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REFERRAL MANAGEMENT

USER GUIDE

FULFILLER

EQUIPO HEALTH INC

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EQUIPO REFERRAL MANAGEMENT – Introduction

Equipo's Referral Management Process makes referrals EASY by creating automated workflow adapted to the Partner Provider's need. The platform empowers receiving partner providers (Order Fulfillers) to improve efficiency, eliminate redundancy, and communicate effectively, thus saving time and effort. Backed by strong analytics and AI, the turnaround times can be significantly improved. Outcomes can be measured in terms of reduced no shows, drop in rejections, improved resource allocation and faster appointments.

A. Login

To login to Referral Lite, you must have received an email notification for the Order received. Please click on the View Referral button on the email received. If you do not find the email in your Inbox please do not forget to check your spam folder.

To view the Referral Order, there are three options available.

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Option 1: View Referral

1) Enter the order number received in your email notification and click the submit button. Your email id will be already displayed as shown in the following screen.

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View Referral Option 1: Enter the Order Number from your email notification Order Number* :	Equipo's Referra	al Management Platform
Email* : demo@gmail.com OTP will be sent to this email to verify your identity. Click here to view the list of all your referral(s) Option 2: New to Equipo? Activate your account Activate Now Option 3: Already have an account? Sign In Sign=In to Equipo	Reduced no shows Reduced network leakage Good patient experience	Increased operational efficiency Seamless Integration with EMR Timely Follow ups
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2) You will now be prompted to enter an OTP for verification. Enter the OTP sent to your email. Click on the submit button as shown in the following screen.

equipo		
View Referent Option 1: Enter the Order Number from Order Number*:	equipo _{Tran} Z(p	× nent Platform
M2205633491	Enhanced Security on Email verification	Increased
Email* :	For your security, we need to verify your identity.	efficiency
nada.odungattu+1@equipohealth.com		
Click here to view the list of all your referral(s)		Seamless
Activate Now	Please enter the OTP you have received in the email you have $provided^{\mathbf{r}}$:	with EMR
Option 3: Already have an account? Sig	Enter the 6-digit code	Timely Follow ups
Sign-In to Equipe	Resend OTP	
	Submit Cancel	
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3) After clicking the submit button you will be redirected to view the referral order.

equipo					
	K Back to List Stat 19-May-2022	New	All	ergy & Immunology	
	the second seco			Process Reject	
	-			Communication	
		OutPatient Reques	st		
		Allergy & Immun	ology Stat 19-May-2022	Atta	
	First Name	Last Name	Date of Birth	chmer	
	Gender S Male ○ Female ○ Not specified	Marital Status	Ethnicity	(1) 21	
	Address	Phone	Emergency Contact		
	Language	Interpreter Required O Yes 🔮 No	Patient Email	reline	
	Referring Provider	Referring Provider Email	Referring Provider NPI		
	Financial Data				
Terms of Use	Privacy Policy	Copyright © Equipo Health	2022	FOLLOW US in 🎐 f 💿 🕿 info@equipohealth.com 📞 800.	(7) Help

Option 2: Activate your Equipo Account

1) Click "Activate Now" as shown in the following screen:



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2) You will now be prompted to enter your email address. By clicking the "Generate OTP" button OTP will be generated.

equipo View Option 1: Enter the Order Num Order Number*:	equipo Trane Tipe	× ierral Management latform
Email* : OTP with Organization NPI* :	Activate Account Please provide your email for verification. If we find an account associ with the email, OTP (One Time Password) will be sent to this email	ated I.
Click here to view the list of all your refe Option 2: New to Equipo? Active	Enter the Email Generate OTP	Integration with EMR Timety Follow ups
Option 3: Already have an account of the second signal to the second signal to the second signal to the second secon	nt? Sign In Equipo	
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3) You'll now have received an OTP in the email provided. Enter the OTP and click "**Submit**"

Juipo	×	1
View Referral Option 1: Enter the Order Number from your em: Order Number* : M2205437721 Email* :	Activate Account Please provide your email for verification. If we find an account associated with the email, OTP (One Time Password) will be sent to this email.	nagement Platform
jubymoLabraham +554@equipohealth.com OTP will be sent to this email to Click here to view the list of all your referral(s) Option 2: New to Equipo? Activate your account Activate Now	demo@gmail.com	Seamless Integration with EMR Timely
Option 3: Already have an account? Sign In Sign-In to Equipo	Please enter the OTP you have received in the email you have provided* : Enter the 6-digit code Resend OTP	Follow ups
Terms of Use Privacy Policy	Submit Cancel	FOLLOW US in 🎔 f 💿 🧿 Help S info@equipohealth.com 💺 800.462.9082

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4) Your account is now Activated. Please note down your username at this point which can be used for login later on. Then, click on Continue to set your password.

equipo Trans 140		
	<image/> <image/> <image/> <image/> <image/> <image/> <section-header><section-header><section-header><section-header><text><text><text><text></text></text></text></text></section-header></section-header></section-header></section-header>	
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5) Your new password must contain Alphabets and Numerals

equip o		
	Reset Password	

This completes your account setup procedure. You will be redirected to the login screen of Equipo.

