

Pending Outside Visits to be Scheduled



Course Overview

Use Pending Outside Visits to be Scheduled to review and schedule outside patient visits. This workflow allows users to coordinate referrals and ensure appointments are scheduled with outside providers.

This guide explains how to access the referral screen and schedule outside visits in CorrecTek Spark.

Use This Guide When

- Reviewing Pending Outside Visits to be Scheduled
- Scheduling an outside specialist, clinic, or hospital visit
- Handling situations when an outside visit cannot be scheduled.

What You'll Be Able to Do

- Access Pending Outside Visits queue
- Select, search, or add an external referral contact
- Enter appointment dates, times, and durations
- Attach relevant health records or external documents to a referral
- Route an incomplete task with a documented operation reason if scheduling fails

Pending Outside Visits to be Scheduled



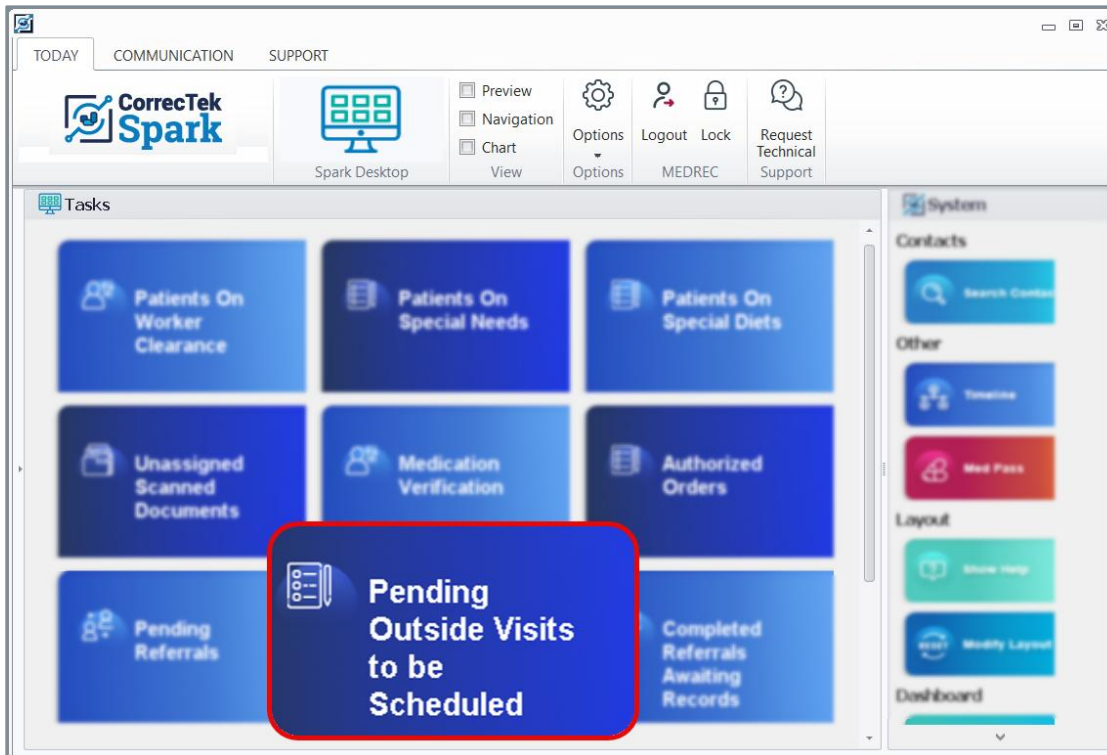
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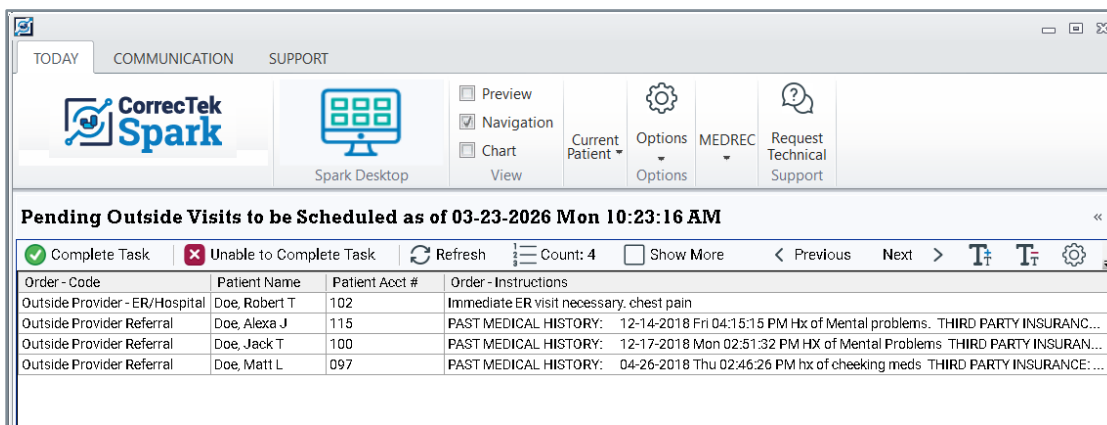
Pending Outside Visits to be Scheduled

Spark Desktop

From the Spark Desktop, click **Pending Outside Visits to be Scheduled**.



