestonnac Free Clinic, and Brilogy Corporation.

Program Sponsor

At the spearhead of this referral system initiative is Ed Gerber, Executive Director of the Lestonnac Free Clinics that provide the lion's share of specialty care to the Orange County, California safety net population.

Program Components

- **eReferral:** Access to specialty care. Clinics that provide primary care can refer patients to clinics and/or providers that provide specialty care. Each specialty has a list of required items provided as guidance to help ensure that the referral is complete. Referring providers, can upload attachments, and can track the progress of the patient through the workflow. On completion of the exam, the rendering provider can upload the progress note, for return to the referring provider.
- **eConsult:** For some services, a provider-to-provider consult may be sufficient. This feature allows providers to create an electronic consult.
- **Surgery Wait List:** Clinics can put patients that need surgery on a county-wide wait list. Care coordinators at facilities that offer surgery days can view the wait list and accept patients based on provider availability. Care coordinators can then manage their workflow to track candidates through the process to determine if they are eligible to receive the surgery.
- **Hospital Referrals:** Patients that have been treated in the ED can be referred to a community clinic for their follow up visit. The ED case manager presents the patient with brochure explaining where to go for their follow up appointment. Patients that present to the ED with non-emergent conditions can be diverted/referred to a local clinic in an effort to establish that clinic as a primary care home.

Technology

The clinic referral network is a distributed Microsoft Windows based, client-server architecture. Each facility user downloads the app to their desktop, and authenticates to the IBM cloud-hosted server using encrypted passwords transmitted over SSL. This leading edge technology is built on a robust framework that delivers an exceptional user experience.