6) You can now login to Equipo using the username that you had received



and the password that you created for your account.

7) Alternatively, you will receive an email from Equipo with your Username and a link to set your password. Click on "Continue" to set a new password of your choice.

Your accour	nt has been act	ivated.		
Username : On clicking	Continue you w	vill be prompted t	o set a password	
		Conti	nue	
Regards,				

B. Order Menu and Dashboard

Once logged in, the Fulfiller will be directed to the Order Dashboard. Dashboard provides a summary view and metrics of the orders for last 7 days



equi **REFERRAL MANAGEMENT** ATFORM

equip $\bullet \equiv$	Q ~ Last Name	/First Name	×					(11)	Demo Fulfiller	D 📢 🚺 -
🐵 Dashboard	Order Receive	ed Dashboard								
🔺 Patient	🕍 My Orders (Pas	t 7 days)								C Open
🖽 Order	103	NEW	PROCESSIN	G	CANCELLED	-	REJECTED	SCHEDULED	63	PENDING INFO
Appointment		2			0		0	0		0
🚯 Engagement 🧹										
	Message Cente	er - Clinical Order							6	Refresh C Open
	Communications (0)	New Order (0) Docu	ments (0) Order Assigned (0)	Order Scheduled (0)	Order Rejected (0)	Order Cancelled (0)				
	Showing 0 to 0 of 0 e	ntries								
	Notification					Generated on				
					No data avail	able in table				
									F	revious Next
	Crder Trends	and Status (Past 7 day	s)							
			Status				Service Type		P	riority
	2		By PLOTTING Dates		3		ay orone base		by	order bate
	al Orders				2 Crders		2			

Order Statistics – (Total Counts for the Last 7 Days) a.

My Orders (Past 7 days)						C Open
(C3)	NEW 2	PROCESSING 0	CANCELLED 0	REJECTED 0	SCHEDULED 0	PENDING INFO

- Shows the current standing of all the orders placed in the last 7 days grouped by respective order status.
- Clicking on the counts will take you to the listing page of the orders.
- Clicking on the 'Open' button at the right-hand corner will take you to the listing page.

Order Trends and Status b.

The list shows the referring organization, and the count represents the number of orders received in the last 7 days.

لل Order Trends and Status (Past 7 days)							
Status By Activity Data	Service Type By Order Data	Priority By Order Date					
2 5 6 6 6 6 6 7 7 7 7 7 7 7 7 7 7 7 7 7	2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2						
- New - Scheduled - Visit Completed	0 Allergy & Immunology	Urgent					

- Quick view of the daily trend of the orders.
- Distribution of the orders by Specialty.
- Distribution of the orders by Priority.
- c. My Care Providers (Partner Referring Organizations)



d. Message Center (Referral Inbox)

Changes in the order status are updated here (in real-time), including notifications for Rejected and Canceled orders, this section works as a mailbox, once the notification is read, it will be removed. Updated physician note is also listed here for quick access as needed.



Message Center - Clinical Order	ORifrein (20o
Communications (29) New Order (19) Documents (8) Order Assigned (314) Order Scheduled (134) Order Rejected (3) Order Cancelled (1)	
Showing 1 to 29 of 29 entries	
Notification	Generated on
P219520-4667 Sup-Admin-472 (Urban Health Plan) ISAS88575 DERS88575 Completing	1 21-0C1-2021 @ 0319-47 AM
P2110/01/423 Can-Associate-1094 (Morris Heights Health Center - Burnside) SAR059535 OR759535 Message: Got it thanks:	@ 19-Oct-2021 © 11:54:52 AM
P2100688114 Olg-Associate-401 (Urban Health Plan) GER756799 HEN756799 Maxesme / doort can a Baran	m 19-DCt-2021 © 11:39:51 AM
	Previous 1 Next

e. My Order Forms

Displays the order forms (electronic order forms) that you have configured and made available to your partner referring organizations. Multiple forms can be created based on service lines. These forms will be used by the Referrer to send electronic referral orders.

☞ My Order Forms				C ² Open
Title	Description	Last Modified	Action	
OutPatient Consultation Request :	Central Registration - Community Referral Center	06-Aug-2019 04:17 AM	۰ ک	

A. Order Listing

'My Orders' is the listing page that displays all the orders. Multiple filters can be applied – Sending Partner, Priority, Order Type and Date Range.