A grid opens displaying all patients with active, pending outside referrals.



The screenshot shows the Spark Desktop interface with the 'Pending Outside Visits to be Scheduled' grid open. The grid displays a list of patients with active, pending outside referrals. The grid includes a header row with columns for 'Order - Code', 'Patient Name', 'Patient Acct #', and 'Order - Instructions'. The grid also includes a toolbar with buttons for 'Complete Task', 'Unable to Complete Task', 'Refresh', 'Count: 4', 'Show More', 'Previous', 'Next', and 'Settings'.

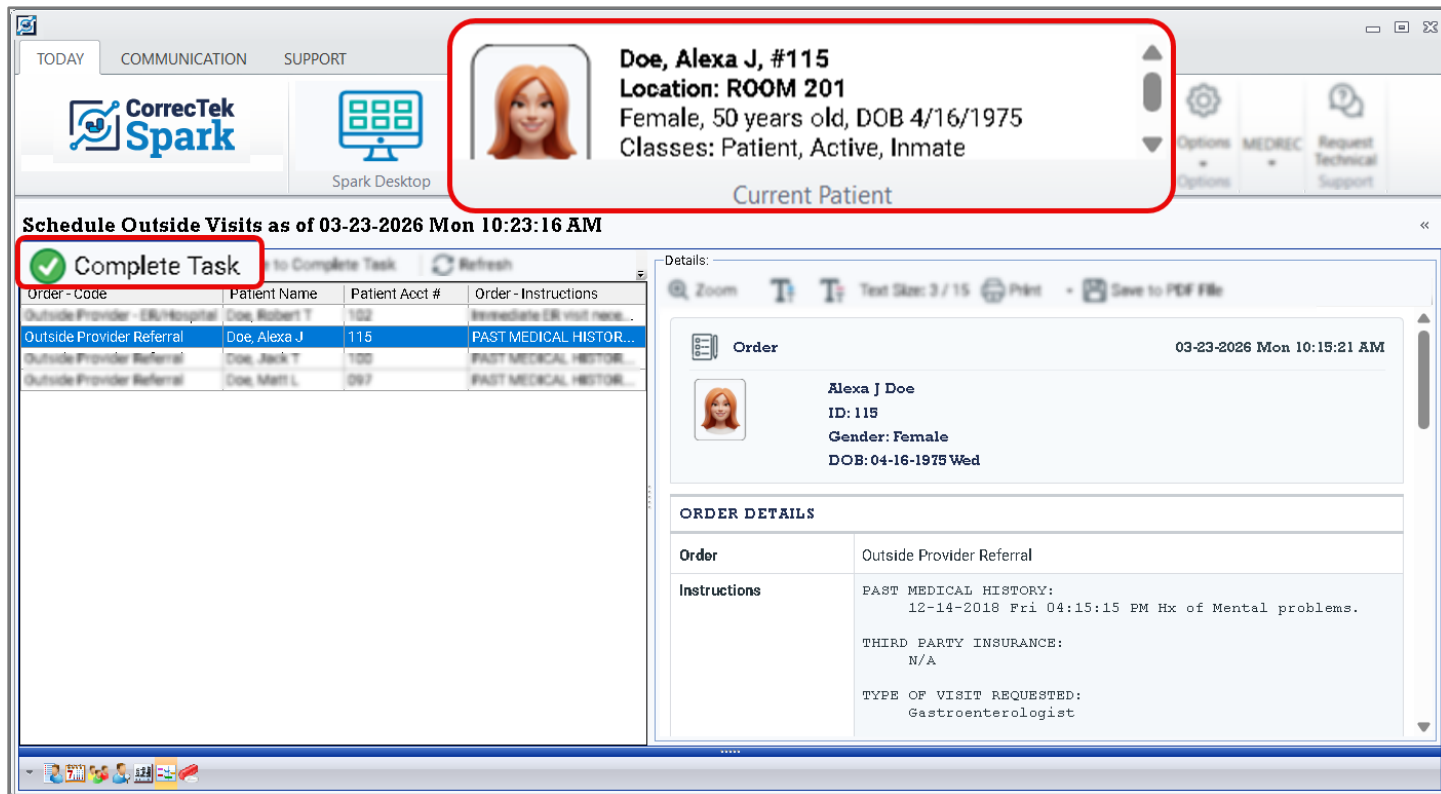
Order - Code	Patient Name	Patient Acct #	Order - Instructions
Outside Provider - ER/Hospital	Doe, Robert T	102	Immediate ER visit necessary. chest pain
Outside Provider Referral	Doe, Alexa J	115	PAST MEDICAL HISTORY: 12-14-2018 Fri 04:15:15 PM Hx of Mental problems. THIRD PARTY INSURANC...
Outside Provider Referral	Doe, Jack T	100	PAST MEDICAL HISTORY: 12-17-2018 Mon 02:51:32 PM HX of Mental Problems THIRD PARTY INSURAN...
Outside Provider Referral	Doe, Matt L	097	PAST MEDICAL HISTORY: 04-26-2018 Thu 02:46:26 PM hx of checking meds THIRD PARTY INSURANCE: ...