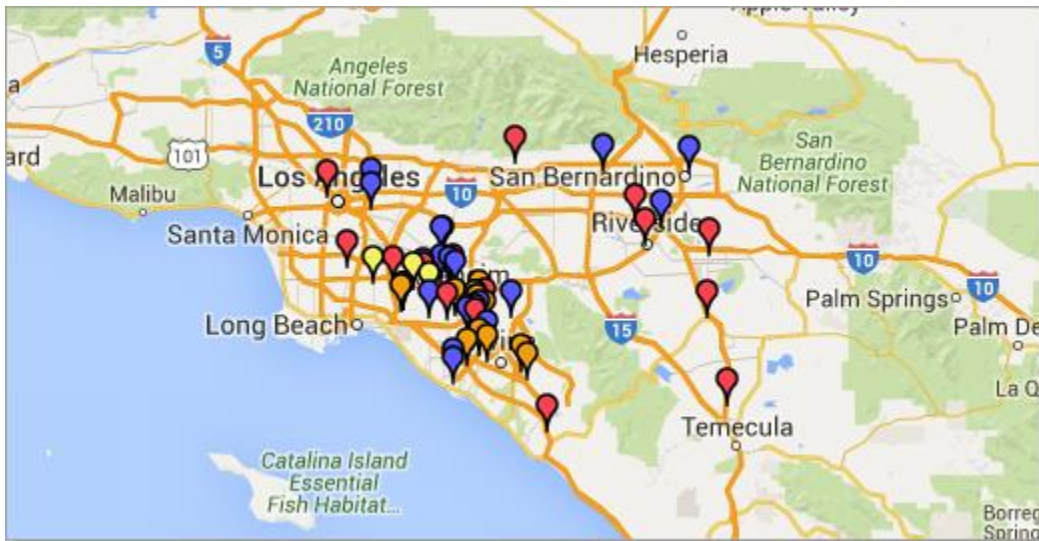
Key Features

- Simple, clean and easy user interface, requires minimal training
- Two step referral creation process, recognizes the need for MA's to enter a referral in pending status while case managers collect and upload patient documentation
- Fully integrated workflow provides visibility into activities worked and real-time status of each referral
- User-configurable, opt-in email notification will advise you when a new activity has been logged for one of your referrals
- Receiving facilities can post documents and guidance for review by referrers, e.g., consent forms or evaluation criteria
- Built-in guidance for each specialty helps to ensure that receiving providers have everything they need to complete the referral
- Application automatically checks for updates each time it is loaded
- No limit on number of users, and local admin has ability to set up additional users
- Grid layout and screen size preferences saved for each user; all data grids have built-in filter bar and export to Excel option
- Built-in document viewers means you can review attachments quickly without having to open each one, one-by-one
- Simple one-click configuration to set payers and specialties accepted by your facility
- Fully integrated, enterprise-quality report writer
- Extensible framework can be integrated into Clinic's/Hospital's EHR via web services to facilitate automatic document transfer and notification

Community Development

Developed with the full involvement of clinical management, providers, and clinicians, every aspect of the software application has been vetted and field tested to minimize the time and effort required to process and manage referrals, and to maximize the reporting capabilities.

Initial response from the community has been overwhelmingly positive, and while originally funded to improve the Orange County referral process, the system has already expanded into Riverside, San Bernardino and Los Angeles counties.



Screen Prints



Create Referral

Example of screen help - Create Referral

Inbound/Outbound Referrals, default presentation sorts pending 🟡 referrals to the top

AXEUM Referral System - Build 1.0.5134.16626 User - ADMIN - Remote ARS
1/22/2014 Screen Number PM38 CC02

Referrals

Outbound Referrals

| Status | Referral Type | Patient+DOB | Specialty | Docs | Rank | Days Old | Referred To Clinic |
|--------|--------------------|--------------------------------------|----------------------------|------|------|----------|-----------------------------|
| 🟡 | Hospital Follow... | Patient, Test (01/10/1990) | Emergency Dept Follow-Up | 0 | | 9 | Lestonnac - Los Alami... 01 |
| 🟡 | Referral | Duranles, Maria (06/15/1962) | Echocardiogram, Non Stress | 0 | | 19 | Lestonnac - Orange 01 |
| 🟡 | Referral | Tomas, Maria (06/26/1957) | Urology | 0 | | 13 | Lestonnac - Orange 01, |
| 🟢 | Referral | Zapata, Amalia (07/17/1952) | Acupuncture | 1 | 1 | 5 | Lestonnac - Orange 01, |
| 🟢 | Referral | OCAMPO, VIRGILIO (09/26/1961) | Acupuncture | 1 | 1 | 1 | Lestonnac - Orange 01 |
| 🟢 | Referral | Bundy, Roger C (05/29/1950) | Acupuncture | 1 | 2 | 47 | Lestonnac - Orange 12, |
| 🟢 | Referral | Test, Test (01/10/1990) | Acupuncture | 1 | 2 | 8 | Lestonnac - Orange 01 |
| 🟢 | Referral | Trejo, Domico (10/09/1940) | Acupuncture | 0 | 3 | 33 | Lestonnac - Orange 12 |
| 🟢 | Referral | Mercado, Maria (11/06/1952) | Acupuncture | 0 | 4 | 36 | Lestonnac - Orange 12 |
| 🟢 | Referral | Herrera, Urbana (05/25/1953) | Acupuncture | 0 | 5 | 14 | Lestonnac - Orange 01 |
| 🟢 | Referral | Martinez Rio, Claudia veronica (0... | Acupuncture | 0 | 6 | 8 | Lestonnac - Orange 01 |
| 🟢 | Referral | Bundy, Roger C (05/29/1950) | Acupuncture | 0 | 7 | 7 | Lestonnac - Orange 01 |
| 🟢 | Referral | PALACIOS, CHRISTIAN (04/19/1979... | Acupuncture | 0 | 8 | 2 | Lestonnac - Orange 01, |
| 🟢 | Referral | ROSAS, CLARA (06/11/1971) | Acupuncture | 0 | 9 | 2 | Lestonnac - Orange 01, |
| 🟢 | Referral | Hendao, Flor (11/22/1962) | Acupuncture | 0 | 10 | 2 | Lestonnac - Orange 01 |
| 🟢 | Referral | Hernandez, Nely (08/25/1959) | Audiologist | 0 | 1 | 39 | Lestonnac - Orange 12 |
| 🟢 | Referral | Puffo, Tito (01/06/1954) | Cardiology | 0 | 1 | 8 | Lestonnac - Orange 01 |
| 🟢 | Referral | Palacio, Romeo (11/11/1950) | Cardiology | 2 | 1 | 2 | Lestonnac - Orange 01 |
| 🟢 | Referral | OCAMPO, VIRGILIO (09/26/1961) | Cardiology | 0 | 2 | 40 | Lestonnac - Orange 12 |
| 🟢 | Referral | Test, Test (01/10/1990) | Cardiology | 1 | 2 | 5 | Lestonnac - Orange 01 |