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My	Clinical Ord	ers - Se	ent						(+ Clinical	Order
Sele	ect Facility 👻 🛛 R	eferred To	•	Select Priority 👻 Se	lect Order Type 👻 Select Ass	ignee 👻 February 26	5, 2022 - April 12, 2022	Q	C 🕇 🚣		
Ì			All	Draft New Process	sing Cancelled Rejected	Scheduled Visit	t Completed No S	how Close	ed		
Showi	ing 1 to 50 of 57 entri	ies			2	Show Pending Info 🏴	Select Tag	•	Search Name / O	rder No / MRN	×
3											
Order Number	Patient	MRN	Priority	Referred From	і Туре	Referred By	Assignee	I Order Date	 Last Modified Date 	ETA I	
P2105529782	LOR728640 RAM728640	10	Stat		Ophthalmology	Jai-Physician-752	128	23-May-2021	25-Oct-2021 08:49 AM	26-0ct-2021	
P2105204967	154568575 DE11568575 🚳	10666603	Routine		Pediatric Gastroenterology	Stu-Physician-742	Eri-Senior Associate-525	27-May-2021	22-Oct-2021 05:59 AM	17-Nov-2021	
P2108626772	ELL697728 BER697728	02780647	Routine	france at	Gastroenterology	Ric-Physician-893		10-Aug-2021	19-Oct-2021 04:09 PM	18-Nov-2021	
42108075351	1dr738529 Ala738529	10523169	Urgent		Nephrology	Mar-Physician-1285	Eri-Senior Associate-525	11-Aug-2021	19-Oct-2021 08:53 AM	02-Nov-2021	
P2109723918	KAT753931 GOU753931	1	Routine		Dermatology	Tem-Physician-3165	Eri-Senior Associate-525	07-Sep-2021	18-Oct-2021 09:51 AM	16-Nov-2021	
2109698318	BA8754168 CEE754168		Routine		Cardiology	She-Physician-601	Xia-Associate-914	10-Sep-2021	11-Oct-2021 12:44 PM	05-Nov-2021	
12109578545	0AN754014 MARTS4014 @	10734011	Urgent		Pediatric Ophthalmology	Ann-Physician-1304	Jac-Senior Associate-1044	17-Sep-2021	17-Sep-2021 02:13 PM	02-Oct-2021	
12109683841	Rolo754957 San754957 🌒	10557234	Urgent		Pediatric Cardiology	Fra-Physician-2670	Chr-Associate-1032	17-Sep-2021	28-Sep-2021 08:46 AM	12-Oct-2021	
	CR1755088 AR2755088 @	10734546	Routine		Pediatric Gastroenterology	Gin-Physician-621	Eri-Senior Associate-525	19-Sep-2021	19-Oct-2021 08:53 AM	17-Nov-2021	
P2109941816			Urgent	(Marcol 1997)	Pediatric Cardiology	Gin-Physician-621	Chr-Associate-1032	20-Sep-2021	23-Sep-2021 07:45 AM	07-0ct-2021	
P2109941816 P2109033422	VAN754109 CEP754109	10732851									
22109941816 92109033422 92109679809	VAN754109 CEP754109 VAN754109 CEP754109	10732851	Urgent	· · · ·	Pediatric Cardiology	Gin-Physician-621	Chr-Associate-1032	20-5ep-2021	23-Sep-2021 07:45 AM	07-Oct-2021	
22109941818 22109033422 22109679809 22109546008	VAN754109 CEP754109 VAN754109 CEP754109 NOE657237 ROS657237	10732851 10732851 03456289	Urgent Routine	and a second	Pediatric Cardiology General Surgery	Gin-Physician-621 Bar-Physician-1458	Chr-Associate-1032 Day-Associate-1225	20-Sep-2021 23-Sep-2021	23-Sep-2021 07:45 AM 28-Sep-2021 10:56 AM	07-0ct-2021 23-0ct-2021	
22109941818 22109933422 22109679809 22109546008 42109560702	VAN754109 CEP754109 VAN754109 CEP754109 NOE657237 RO5657237 Luc755971 Lom755971	10732851 10732851 03456289 10108520	Urgent Routine Routine	nori Al anna an Air Al an Air	Pediatric Cardiology General Surgery Oncology	Gin+Physician-621 Bar-Physician-1458 Mic-Physician-1302	Chr-Associate-1032 Day-Associate-1225 Day-Associate-1225	20-Sep-2021 23-Sep-2021 23-Sep-2021	23-Sep-2021 07:45 AM 28-Sep-2021 10:56 AM 28-Sep-2021 10:56 AM	07-0ct-2021 23-0ct-2021 23-0ct-2021	

- Navigate to orders in various statuses.
- Search orders by applying filter criteria.
- Click on the order number to go to the order details page.

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- Click on the patient's name to go to the patient chart.
- User in 'Supervisor Role' can assign associates. Bulk assign can be done by clicking the 'Select All' button or by selecting two or more orders from the list.

When two or more orders are selected, "choose action" button is enabled. Under the drop down for 'choose action', we could select 'assign' / 'unassign' (ie; bulk assign/unassign) for orders.

