



Application: EpicCare Link

Affected Role: EpicCare Link Referral Users

Revision Date: 4/15/2022

Epic Version: May 2021

Place a Trinity Health Clinic Referral Order

- Navigate to Order Entry** via one of the following methods:
 - EpicCare Link homepage > Select Place Order > Select patient from list
 - From within patient's chart, select Order Entry from the dropdown menu of more options.
- Select an **authorizing provider** from the dropdown list and select Accept.
- Select the appropriate **Referral to...** option via one of the following search methods:
 - Search "referral to" in the New Procedure search field > Select the desired referral option
 - Open the preference list> Select Referrals from the left panel> select the desired referral option.
- Fill out the required fields**, as appropriate for the referral.

Ambulatory referral to Cardiology

Referral: Priority: Routine Urgent Elective

Reason: Specialty Se... Consult and ... Co-Managemen... Perform Proc...

To dept:

To dept spec:

To provider:

Address

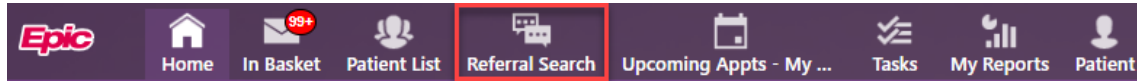
To prov spec:

By provider:

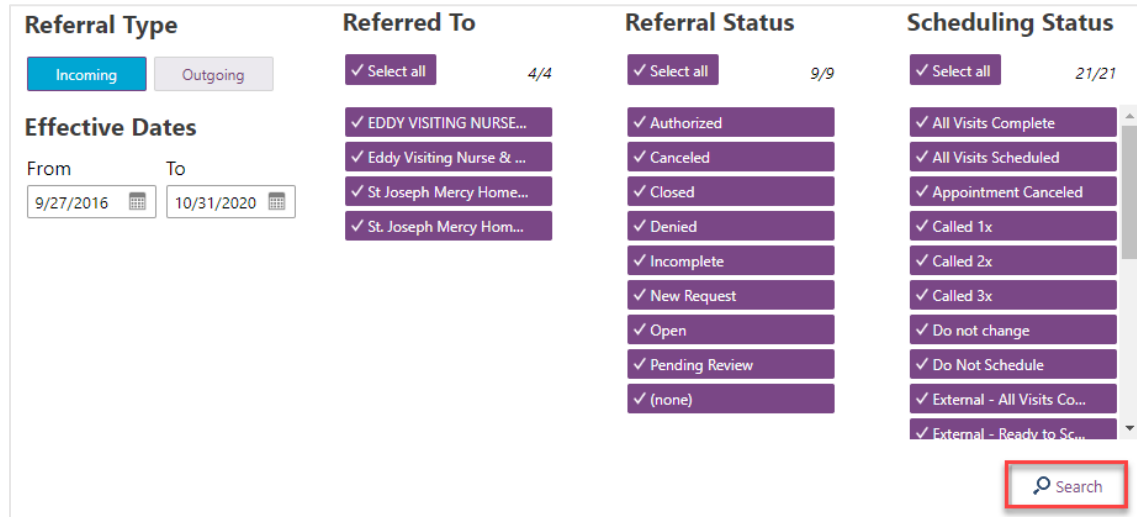
- Note: The "**To dept**" field offers a picklist of Trinity departments from which you can search keywords to filter the list and select the desired referral site.
- Select **Accept** at the bottom of the screen when your order entry is complete.
 - You will be brought back to the Order Entry screen, where you see the unsigned referral order.
 - Select **Sign Orders** to submit the referral order.
 - Or, select Pend Orders if you do not have the security to sign the order yourself.