Pending Outside Visits to be Scheduled

To schedule the referral, highlight the target patient from the queue.

Click **Complete Task** on the toolbar.

| Tip: Review the split-screen details panel for referral information.



The screenshot displays the CorrecTek Spark Desktop interface. At the top, there are tabs for TODAY, COMMUNICATION, and SUPPORT. The main area is divided into two sections. On the left, a table lists pending outside visits. The first row is highlighted, showing a referral for Doe, Alexa J. On the right, a details panel for the selected patient is shown, including their name, location, and medical history. A red box highlights the 'Complete Task' button in the toolbar and the patient's name in the queue table.

Schedule Outside Visits as of 03-23-2026 Mon 10:23:16 AM

Order - Code	Patient Name	Patient Acct #	Order - Instructions
Outside Provider - ER/Hospital	Doe, Robert T	102	Immediate ER visit necess...
Outside Provider Referral	Doe, Alexa J	115	PAST MEDICAL HISTOR...
Outside Provider Referral	Doe, Jack T	100	PAST MEDICAL HISTOR...
Outside Provider Referral	Doe, Matt L	097	PAST MEDICAL HISTOR...

Complete Task | To Complete Task | Refresh

Details:

Order 03-23-2026 Mon 10:15:21 AM

Alexa J Doe
ID: 115
Gender: Female
DOB: 04-16-1975 Wed

ORDER DETAILS

Order	Instructions
Outside Provider Referral	PAST MEDICAL HISTORY: 12-14-2018 Fri 04:15:15 PM Hx of Mental problems. THIRD PARTY INSURANCE: N/A TYPE OF VISIT REQUESTED: Gastroenterologist

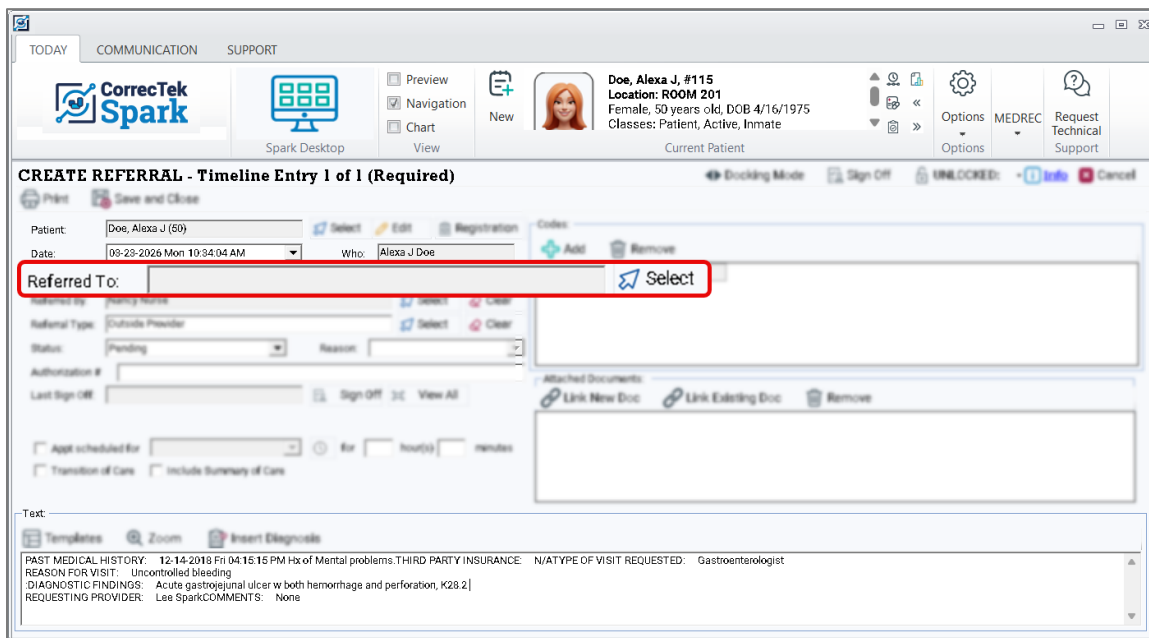
| Tip: When a patient appears in the **Current Patient** window, you can access their **MAR, Timeline, Registration** and **Reports**.

For more information on workflow buttons, see the Workflow Buttons reference.

Pending Outside Visits to be Scheduled

Create Referral

The Create Referral screen opens. Click **Select** in the Referred To field to launch the Search Contact window.



CREATE REFERRAL - Timeline Entry 1 of 1 (Required)

Patient: Doe, Alexa J (50) **Select** **Edit** **Registration** **Codes** **Add** **Remove**

Date: 09-29-2026 Mon 10:34:04 AM **Who:** Alexa J Doe **Select**

Referred To: **Select**

Referred by: **Select** **Clear**

Referral Type: **Select** **Clear**

Status: Pending **Reason:** **Select**

Authorization #: **Sign Off** **View All**

Last Sign Off: **Sign Off** **View All**

☐ Appt scheduled for **For** **Hours** **minutes**

☐ Transition of Care ☐ Include Summary of Care

Attached Documents: **Link New Doc** **Link Existing Doc** **Remove**

Text: **Templates** **Zoom** **Insert Diagnosis**

PAST MEDICAL HISTORY: 12-14-2018 Fri 04:15:15 PM Hx of Mental problems THIRD PARTY INSURANCE: N/A TYPE OF VISIT REQUESTED: Gastroenterologist
REASON FOR VISIT: Uncontrolled bleeding
DIAGNOSTIC FINDINGS: Acute gastroyejunal ulcer w both hemorrhage and perforation, K28.2
REQUESTING PROVIDER: Lee Spark COMMENTS: None

| Tip: Review the **Text** field for any specific clinical notes regarding the referral request.