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										Choose an	Action -
Showing 1 to	40 of 40	entries					Select	t Tag	• Search Na	me / Order No /M	IRN X
Order Number		Patient	Priority	Referred To	Type 0	Referred By	Assignee 0	Order A	Last Modified 0 Date 0	Reason For Draft	¥
12203491	175	Lui6" Cast. MRNL	Routine	ora (12) siza) System	Not. Specified		Eun-Senior Associate-1391	09-Mar- 2022	09-Mar-2022 09:20 AM		•
12203128	981	Lat683842 Bro683842 MRN		System	Not Specified		Eun-Senior Associate-1391	09-Mar- 2022	09-Mar-2022 09:34 AM		2
12203837	569	Mar7 Sol7L MRI		System	Not Specified		Eun-Senior Associate-1391	09-Mar- 2022	09-Mar-2022 03:14 PM		
		Mar7.					Ever Barrier				

All Draft New Processing Cancelled Rejected Scheduled Visit Completed No Show Closed towing 1 to 40 of 40 entries Order Number Patient Priority Referred To Type Referred By Assigne Order Last Modified Date Close	Select Facility - Referred 1	fo - Sel	ect Priority 👻 S	elect Order Type 👻	Select Assignee 👻	February 26	, 2022 - April 12, 20	22	QOT	
choose an Action - nowing 1 to 40 of 40 entries Order Number Priority Referred To Type Referred By Assignee Order Last Modified Rt Choose an Action - Concel Concel Concel Concel Concel Concel Concel		All Draft	New Proces	ssing Cancelled	Rejected Scheo	luled Visit	Completed No	Show	Closed	
Order Patient Priority Referred To Type Referred By Assignee Order Last Modified Date Date Dif Close	lowing 1 to 40 of 40 entries						Select Tag		• Search Nar	Choose an Action -
	Order Number Patient	Priority	r 🔶 Referred To	¢ Type ¢	Referred By 🔶	Assignee	Order Date	* I	ast Modified Date	Re Cancel Dr Close
							91	/		

a. Filters

• Orders by the Referring Organization (Referrer)

My Clinical O	rders - Sei	nt										+ Clinical Order
Select Facility 🔺	Referred To	*	Select Priority	✓ Select 0	rder Type 👻	Select Assig	nee 👻 Februa	ary 26, 2022 - April	12, 2022	Q 2	; T 	
Select Facility		All	Draft New	Processing	Cancelled	Rejected	Scheduled	Visit Completed	No Show	Closed		
Demo Facility - 448												Choose an Action -
Demo Facility - 769	entries							Select Tag		• Sea	arch Name /	Order No /MRN 🗙

• Filter Orders by Priority

Stat (1 day) – within 1 day the order has to be processed.

Urgent (2 day) - within 2 days the order has to be processed.

Routine (1 week) - within 1 week the order has to be processed.

My Clinical Or	rders - Se	ent										+ Clinical Order
Select Facility 👻	Referred To	Ŧ	Select Priority 🔺	Select O	rder Type 👻	Select Assig	nee 👻 Febr	uary 26, 2022 - April	12, 2022	QC	े 🕇 📥	
			Select Priority								7	
		All	Stat (1 day)	cessing	Cancelled	Rejected	Scheduled	Visit Completed	No Show	Closed		
			Urgent (2 day)									Choose an Action -
Showing 1 to 40 of 40 e	entries		Routine (1 week)					Select Tag		• Sea	arch Name	/ Order No /MRN 🗙

• Filter Order by Order Type / Service Line

			\smile	
My Clinical Orders - Se	nt			+ Clinical Order
Select Facility 👻 Referred To	← Select Priority ← Select Order Type ← Select Ass	signee 👻 February 26	6, 2022 - April 12, 2022 🛙 🛍	Q 🖓 T 🚣
	All Draft New Pro	⊗ duled Visit	t Completed No Show	Closed
L	Select all Addiction Psychiatry Aerospace Medicine			Choose an Action -
Showing 1 to 40 of 40 entries	Allergy & Immunology		Select Tag	Search Name / Order No /MRN
Order Number 🔶 Patient	Priority Referred Asthma Specialist Audiology	Assignee	♦ Order ▲ Date	Last Modified Date Prate Praticipation For Draft Prate Praticipation Prate Praticipation Praticipa

• Filter Order by Assignee

My Clinical	Orders - S	Sent											+ Clini
Select Facility	Referred T	ō	- Select I	Priority 👻	Select (Order Type 👻	Select Assignee 🔺	February 2	26, 2022 -	April 12, 202	2	Q C T	*
		All	Draft	New Pro	ocessing	Cancelled	- Select Assignee Unassigned	luled Visi	t Comple	ted No S	how	Closed	Choose a
Showing 1 to 40 of 4	0 entries						Arg-Office Manager-3718		Select	Tag		• Search Na	ame / Order No /I
Order Number	Patient		Priority 👙	Referred	То	Туре	Bre-Office Manager-3717	Assignee		Order Date		Last Modified Date	Reason For Draft
	Lui652849			BronxCare	e Health	Not	CAR-Physician-	Eun-Senior		09-Mar-	()9-Mar-2022	

You can also filter by "Unassigned"

• Filter by date range (of Order Date)