Example of built in grid filtering, with unique occurrence auto filter

| Patient+DOB | Specialty | Docs | Rank | Days Old | Re |
|---|---------------|------|------|----------|-----|
| OCAMPO, VIRGILIO (09/26/1961) | (Custom) | 1 | 1 | 1 | Les |
| Bundy, Roger C (05/29/1950) | (Blanks) | 1 | 2 | 47 | Les |
| Trejo, Domico (10/09/1940) | (NonBlanks) | 0 | 3 | 33 | Les |
| Mercado, Maria (11/06/1952) | Colonoscopies | 0 | 4 | 36 | Les |
| Herrera, Urbana (05/25/1953) | Acupuncture | 0 | 5 | 14 | Les |
| Martinez Rio, Claudia veronica (01/10/1990) | Audiologist | 0 | 6 | 8 | Les |
| Bundy, Roger C (05/29/1950) | Cardiology | 0 | 7 | 7 | Les |
| OCAMPO, VIRGILIO (09/26/1961) | Dermatology | 0 | 8 | 2 | Les |
| Test, Test (01/10/1990) | Acupuncture | 0 | 9 | 2 | Les |

Example of workflow activity log

Referral Information 1/22/2014 Screen Number PM55b PM38 PM1

New Cancel Referral Delete Activity Reopen Referral

👤 Sergio Martinez 09/08/1964 Age: 49, Referral for ENT Otolaryngology, from: Lestonnac Free Clinic to: Lestonnac - Orange

| Patient Information | Attachments (0) | Review and Submit | Messages | Workflow |
|---------------------|-----------------|-------------------------|---|------------------------------|
| ActivityDisplayDate | Activity Date | Referral Step | Comment | Create User Create |
| 12/14/2013 12:51 PM | 12/14/2013 | Created | Created on: 12/14/2013 12:51, UserName: edow, UserID: 229. | Emily Dow Lestonnac F |
| 12/14/2013 12:51 PM | 12/14/2013 | Referral was Submitted | Referral was submitted by Axeium on: 12/14/2013 12:51, Use... | Emily Dow Lestonnac F |
| 12/14/2013 12:51 PM | 12/14/2013 | Patient was Setup | Axeium Patient assigned is 45440 | Emily Dow Lestonnac F |
| 12/20/2013 4:35 PM | 12/20/2013 | Appointment Set | Axeium Patient appointment is 1/21/2014 9:20:00 AM | Bryan Melgar Lestonnac - |
| 01/21/2014 4:30 PM | 01/21/2014 | Referral was Complet... | Completed 45440 | Maggie Plancarte Lestonnac - |

Imbedded file viewer can read most common document and image types

Referral Information 1/22/2014 Screen Number

PM55b PM41 PM38

● **Maria Torres** 03/24/1972 Age: 41, **Referral for Dermatology**, from: **North OC Regional Health Foundation** to: **Lestonnac - Orange**