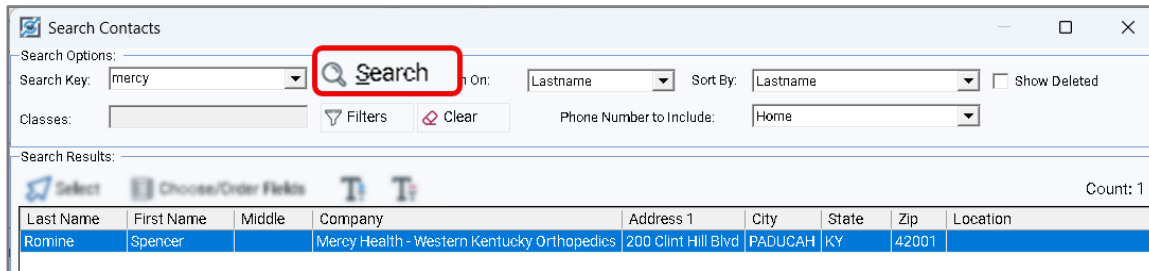
For more information, please see the Create Referral reference.

Search Contact

Use the **Search Key** field to type identifiable information to locate a contact. Then, click **Search**.

| Tip: Identifiable information could include company name, provider last name, or phone number.

Pending Outside Visits to be Scheduled



Search Contacts

Search Options:

Search Key: **Search** Search On: Sort By: ☐ Show Deleted

Classes: Phone Number to Include:

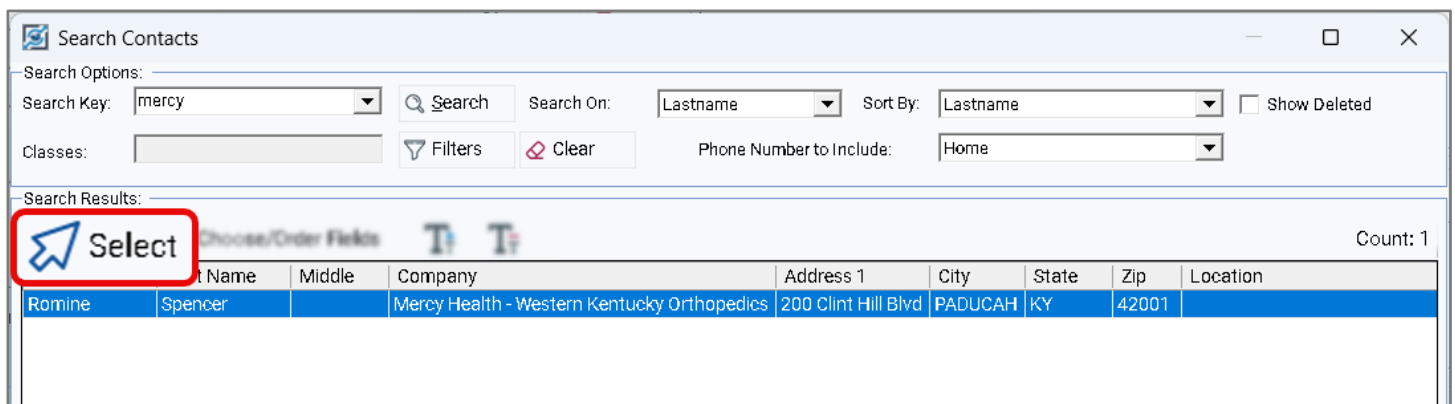
Search Results:

Count: 1

Last Name	First Name	Middle	Company	Address 1	City	State	Zip	Location
Romine	Spencer		Mercy Health - Western Kentucky Orthopedics	200 Clint Hill Blvd	PADUCAH	KY	42001	

Select Contact

Locate and highlight the correct contact from the generated search results. Click **Select** to return to the Create Referral screen.



Search Contacts

Search Options:

Search Key: **Search** Search On: Sort By: ☐ Show Deleted

Classes: Phone Number to Include:

Search Results:

Select

Count: 1

Last Name	First Name	Middle	Company	Address 1	City	State	Zip	Location
Romine	Spencer		Mercy Health - Western Kentucky Orthopedics	200 Clint Hill Blvd	PADUCAH	KY	42001	

Tip: If the specialist or clinic is not in the system roster, you must add them as a new contact before proceeding.

Click **Appt scheduled for** field.