Cunical C	raers - Se	enτ		_							<u> </u>		+ Cun	ical Order
lect Facility 👻	Referred To	Ŧ	Select	Priority	- Select O	rder Type 👻	Select Assig	nee 👻	Febr	uary 26	, 2022 - April 12, 2022 🗎	Q 2 T .	*	
		All	Draft	New	Processing	Cancelled	Rejected	Sche	duled	Visit	YTD	Closed		
	l										Last Year		Chasses	a Antina
											Past 30 Days		Choose a	n Action 👻
ving 1 to 40 of 40	entries										Past 45 Days	- Search Na	me / Order No /	MRN X
rder	Patient		Priority 4	Ref	erred To 💧	Type 🍐	Referred	Bv ≜	Assig	nee	Future Days	st Modified	Reason For	
umber					· · · ·			- · ·			This Month	ite	Draft	
12203491175	Lui652849 Cas652849		Routine	Bror	xCare Health	Not			Eun-S	enior	Last Month	Mar-2022		
	MRN: 91173072		noutine	Syst	em	Specified			Assoc	iate-13	Custom Range	20 AM		
	Lat683842			Bror	xCare Health	Not			Eun-S	enior	Apply Clear	Mar-2022		

You also have option to filter "Future" orders

BY CLICKING ON THE ORDER NUMBER, ORDER DETAILS CAN BE VIEWED

B. Order Details

View the details of the electronic order and take actions.

Colore Forth	Contract Contract	Color Pd						0.0.	1. N	
Select Facil 👻	Select Sen	Select Prie	Select O	rder 👻 Select	Assi April	l 27, 2022 - May 04, 2	022	QUT.		
	All	New	rocessing Can	celled Rejected	d Scheduled	Visit Completed	No Show	Closed		
Showing 1 to 2 of 2	entries				Show Pending Inf	o 🎮 🛛 Select Tag		• Search I	Name / Order No /	MRN
Order Number	Patient 🔶	Priority 🍦	Referred From	Туре 💠	Referred By	Rendering Provider	Assignee 👙	Order 🔒 Date	Last Modified 🔶 Date	ETA
M2205095053	Test Patient George	Urgent	Equipo Health	Allergy & Immunology	Test Referring Physician	Demo Lite Facility	-	03-May- 2022	03-May-2022 06:52 AM	05-Ma 2022
M2205398623	June Mathew	Urgent	Equipo Health BEquipo Hospital	Allergy & Immunology	CLAUDIA GONZALEZ	≗ Lite Senior Associate ₿Demo Lite Facility	-	04-May- 2022	04-May-2022 06:34 AM	06-Ma 2022
									Previous	1 Ne

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Q ~ Last Name /First Name	x Q Advanced Search + Patie	2.Patient name, DOB & MRN	
< Back to List 1. order info 8	Pen778196, Pab77	8196 24-Dec-1972 MRN : 91805163	Tag Add Tags here
4 122	02985023 Routine 28-Feb-2022	New St St Urology	3. Referrer's name &
± Order → tracesheet →	. Download options	5. Action button	Communications Attachments Timeline Forms i (3)
			8. Additional info Communications tabs
6. Referrer's logo		7. Fulfiller's logo	
	OutPatient Request		Equ-Physician-1 on 28 Feb 2022 11:01:46 AM DIAGNOSIS_MISSING,REASON_FOR_REFERRAL_MISSING,
	Referral Registration		Order Type () mismatch so mapping them to General, Missing Provider details or Unable to find
St Barr	abas Urology Routine 28-Feb	2022	match,Auto process is disabled,
First Name Pablo	Last Name Pena	Date of Birth 24-Dec-1972	
Gender ♥ Male ○ Female ○ Not specified	Marital Status ELECTRONIC	Ethnicity ORDER	
Address 185 MCCLLELLAN STREET APT 3F Bronx, NY 10456	Phone 5169884838	Emergency Contact	
Language	Interpreter Required O Yes S No	Patient Email	Type a message here
Referring Provider CARMEN COSTAS- KATZ	Referring Provider Email carmen@medalliance	Referring Provider NPI 1407918675	
Financial Data			
		-	

All action buttons are indicated in 'blue'. All download buttons are indicated in 'orange', in the above screenshot.

The left section displays the electronic order and the right section provides additional information regarding the order.

OutPatient Consultation Request		Communications Attachments Timeline Forms						
Central Registration - Community Referral Center Demo Sender 1 Neurology Routine 16-Jul-19								
Last Name CESPEDES Marital Status Not Specified	Date of Birth 10-Jan-1938	8. Additional info Tabs						
Phone 7183281022	Emergency Contact 7183281022							
Interpreter Required O Yes O No	Patient Email no-email@ccnmedicine.com							
Referring Provider Email calderon@ccnmedicine.com	Referring Provider NPI	Type a message here						
Policy Number	Policy Holder Name							
	OutPatient Consultation Request Central Registration - Community Referral Center no Sender 1 Neurology Routine 16-J Last Name CESPEDES Marital Status Not Specified Phone 7183281022 Interpreter Required O Yes O No Referring Provider Email calderon@ccnmedicine.com	OutPatient Consultation Request Central Registration - Community Referrat Center mo Sender 1 Neurology Routine 16-Jul-19 Last Name Date of Birth CESPEDES 10-Jan-1938 Marital Status Not Specified Phone Electronic Order 7183281022 Fmergency Contact 7183281022 Patient Email O' Yes ● No Referring Provider Email Referring Provider Email Referring Provider NPI calderon@ccnmedicine.com Policy Holder Name						

C. Order Lifecycle

Orders submitted by the Referrer appear under 'New'.