Guidance: 11.15.2013 Please stand by... The Coalition is working on guidance for each referral specialty. In the interim, please think to attach everything necessary for the specialist to complete the referral, which in general, should always include labs, meds, and the last progress note.

| Required Items | Documents Attached | |
|-----------------|----------------------|--|
| Attachment Type | Attachment Type | Attachment File Name |
| Labs | Progress Note | C:\Documents and Settings\yazminestrada\Desktop\Ana\Lestonnac Attachments\Torres, Maria 03.24.1972.htm |
| Medication List | Progress Note | |
| Progress Note | | |

File Viewer

File Name: Attachment_38_Torres, Maria 03.24.72.htm

North Orange County Regional Health Foundation
901 W. Orangethorpe Ave
Fullerton, CA 92832
Phone (714) 441-0411 Fax (714) 441-1824

TORRES, MARIA (DOB: 3/24/1972 ID: 7331)

Oct 25, 2013 Fri 11:26 AM

CC c/o itchy-rash all over her body x 7 days.

HPI LMP: 10/10/13

Internal messaging capability

Outbound Priority

Inbound Referrals

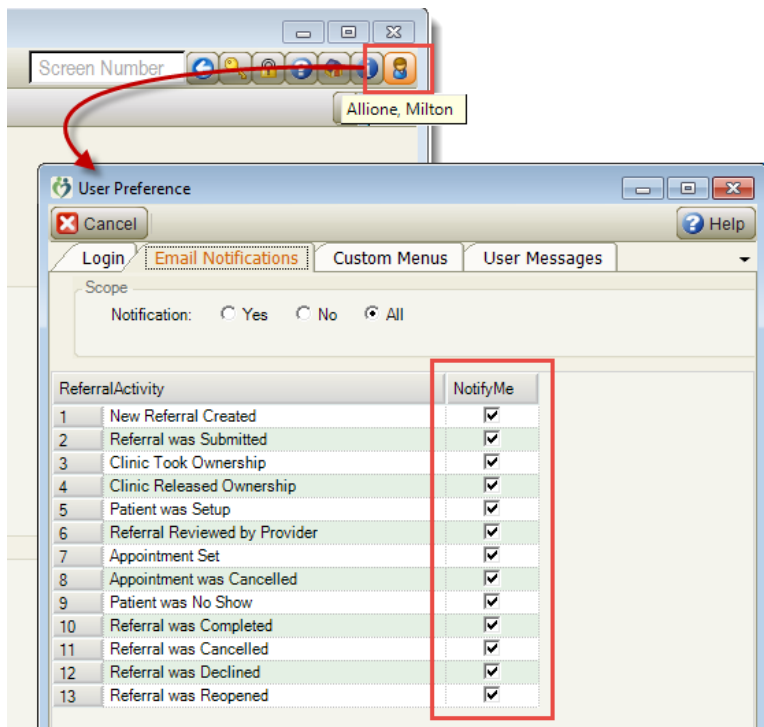
1/3 **Surgery Waitlist**

Hospital Follow-Up

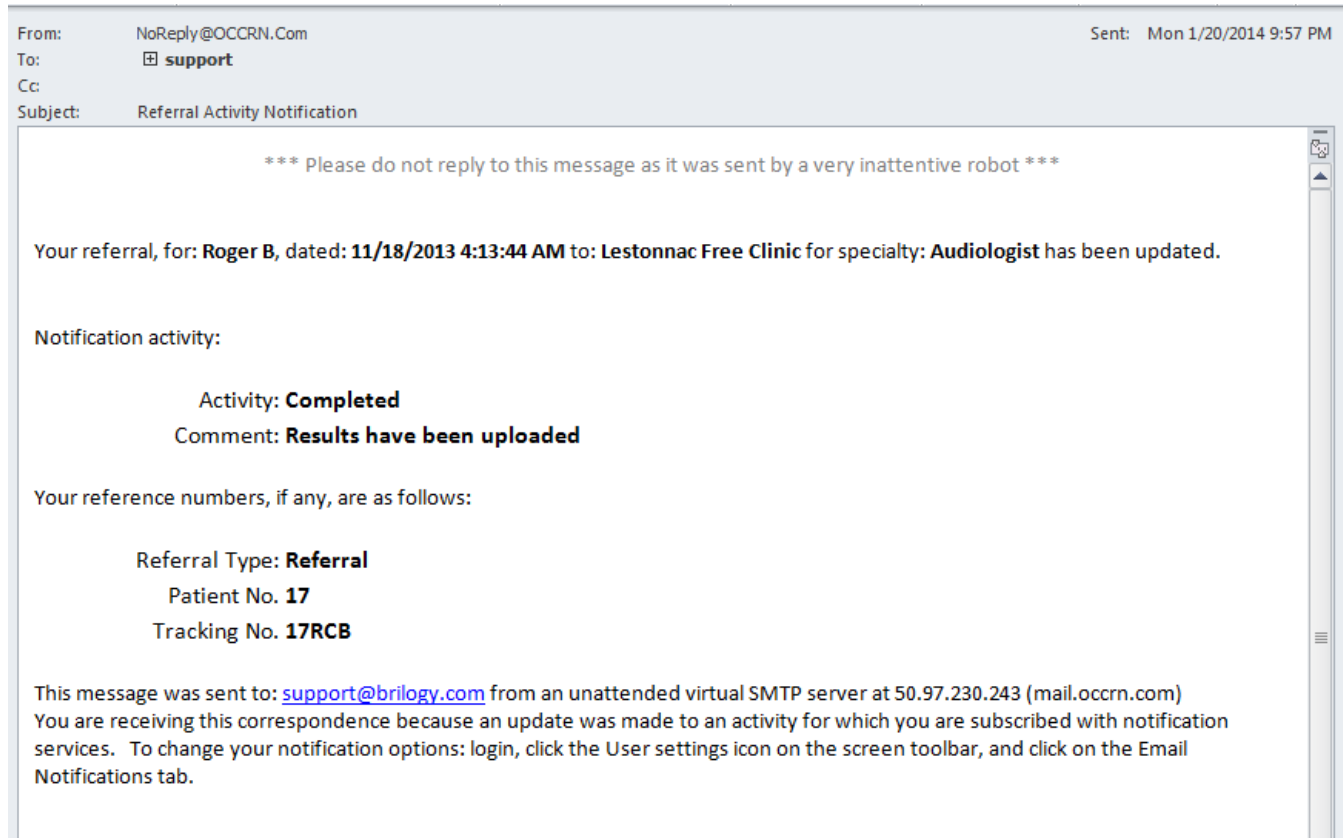
Message Inbox

| Attachment Type | Attachment Type | Attachment File Name | | | |