Pending Outside Visits to be Scheduled

CREATE REFERRAL - Timeline Entry 1 of 1 (Required)

Print Save and Close

Patient: Doe, Alexa J (50) Select Edit Registration

Date: 03-23-2026 Mon 10:34:04 AM Who: Alexa J Doe

Referred To: Spencer Romine, Mercy Health - Western Kentucky Orthoped Select Clear

Referred By: Nancy Norris Select Clear

Referral Type: Outside Provider Select Clear

Status: Pending Reason: Reason

Authorization #

Last Sign Off Sign Off View All

☐ Appt scheduled for for hour(s) minutes

Transition of Care Include Summary of Care

Codes

Add Remove

Type	Code	Description
------	------	-------------

Attached Documents

Link New Doc Link Existing Doc Remove

Text

Templates Zoom Insert Diagnosis

PAST MEDICAL HISTORY: 12-14-2018 Fri 04:15:15 PM Hx of Mental problems. THIRD PARTY INSURANCE: N/A TYPE OF VISIT REQUESTED: Gastroenterologist

REASON FOR VISIT: Uncontrolled bleeding

DIAGNOSTIC FINDINGS: Acute gastroduodenal ulcer w both hemorrhage and perforation, K28.2

REQUESTING PROVIDER: Lee Spark COMMENTS: None

Click the **drop-down** arrow to open the interactive calendar and select the confirmed Appointment Date.

CREATE REFERRAL - Timeline Entry 1 of 1 (Required)

Print Save and Close

Patient: Doe, Alexa J (50) Select Edit Registration

Date: 03-23-2026 Mon 10:34:04 AM Who: Alexa J Doe

Referred To: Spencer Romine, Mercy Health - Western Kentucky Orthoped Select Clear

Referred By: Nancy Norris Select Clear

Referral Type: Outside Provider Select Clear

Status: Pending Reason: Reason

Authorization #

Last Sign Off Sign Off View All

☒ Appt scheduled for for hour(s) minutes

Transition of Care Include Summary of Care

Codes

Add Remove

Type	Code	Description
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Attached Documents

Link New Doc Link Existing Doc Remove

Text

Templates Zoom Insert Diagnosis

PAST MEDICAL HISTORY: 12-14-2018 Fri 04:15:15 PM Hx of Mental problems. THIRD PARTY INSURANCE: N/A TYPE OF VISIT REQUESTED: Gastroenterologist

REASON FOR VISIT: Uncontrolled bleeding

DIAGNOSTIC FINDINGS: Acute gastroduodenal ulcer w both hemorrhage and perforation, K28.2

REQUESTING PROVIDER: Lee Spark COMMENTS: None

Click the **Clock** icon to open the time picker and select the exact Appointment Time.

Pending Outside Visits to be Scheduled

CREATE REFERRAL - Timeline Entry 1 of 1 (Required)

Print Save and Close Docking Mode Sign Off UNLOCKED: Info Cancel

Patient: Doe, Alexa J (50) Select Edit Registration
Date: 09-23-2026 Mon 10:34:04 AM Who: Alexa J Doe
Referred To: Spencer Romine, Mercy Health - Western Kentucky Orthoped Select Clear
Referred By: Nancy Nurse Select Clear
Referral Type: Outside Provider Select Clear
Status: Pending Reason:
Authorization #
Last Sign Off: Sign Off View All
☒ Appt scheduled for 09-26-2026 Thu 10:34 AM  ☐ hour(s) ☐ minutes
☐ Transition of Care ☐ Include Summary of Care
Codes: Add Remove
Type Code Description
Attached Documents: Link New Doc Link Existing Doc Remove
Text: Templates Zoom Insert Diagnosis
PAST MEDICAL HISTORY: 12-14-2018 Fri 04:15:15 PM Hx of Mental problems. THIRD PARTY INSURANCE: N/A TYPE OF VISIT REQUESTED: Gastroenterologist
REASON FOR VISIT: Uncontrolled bleeding
DIAGNOSTIC FINDINGS: Acute gastrojejunal ulcer w both hemorrhage and perforation, K28.2
REQUESTING PROVIDER: Lee Spark COMMENTS: None

Select the **appointment time**.

Select an Appointment Time X

Times: ☐ Show Evening ☐ Show Night

Morning	07:00	07:15	07:30	07:45	08:00	08:15
	08:30	08:45	09:00	09:15	09:30	09:45
	10:00	10:15	10:30	10:45	11:00	11:15
	11:30	11:45	12:00	12:15	12:30	12:45
Afternoon	01:00	01:15	01:30	01:45	02:00	02:15
	02:30	02:45	03:00	03:15	03:30	03:45
	04:00	04:15	04:30	04:45	05:00	05:15

Enter the duration of the appointment.