My Clinical Orders - Sent														+ Clinical Order
Select Facility 👻	Referred To	-	Select Priority	-	Select O	rder Type 👻	Select Assign	nee 👻	Febr	uary 26, 2022 - April 1	12, 2022		* 🕆 📥	
		All	Draft New	Pro	cessing	Cancelled	Rejected	Sched	uled	Visit Completed	No Show	Closed]	

Each order goes through one of the following life cycles:

- New Processing Scheduled Order Scheduled
- New Processing Scheduled Visit completed or No Show
- New Rejected (Patient Not Found/Insurance Not Covered/Service Not Provided)
- New Processing Rejected (Patient Rejects Appointment)
- New Reject (Insurance Not Covered/Service Not Provided)

a. Order Lifecycle - New

- i. By clicking on the order number of a 'New' order, the details can be viewed. Any additional info like supporting documents can be viewed under the Attachments tab.
- ii. New order can be canceled. Based on the selected action, order will be moved to the next level.



Key Features

a. A PDF or TIFF file of the order can be downloaded any time.



- b. Communication between the Referrer and the Fulfiller can be performed any time.
- c. Forms and Attachments can be added to the order any time.

b. Order Lifecycle - Processing

A processing order can be Scheduled or canceled.

දී 122021	150731 Routine 01-Feb-202	22 Processing	Urology				
± Order → ± Facesheet →			Cancel Order	Communications	Attachments (2)	Timeline	Forms i
			R Î	Communicatio	ons		
	OutPatient Reques	st		Equ-Physi DIAGNOSI: Order Type	cian-1 on 01 Feb 2 5_MISSING,REASON e () mismatch so m	022 9:35:57 AM _FOR_REFERRA apping them to	I IL_MISSING, o General,Auto
	Urology Routine	01-Feb-2022	- 1	process is	disabled,		
First Name	Last Name	Date of Birth 30-Sep-1984					
Gender ♥ Male ○ Female ○ Not specified	Marital Status	Ethnicity					
Address 10457, BRONX, New York, BRONX, 10457	Phone +1 9294783404	Emergency Contact					
Language	Interpreter Required O Yes O No	Patient Email		Type a message	here		
Referring Provider	Referring Provider Email	Referring Provider NPI					

c. Order Lifecycle - Scheduled

i. On Scheduled action, additional attachments like 'clinical history', 'lab results, 'PCP notes' etc can be uploaded.





< Back to List		12-Feb-1966	MRN : MRN	Tag	dd Tags here		
ළු 12108	330155 Routine 19-Aug-20	21 Scheduled	,	Nephrology			
▲ Order → ▲ Facesheet →			Repeat Order	Communications	Attachments (4)	Timeline	Forms i
				Attachments			
	OutPatient Consultation	Request		1629397040_k	irsiservi (Othe	ers)	
	Central Registration - Community Refe	rral Center		On: 19 Aug 2021 2:1	7:20 pm	Attiance	Save as tiff
	Nephrology I	Routine 19-Aug-2021					
First Name	Last Name	Date of Birth 12-Feb-1966		By: Eun-Senior Ass	rsiservi (Othe sociate-1391 Med 8-29 nm	ars) Alliance	Save as tiff
Gender ○ Male ♥ Female ○ Not specified	Marital Status	Ethnicity	- E	on 19 Aug 2021 24	oir, bu		
Address 3605 H H 10467, BRONX, New York, BRONX, 10467	Phone	Emergency Contact		Attachment Type: Clinical History	Lab Results	Others	PCP Notes
Language	Interpreter Required O Yes 👁 No	Patient Email	L	CHOOSETTIE	o ne chosen		
Referring Provider	Referring Provider Email	Referring Provider NPI					

ii. We can also, repeat the same order for a different date using 'Repeat Order'

Car - Luse manne - mise manne		
Back to List	Repeat Order - 12108330155 🖓 🖬 🔤 👘 👘	X Add Tags here
Ch 10400000455		dealers.
CE 12108330155		mrotogy
* Order - * Facesheet -	Reason Code *	munications Attachments Timeline Forms i
	Other	- (4)
	Note Max 5000 characte	ters allowed ms
	◆ / Formats - B I E Ξ Ξ ■ Ξ Ξ Ξ Ξ	
OutP	1	
Central		
s		
First Name Last		
Sei Sei		
O Male Semale O Not specified		
Address Pho		
3506 Hull Avenue Apt 3F Bronx, NY +1 64	Update Cancel	
10467, BRONX, New York, BRONX, 10467		
Language Inter	preter Required Patient Email	

d. Order Lifecycle – Rejected

Order can be Rejected. Reason Code can be selected from the drop-down for proper documentation.