View Incoming and Outgoing Referrals

1. Select **Referral Search** from the top activity toolbar.



2. Filter your search by selecting desired criteria.



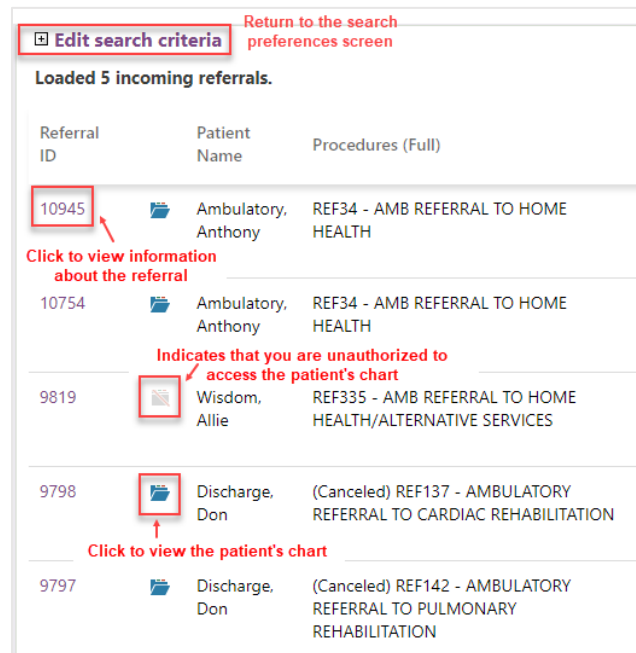
- **Referral Type:** Specify whether you'd like to see **incoming** or **outgoing** referrals orders
- **Effective Dates:** Specify a desired ordering date range.
- **Referred To:** Select one or multiple department(s) and/or provider(s) whose referrals should be included in your search results.
- **Referral Status:** Select one or multiple referral status(es) to include in your search results.
- **Scheduling Status:** Select one or multiple scheduling status(es) to include in your search results.

Navigate Referral Search Results

3. Select **Search** to show a list of referrals applicable to your specifications.

Resulted referral information includes:

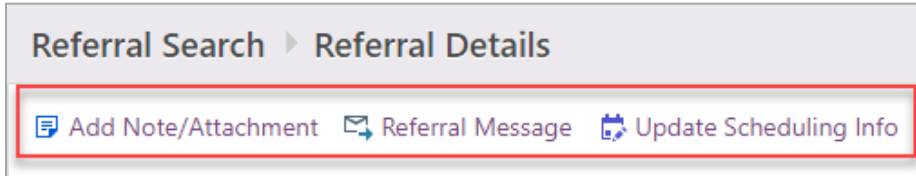
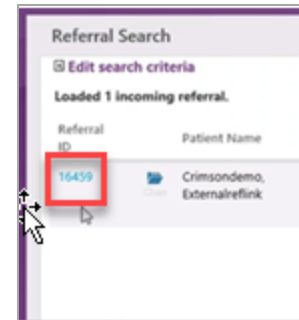
- Referral ID
- Patient Name
- Procedures
- Scheduling Status
- Status
- Priority
- Referred by Provider
- Referred to Provider
- Referred to Location
- Starts (date), Expires (date)



Address Incoming Referrals

Open the Referral Details

- From *Referral Search*, click the **Referral ID** link from the list of Referral Search results.
 - This will open the Referral Details screen for the patient referral selected.
- At the top of the screen are three options:

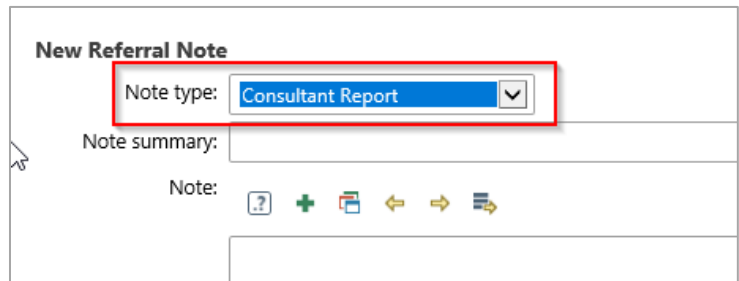


Add a Note/Attachment

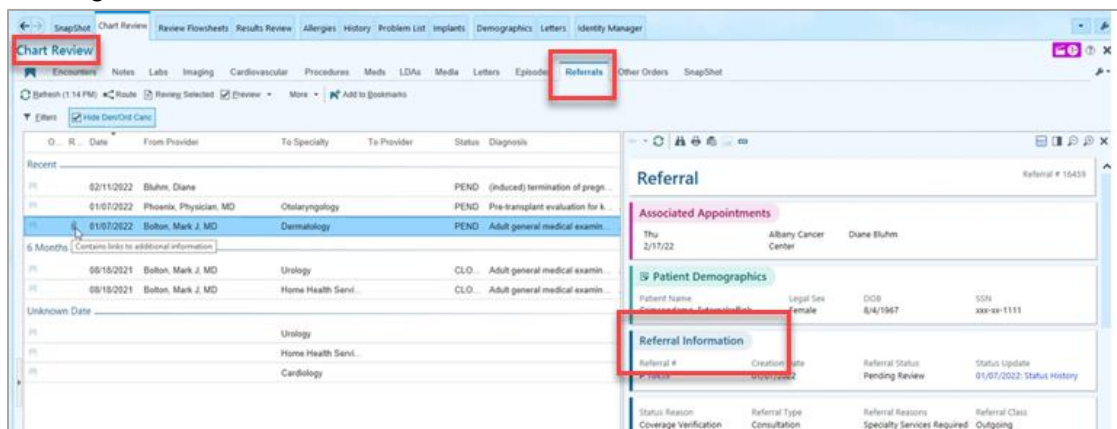
- Keep others informed about updates/activities related to the referral
- Add the Procedure or a Provider note to the referral to “close the loop”

- Click **Add Note/Attachment** at the top of the Referral Details screen.
- Select an appropriate **note type** from the picklist provided.

- **Important:** To “Close the Referral Loop”, select “Consultant Report” as the Note type. This will close the loop at the referring clinic.



- When you upload a file attachment as **Consult Report** for the referral:
 - The note will be added to Referral details, easily found in Hyperspace and EpicCare Link.
 - Navigate to Chart Review, Referral Tab. See across dates or view under Referral Information



Send a Referral Message

Referral Message is intended to be used with other Link users about the referral. Please note: It is not recommended or intended to use this function for communicating with the referring office or Provider.

1. Select **Referral Message** at the top of the Referral Details screen.
2. Enter the name(s) of the recipient(s) from the searchable "to" field.
3. Enter a subject and the body of your message.
4. Select **Send Message** at the bottom of the screen to send the message.

Update Scheduling Info

New referrals that have not yet been acknowledged will have a scheduling status of "**External – Ready to Schedule.**" To keep others informed regarding the status of a referral:

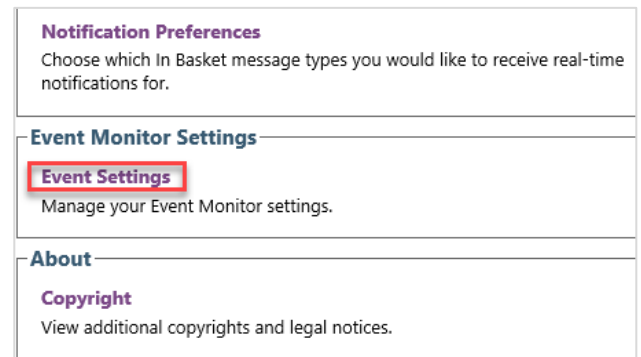
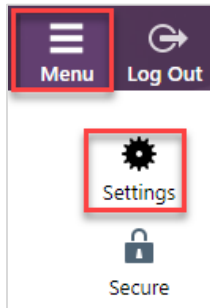
1. Select **Update Scheduling Info** at the top of the Referral Details screen.
2. Update the Scheduling Status according to the activities performed:
 - **External – Ready to Schedule:** Status of all new incoming referrals, indicating it has not yet been acknowledged.
 - **HH/PACE Intake Assignment:** Indicates referral has been acknowledged and accepted by intake.
 - **External – All Visits Completed:** The referral appointment has been scheduled.
 - **Do Not Schedule:** The referral was declined.

In Basket Referral Notifications

You may choose to receive In Basket notifications when referrals are created or updated. From these In Basket messages, you can view information about the patient and notes from the referring provider. Using the In Basket toolbar, you can also navigate to the referral (the Referral Details screen previously shown in this guide). Functionality is limited when accessing the referral from the In Basket rather than Referral Search.

Verify Referral Event Monitor Settings

1. Click **Menu** from the upper right of your screen, then **Settings** from the dropdown menu.



2. From the Settings screen, click **Event Settings**.
3. Under **Event Filter**, verify that you have the desired referral events turned on.
 - Referral Created, and Referral Authorized are turned on for all users by default.

Open a Referral from In Basket

1. Navigate to your **In Basket**.
2. Click the Referral Notifications folder.
3. Select a referral notification from the list.
4. Click **Open Referral** from the In Basket toolbar to open the Referral Details screen for the selected item.