Pending Outside Visits to be Scheduled



CREATE REFERRAL - Timeline Entry 1 of 1 (Required)

Print Save and Close Docking Mode Sign Off UNLOCKED: Info Cancel

Patient: Doe, Alexa J (50) Select Edit Registration
Date: 03-23-2026 Mon 10:34:04 AM Who: Alexa J Doe
Referred To: Spencer Romine, Mercy Health - Western Kentucky Orthoped Select Clear
Referred By: Nancy Nurse Select Clear
Referral Type: Outside Provider Select Clear
Status: Pending Reason:
Authorization #
Last Sign Off: Sign Off View All

Codes
Add Remove
Type Code Description

Attached Documents
Link New Doc Link Existing Doc Remove

☒ Appt scheduled for 03-26-2026 Thu 09:15 AM for hour(s) minutes
☐ Transition of Care ☐ Include Summary of Care

Text
Templates Zoom Insert Diagnosis

PAST MEDICAL HISTORY: 12-14-2018 Fri 04:15:15 PM Hx of Mental problems. THIRD PARTY INSURANCE: N/A TYPE OF VISIT REQUESTED: Gastroenterologist
REASON FOR VISIT: Uncontrolled bleeding
DIAGNOSTIC FINDINGS: Acute gastrojejunal ulcer w both hemorrhage and perforation, K28.2
REQUESTING PROVIDER: Lee Spark COMMENTS: None

Attached Documents

If the outside provider requires clinical charts or prior labs, choose an option within the Attached Documents area:

- **Link New Doc** – Attaches a new external document that has been scanned into a local facility folder.
- **Link Existing Doc** – Opens the patient's existing electronic chart to select and pull a document directly from their Timeline.

Pending Outside Visits to be Scheduled

CREATE REFERRAL - Timeline Entry 1 of 1 (Required)

Print Save and Close

Patient: Doe, Alexa J (50) Select Edit Registration
Date: 09-23-2026 Mon 10:34:04 AM Who: Alexa J Doe
Referred To: Spencer Romine, Mercy Health - Western Kentucky Orthoped Select Clear
Referred By: Nancy Morris Select Clear
Referral Type: Outside Provider Select Clear
Status: Pending Reason:
Authorization #
Last Sign Off: Sign Off View All

Codes: Add Remove
Type Code Description

Attached Documents: Link New Doc Link Existing Doc

☒ Appt scheduled for 09-26-2026 Thu 09:15 AM for 45 hour(s) 45 minutes
☐ Transition of Care ☐ Include Summary of Care

Text: Templates Zoom Insert Diagnosis

PAST MEDICAL HISTORY: 12-14-2018 Fri 04:15:15 PM Hx of Mental problems. THIRD PARTY INSURANCE: N/A TYPE OF VISIT REQUESTED: Gastroenterologist
REASON FOR VISIT: Uncontrolled bleeding
DIAGNOSTIC FINDINGS: Acute gastroduodenal ulcer w both hemorrhage and perforation, K28.2
REQUESTING PROVIDER: Lee Spark COMMENTS: None

Complete the Referral

Click Review the entire template screen for accuracy, then click **Save and Close**.

CREATE REFERRAL - Timeline Entry 1 of 1 (Required)

Print **Save and Close**

Patient: Doe, Alexa J (50) Select Edit Registration
Date: 09-23-2026 Mon 10:34:04 AM Who: Alexa J Doe
Referred To: Spencer Romine, Mercy Health - Western Kentucky Orthoped Select Clear
Referred By: Nancy Morris Select Clear
Referral Type: Outside Provider Select Clear
Status: Pending Reason:
Authorization #
Last Sign Off: Sign Off View All

Codes: Add Remove
Type Code Description

Attached Documents: Link New Doc Link Existing Doc Remove

☒ Appt scheduled for 09-26-2026 Thu 09:15 AM for 45 hour(s) 45 minutes
☐ Transition of Care ☐ Include Summary of Care

Text: Templates Zoom Insert Diagnosis

PAST MEDICAL HISTORY: 12-14-2018 Fri 04:15:15 PM Hx of Mental problems. THIRD PARTY INSURANCE: N/A TYPE OF VISIT REQUESTED: Gastroenterologist
REASON FOR VISIT: Uncontrolled bleeding
DIAGNOSTIC FINDINGS: Acute gastroduodenal ulcer w both hemorrhage and perforation, K28.2
REQUESTING PROVIDER: Lee Spark COMMENTS: None

Pending Outside Visits to be Scheduled

Add Treatment

The Add Treatment dialog box opens to confirm that the user was able to complete the tasks as expected.

Click **Save and Close** inside this dialog box to verify the data and return to the Pending Outside Visits to be Scheduled list.



ADD TREATMENT

Would you like to complete this order as directed?

Order: Outside Provider Referral

☒ YES ☐ If 'No', Select Reason

Comments:

Date: 03-23-2026 Mon Shift: AM Select

Timeline Entries

Category	Details	Required?	Condition	Create
Referral w/Instructions	Outside Provider	Yes	Yes Treatment	Yes

Order: 03-23-2026 Mon 10:15:21 AM

Alexa J Doe
ID: 115
Gender: Female
DOB: 04-16-1975 Wed

ORDER DETAILS

Order: Outside Provider Referral

Instructions

PAST MEDICAL HISTORY:
12-14-2018 Fri 04:15:15 PM Hx of Mental problems.

THIRD PARTY INSURANCE:
N/A

TYPE OF VISIT REQUESTED:
Gastroenterologist

REASON FOR VISIT:
Uncontrolled bleeding

PHYSICIAN FINDINGS:

Unable to Complete Task

Use this workflow if an appointment cannot be scheduled due to institutional lockdown, provider unavailability, or patient non-compliance.

Highlight the target patient within the queue, then click **Unable to Complete Task** on the toolbar.