Q ~ Last Name /First Name ×	Q Advanced Search + Patient		1	
K Back to List	Reject - 135401		×	Tag Add Tags here
1354(5			i	ve Endocrinology/Infertility
🛓 Order - 🔺 Facesheet -	Reason Code * Select an Option			nmunications Attachments (2) Timeline Forms
Annana and	Note	Max 5000 characters allowe 토 프 코 트 : 는 근 그 그	ed	nmunications
OutPa				Called pateint twice will try again
Reprodu				
t N Di ita ric 724	2350	Cancel		
	reter Required	Patient Email		

e. Order Lifecycle – Scheduled

i. Once Scheduled with attachments and comments, order will be moved the Scheduled status.

Order can also be repeated through 'Repeat Order'.

ර ු 121083	30155 Routine 19-Aug-2	021 Scheduled	,	m Nephrology				
▲ Order • ▲ Facesheet •			Repeat Order	Communications	Attachments (4)	Timeline	Forms	i
R			R	Communicatio	ins			
	OutPatient Consultation	Request		Cyc-Associ REQUEST	ate-515 on 19 Aug	2021 6:00:32	PM DUPLICAT	ΓE
	Central Registration - Community Ref	erral Center						
BronxCare He	alth System Nephrology	Routine 19-Aug-2021						
First Name	Last Name	Date of Birth 12-Feb-1966						
Gender ○ Male ♥ Female ○ Not specified	Marital Status	Ethnicity						
Address 3506 Hull Avenue Apt 3F Bronx, NY 10467, BRONX, New York, BRONX, 10467	Phone *1 6463162774	Emergency Contact +1 6463162774						
Language	Interpreter Required O Yes 👁 No	Patient Email		Type a message h	here			
Referring Provider LAMERCIE JEAN JACQUES	Referring Provider Email lermercic@equipo	Referring Provider NPI						
Referring Provider LAMERCIE JEAN JACQUES or alpha.equipo.io	Referring Provider Email lermercic@equipo	Referring Provider NPI						

f. Order Lifecycle – Visit Completed or No-Show



- i. Fulfiller will update the order to No-Show or Order Complete based on the visit status
- ii. A physician note needs to be uploaded if the order is moved to the Completed state.
- iii. No Show orders can be scheduled again.

Vicit Co	de *							
VISIC CO	inpleted							
ppointme	ent Date							
11/03/2	021 11:00 am							
Progres	ss Note				* Attach	ment o	r Note is i	mandatory
•	♦ Formats ▼	B I	EI	3 2	i ≡ i			ters allowed

Reaso	on Co	de *										
Ord	der N	o Show										Ť
Note									N	lax 50	00 character	rs allower
*	¢	Formats 🕶	в	I	E	Ξ	Э	iΞ	Ξ	•	Ē	
1												

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Referral Management

D. Tag Orders

Tagging is a powerful feature in Equipo Referral Management. Orders can be tagged by creating custom tags or by picking an existing tag.

Q ~ Last Name /First Name	× Q Advanced Search +	Patient	
< Back to List	HER	29874, DUL29874 14-Sep-1974 🛛 🕢	Tag In Progress × Add Tags here
22	2082019095918 Stat 22-Aug-1	9 Processing HDR Corp Allergy	& Immunology
🛓 Order 🗸 📥 Facesheet 🗸		Reject Comp	lete Communications Attachments Timeline For
Logo]	Communications
	OutPatient Consultation Re	auest	
	Central Registration - Community Referra	l Center	Create Tags on the fly
	Allergy & Immunology S	tat 22-Aug-19	
First Name DUL29874 Gender ○ Male ♥ Female ○ Not specified	Last Name HER29874 Marital Status Not Specified	Date of Birth 14-Sep-1974	
Address BRONX, NY, 10456 Language Spanish	Phone 987612345 Interpreter Required ◯ Yes ♥ No	Emergency Contact 6466202711 Patient Email DULHER14317@equipo.io	
Referring Provider Cec-Physician-136	Referring Provider Email Cec136@eguipo.io	Referring Provider NPI	
Insurance Information Primary Insurance			Type a message here
		"leam"	Ũþ
✓ Last Name /First Name	X Q Advanced Search + Pati	ent	
Back to List	TOR3483	358, ALF348358 01-Dec-1943	ck from Visting Tage Tag Add Tags here
	105524 Routine 28-Aug-19	Processing	In Progress
• Order • 🛃 Facesheet •	,	Reject Complet	e Communications Attacnments IImeline For
og o		R	Communications

E. Search Orders

Orders can be searched by Name, Order No or MRN

8	My Clinical Orders - Sent + Clinical Order
۵	Select Facility - Referred To - Select Priority - Select Order Type - Select Assignee - April 05, 2022 - April 12, 2022 📋 📿 📿 🎽 🕹
	All Draft New Processing Cancelled Rejected Scheduled
121	Showing 1 to 1 of 1 entries Select Tag * (Search Name / Order No / MRN X)
	Order Patient Priority Referred To Type Referred By Assignee Date Date Draft
	Demo Patient M2204883899 MINE: Urgent Fulfilier Psychiatry Physician EquipoBot 11-Apr-2022 PM 678954321
	Previous 1 Next
	2022 & Equipo Build V. 43126c5e6

F. NEW Order Creation 'On Behalf Of' Partner

i. Click on the +Order button

My Clinical O	rders - Se	ent										+ Clinical Order
Select Facility 👻	Referred To	×	Select Priority	▼ Select 0	rder Type 👻	Select Assign	nee 👻 🛛 Feb	ruary 26, 2022 - April 1	12, 2022	Q 2	▼ 🚣	
		All	Draft New	Processing	Cancelled	Rejected	Scheduled	Visit Completed	No Show	Closed		

ii. Search for the Patient or Create the Patient.