|---|--|---------------------------|-----------------------------|----------------------|--------------------------------|
| Message Inbox | | | | | |
| <input type="button" value="Cancel"/> | | | | | |
| Message Status: <input checked="" type="radio"/> New! <input type="radio"/> All | Date Range: <input checked="" type="radio"/> All Dates <input type="radio"/> Specify Range | Provider: ALL | | | |
| Referral Status: <input checked="" type="radio"/> Active <input type="radio"/> Closed | Start Date: Wed 01/1/2014 | End Date: Fri 01/31/2014 | | | |
| <input type="button" value="InBox"/> | <input type="button" value="Sent Items"/> | | | | |
| Message | Date | From Clinic | Create User | Patient | Subject |
| <input checked="" type="checkbox"/> | 12/09/2013 12:47 PM | North OC Regional Heal... | Juana Pantoja | 00000002, Maria T... | unable to contact this patient |
| <input type="checkbox"/> | 01/09/2014 11:48 AM | North OC Regional Heal... | Juana Pantoja | 00000002, Maria T... | Hi Juanna |
| <input type="checkbox"/> | 01/13/2014 11:24 AM | Sierra Health Center | Devon Najera LVN,Case Ma... | 00000002, Maria T... | clarification on u/s |
| <input type="checkbox"/> | 01/17/2014 2:52 PM | North OC Regional Heal... | Juana Pantoja | 00000002, Maria T... | unable to reach patient |