Pending Outside Visits to be Scheduled

Schedule Outside Visits as of 03-23-2026 Mon 10:23:16 AM

Complete Task **Unable to Complete Task**

Order - Code	Patient Name	Patient Acct #	Order - Instructions
Outside Provider - ER/Hospital	Doe, Robert T	102	Immediate ER visit necessary...
Outside Provider Referral	Doe, Alexa J	115	PAST MEDICAL HISTORY: ...
Outside Provider Referral	Doe, Jack T	100	PAST MEDICAL HISTORY: ...
Outside Provider Referral	Doe, Matt L	097	PAST MEDICAL HISTORY: ...

Details:

Order 03-23-2026 Mon 10:17:34 AM

Robert T Doe
ID: 102
Gender: Male
DOB: 08-17-1957 Sat

ORDER DETAILS

Order	Outside Provider - ER / Hospital
Instructions	Immediate ER visit necessary. chest pain
Pattern	

ORDER STATUS

Unable to Perform Order

The Unable to Perform Order screen opens.

Click the **If 'No', Select Reason** button.

UNABLE TO PERFORM ORDER

Save and Close Cancel

Were you able to complete this order as directed?

Order: Outside Provider - ER / Hospital

☐ YES ☒ NO **If 'No', Select Reason**

Comments:

Templates Zoom

Date: 03-23-2026 Mon Shift: AM Select

Order 03-23-2026 Mon 10:17:34 AM

Robert T Doe
ID: 102
Gender: Male
DOB: 08-17-1957 Sat

ORDER DETAILS

Order	Outside Provider - ER / Hospital
Instructions	Immediate ER visit necessary. chest pain
Pattern	

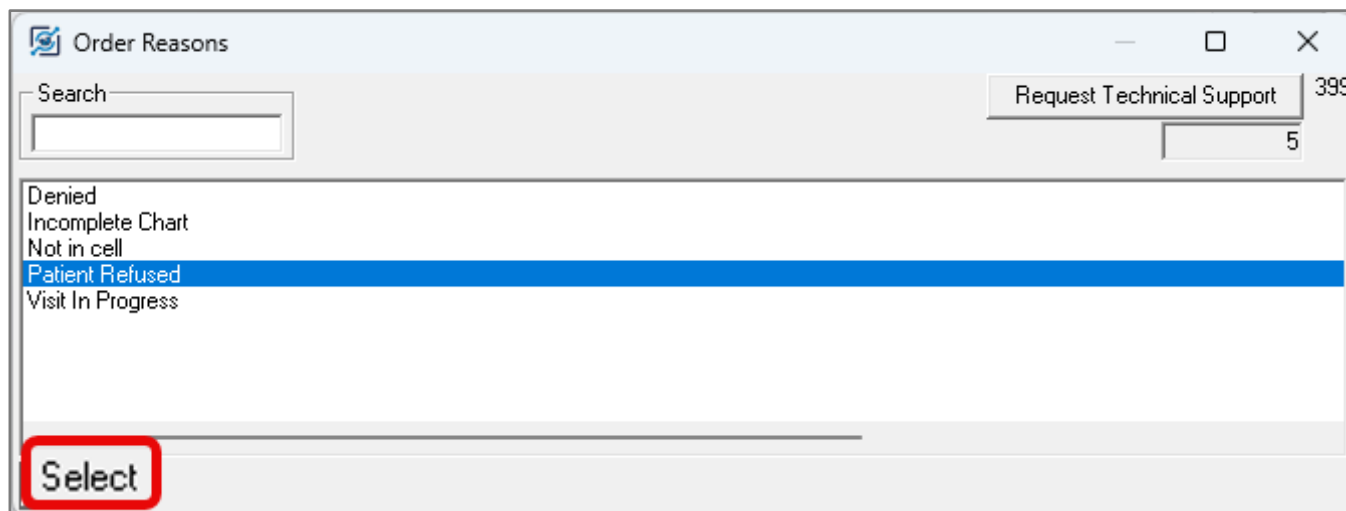
ORDER STATUS

Status	Pending
Approval Status	Pending
Approved/Rejected On	
Approved/Rejected	

Select the accurate operational **Reason** from the system dropdown.

Click **Select** to return to the Unable to Perform screen.