Provide details like Name, DOB, Insurance, MRN

New Order	+ New Patient	^				
	First Name*		Select Service Type			
	Enter First Name	Enter First Name				
Select Priority	Last Name*	Next				
	Enter Last Name					
	Middle Name	Gender				
	Enter Middle Name	Select an option \$				
	DOB	MRN				
		MRN				
	Primary Insurance Company	Policy Number				
	Select an option \$	Enter Policy Number				
	Start Date	Expiry Date				
	Preferred Contact Number					
	Enter Preferred Contact Number					
		×				

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iii. Select Service Type, Priority, Referred by provider, Referred to

ew Clinical Order									
Referral Info									
Patient :*	Search Patient	۹ 🛨	Service Type :*	Select Service Type	Ŧ				
Referred From :	MedAlliance	~	Referred To :*	Referred To	- Find Now				
Referred By Provider :*	Referring Provider	Ŧ	Referred To Facility:	Select Facility	Ŧ				
Referred From Facility :	Select Facility	•	Referred To Physician :	Referred To Physician	Ŧ				
Priority :*	Select Priority	-							

Clicking 'Save and Next' will display the Order form. Please complete the necessary details

රට 1	2202985023 Routine 28-Feb	0-2022 New 🔛	Urology							
± Order → ± Facesheet →			Cancel Order	Communications	Attachments Timeline Form (3)	s i				
				Communicati	ons					
	OutPatient Request					Equ-Physician-1 on 28 Feb 2022 11:01:46 AM DIAGNOSIS_MISSING.REASON_FOR_REFERRAL_MISSING, Order Type () mismatch so mapping them to General,Missing Provider details or Unable to find				
	Referral Registration									
	Urology Routine 28-Feb-2022									
First Name	Last Name	Date of Birth 24-Dec-1972								
Gender	Marital Status	Ethnicity								
Male O Female O Not specified										
Address	Phone	Emergency Contact								
Bronx, NY 10456										
Language	Interpreter Required	Patient Email								
	🔿 Yes 🕑 No			Type a message	here	× 1				
Referring Provider	Referring Provider Email	Referring Provider NP	I							

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G. Patient Chart - Order View

i. Patient profile can be accessed from the Order Details page or can be searched from the main menu.



- ii. Patients can be searched by Name, Date of Birth, Account Number or Contact Number.
- iii. By selecting a patient, the user can navigate to the Patient's profile.

	 Overview Assessment Care Plan Activity 	Demo Patient // E Q Female DOB: 18-Nov-1 Q Ethnicity: N/A Im Occupation: N/A Im Account #: 678954321	9 7522, 7th street , daisy valley, USA 5 (26 Yrs) Primary: +1 123456789 Emergency: N/A Policy Number: 1234567 MRN: 678954321 (Equipo Clinic) Insurer: Medicaid Pending		Recent Activity: N/A Latest Note N/A
8	 Care Team Condition Insurance Document Note Appointment 	Primary Physician: Not provided Primary Location: Equipo Clinic Referred by: Not provided Last Visit N/A No of visit: 0 (in last 12 months) No of 0	Condition: Not Mentioned Habits: Not Mentioned Vitals: Not Mentioned Lab: HDL N/A LDL N/A HbA1c N/A	Allergy: Not Mentioned Medication: Immunization: Not Mentioned	Programs: No Details provided Service Category: Not Mentioned Measures: Not Mentioned

 iv. Based on the extent of EHR/EMR integration, patient information can be viewed. The 'Order' tab under Patient profile will have the details of all the Orders for the Patient.

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	Allergy Immunization Message (* IVR	Order	Demo Patient P Female DOB: 18-No Dethnicity: N/A Coccupation: N/A Account #: 6789543	₽ v-1995 (26 Yrs) 21 ∐ MRN: 6789!	Q 7522, Primary Emerge Policy I Insurer	♥ 7522, 7th street , daisy valley, USA Primary: +1 123456789 Emergency: N/A Policy Number: 1234567 Insurer: Medicaid Pending			Recent Activity: N/A Latest Note N/A + Clinical Order		
	C Charge Order Patient Engagement D Device	Order Number	Type 🔶 Addiction Psychiatry	Sender 🔶 Equipo Health	Referred to	Referred to Facility	Referred to Provider	Category 🗸	Status 🔶 Draft	Creation Date	Action
57.	 Habit Notification 2022 © Equipo Build V. 4312dc6 	ie6								Previous	



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