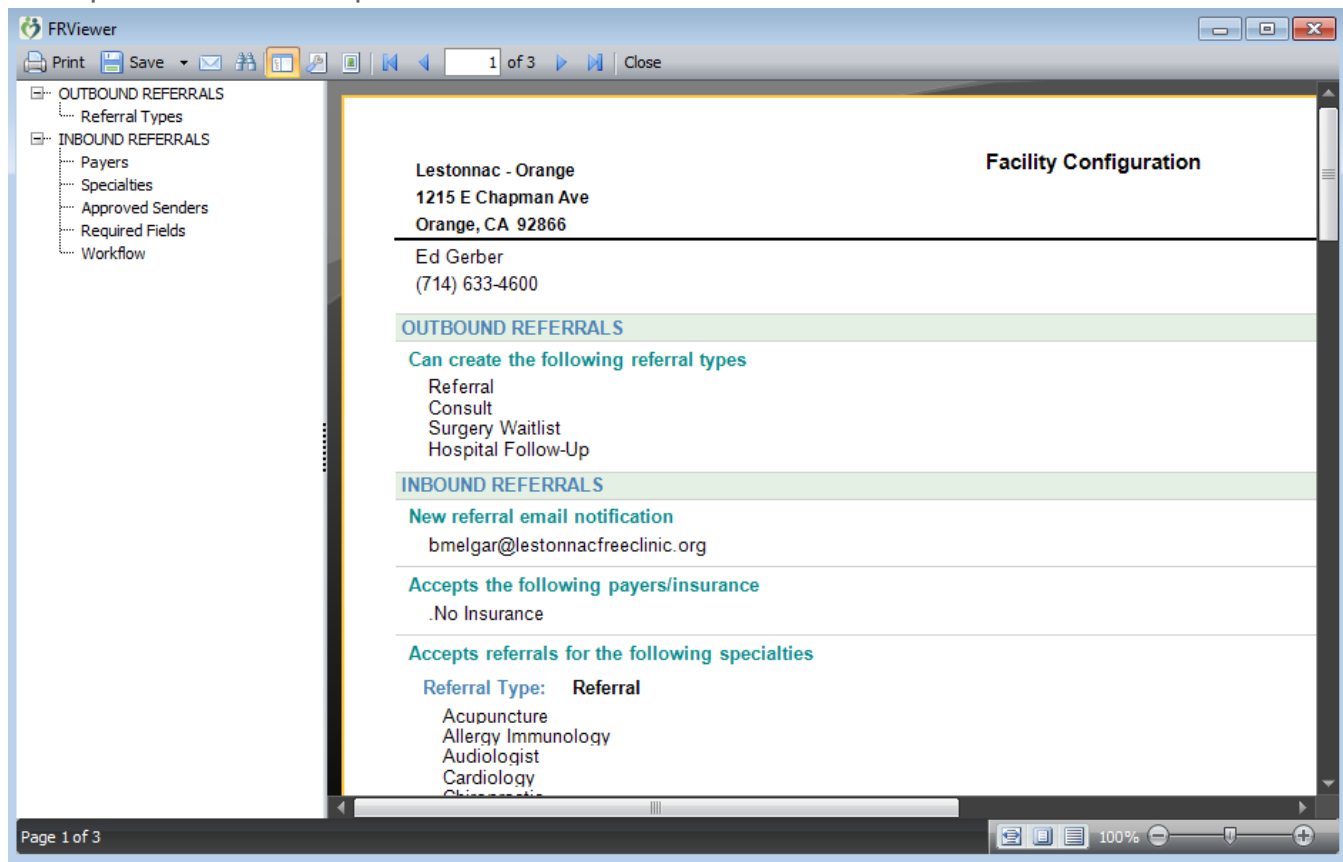
User configurable email notifications



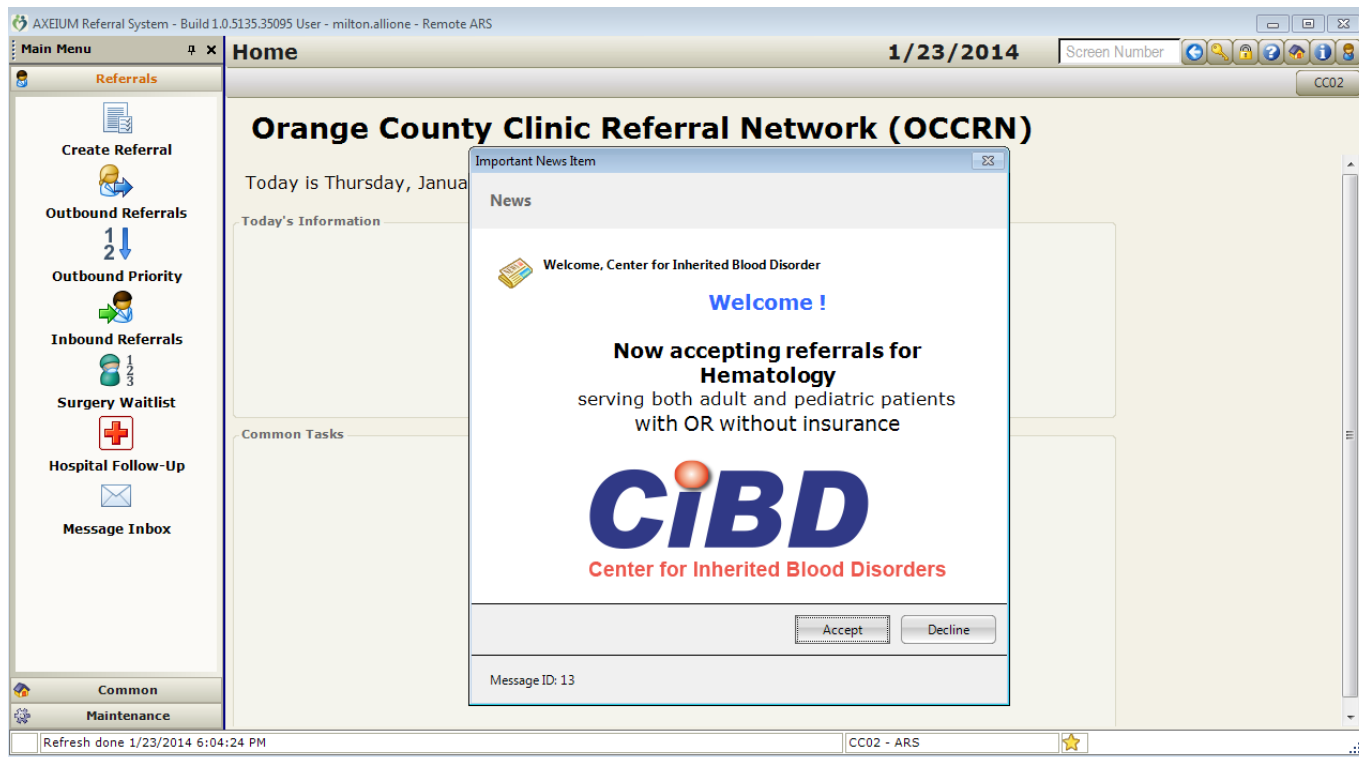
Example of completed activity email notification (opt-in)



Example of imbedded report writer viewer



Example of role-based News that is presented at login



Contact Information

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