Pending Outside Visits to be Scheduled



Order Reasons

Search

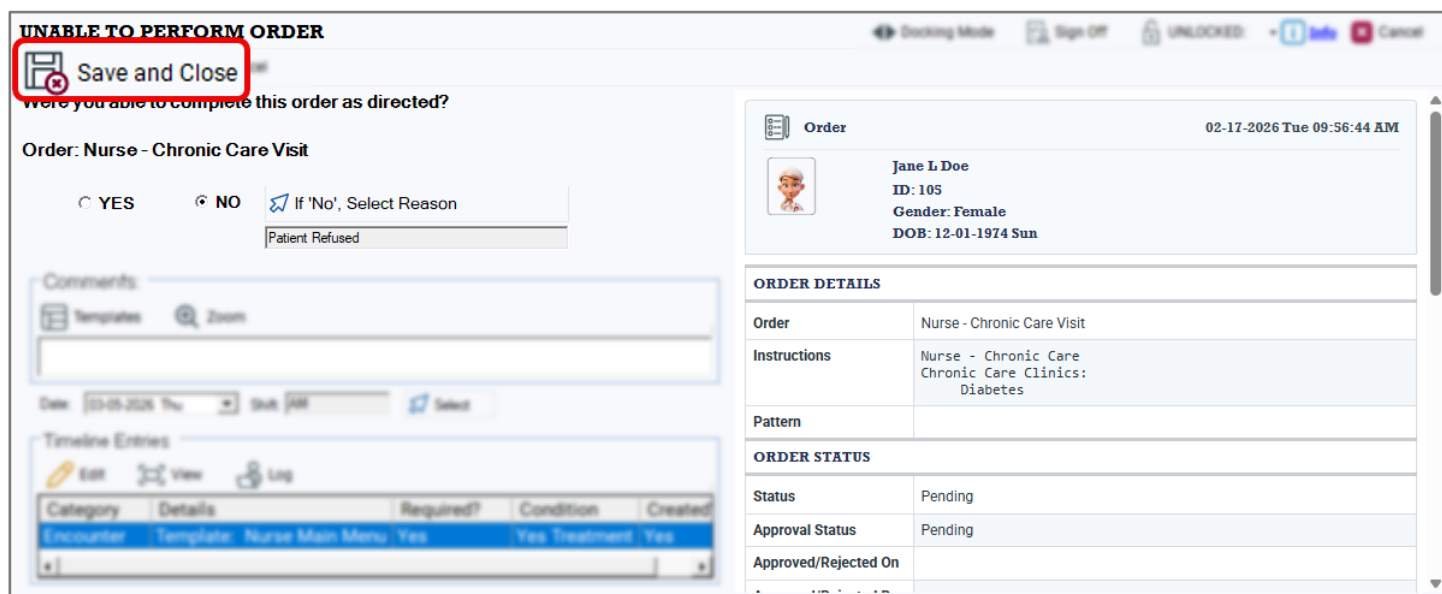
Request Technical Support 399

5

Denied
Incomplete Chart
Not in cell
Patient Refused
Visit In Progress

Select

Click **Save and Close** to return to the Pending Outside Visits to be Scheduled list.



UNABLE TO PERFORM ORDER

Save and Close

Were you able to complete this order as directed?

Order: Nurse - Chronic Care Visit

☐ YES ☒ NO If 'No', Select Reason

Patient Refused

Comments:

Templates Zoom

Date: 02-05-2026 Thu 08:00 AM Select

Timeline Entries

Edit View Log

Category	Details	Required?	Condition	Created
Encounter	Template: Nurse Main Menu	Yes	Yes Treatment	Yes

Order

02-17-2026 Tue 09:56:44 AM

Jane I. Doe
ID: 105
Gender: Female
DOB: 12-01-1974 Sun

ORDER DETAILS

Order	Nurse - Chronic Care Visit
Instructions	Nurse - Chronic Care Chronic Care Clinics: Diabetes
Pattern	

ORDER STATUS

Status	Pending
Approval Status	Pending
Approved/Rejected On	

Return to Spark Desktop

Click **Spark Desktop** on the main navigation bar to exit the module and return to the desktop.

Pending Outside Visits to be Scheduled



CorrecTek Spark

Preview
Navigation
Chart
View

New

Doe, Alexa J, #115
Location: ROOM 201
Female, 50 years old, DOB 4/16/1975
Classes: Patient, Active, Inmate

Options
MEDREC
Request Technical Support

Current Patient

Schedule Outside Visits as Spark Desktop 10:23:16 AM

Order - Code	Patient Name	Patient Acct #	Order - Instructions
Outside Provider Referral	Doe, Robert T	102	Immediate ER visit nee...
Outside Provider Referral	Doe, Alexa J	115	FAST MEDICAL HISTOR...
Outside Provider Referral	Doe, Jack T	100	FAST MEDICAL HISTOR...
Outside Provider Referral	Doe, Matt L	097	FAST MEDICAL HISTOR...

Details:

Order 03-23-2026 Mon 10:15:21 AM

Alexa J Doe
ID: 115
Gender: Female
DOB: 04-16-1975 Wed

ORDER DETAILS

Order
Outside Provider Referral

Related Courses

- Initiate Order
- Add Contact
- External Documents (Non-Hosted)
- Unassigned Patient Documents (Hosted)
- Timeline

Pending Outside Visits to be Scheduled



Reference Page

Workflow Buttons

Refresh: Refreshes the list and removes completed items.

Find: Searches the list for a keyword.

Previous: Finds the previous matching keyword.

Next: Finds the next matching keyword.

T+: Increases the font size.

T-: Decreases the font size.

Grid Options: Adjusts column size and word wrap.

Details: Displays an item's details.

Print Report: Prints the list.

Run With New Dates: Run the report using a different date range.

Zoom: Opens the details in a new window.

Print: Opens print options.

Save to PDF File: Saves the details as a PDF.

[Return to Spark Desktop.](#)

Create Referral

Authorization #: Enter an authorization number.

Code: Click **Add** to attach a code.

Summary of Care: Attaches a Summary of Care.

Pending Outside Visits to be Scheduled



[Return to Create Referral.](#)