

**Application:** EpicCare Link

**Affected Role:** Post-Acute Care Clinicians

**Revision Date:** 1/31/2024

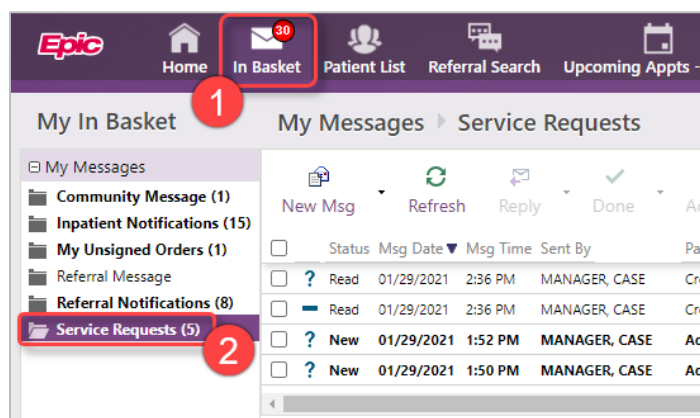
**Epic Version:** February 2023

## Introduction

EpicCare Link users will receive service requests from inpatient settings. Requests are typically sent by Case Managers, requesting post-acute placement (continuing care sites), or transportation (EMS users). Users are notified of these requests via EpicCare Link In Basket message, from which they will also need to accept or decline the request.

## Respond to a Service Request

1. Navigate to **In Basket**.
2. Select the **Service Requests** folder.




3. View the baton icons next to each message, which indicate who is working on the message:
  - ? Nobody has taken the baton (click to take)
  - + You have taken the baton (click to put back)
  - Another user has taken the baton (hover to see who or click to take)
4. Click ? to indicate you are working on the message and have therefore "taken the baton."
5. Review the request.
  - The Status request for new messages that have not yet been accepted or denied will be "pending."
  - To learn more about the request, view the attached report in the bottom panel (typically a post-acute placement report sent by the Case Manager).
  - To view the patient's chart, click "Select Patient" from the toolbar. Please note, this does not accept the patient as commonly misinterpreted.
6. Optionally, click Reply from the toolbar to reply to the sender if you have questions about the request or need additional information.
7. Click **Accept** or **Decline** from the toolbar, according to your determination.
  - The Trinity user who sent the request will see this updated request status in Epic.

## If you decline the request...

1. You will be prompted to provide a reason for declining. Select one or multiple reasons from the picklist provided.

**Decline Reason for Admission, Seth [100007131]**

Enter one or more reasons for declining the request. Declining this request will mark all messages associated with this encounter as Done.

Reasons:  

- Capacity Full
- Criminal / Sex Offender History
- Fall Risk
- History of violence and/or drug/alcohol abuse
- Other (Comment)
- Out of Network / No benefit coverage
- Out of Service Area
- Patient does not meet the level of care required
- Unable to accommodate patient's medical needs
- Unable to accommodate patient's psychosocial needs

- After declining and providing your reasons for declining, all In basket messages related to the request will be marked as "Done," and therefore removed from the Service Requests folder.
- The Epic user who sent the service request will see the updated request status and reason(s) for declining.

## If you accept the request...

2. If the service request was sent to multiple prospective facilities in addition to yours, the request status will be "Accepted" until the patient has selected an accepting facility.
3. Keep Accepted requests in your In Basket until the Request Status changes to "Selected" or "Not Selected".
  - **Selected** = the patient has chosen your facility for the request.
  - **Not Selected** = the patient did not choose your facility. You can mark this message as Done.
4. Mark the message as **Done** to remove it from your In Basket after completing any needed follow-up activities.
  - Follow-up activities for preparing for the patient/services will vary per organization's unique workflows outside of EpicCare Link.

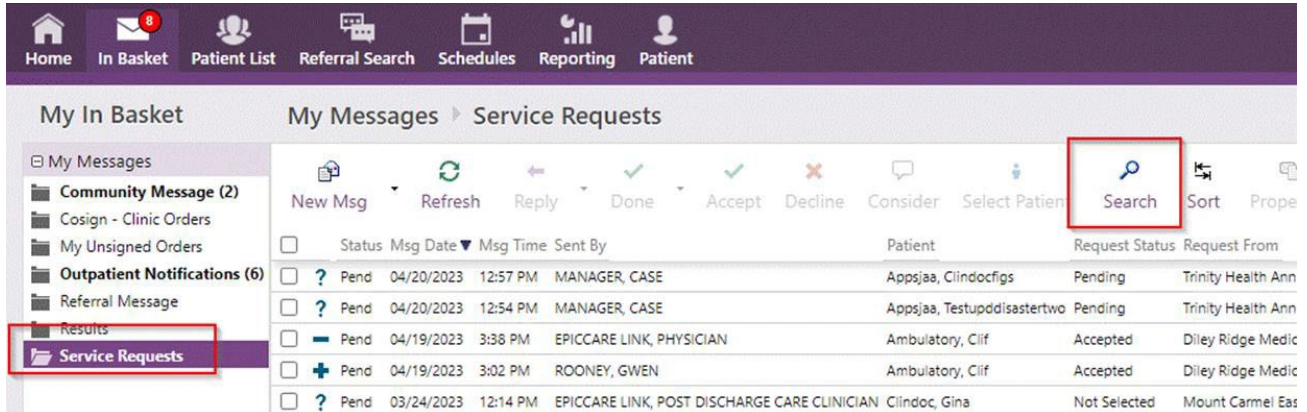
Request Status	What does it mean?	What should I do? *
<b>Pending</b>	Your facility has not yet accepted or declined the service.	<ul style="list-style-type: none"> <li>• Review the request to determine if services requested can be provided. Contact the sender if more information is needed.</li> <li>• Click Accept or Decline according to your determination.</li> </ul>
<b>Accepted</b>	Link user reviewed the request and determined requested services can be provided by facility specified.	<ul style="list-style-type: none"> <li>• Keep the request in your In Basket until the status changes to Selected or Not Selected.</li> </ul>
<b>Selected</b>	The patient has selected your facility, possibly among other facilities who also received/accepted the request.	<ul style="list-style-type: none"> <li>• Perform needed follow-up activities in preparation for the patient's arrival/services (per organization's unique workflows).</li> <li>• Mark the message as Done when all follow-up actions have been taken.</li> </ul>
<b>Not Selected</b>	Though your facility has accepted the service request, the patient has not chosen your facility.	<ul style="list-style-type: none"> <li>• Mark the message as Done to remove it from your In basket.</li> </ul>

\* Assumes you have taken the baton for the message

## Missing a Service Request?

If you are unable to find a service request in the In Basket, another person may have marked it as “done.” To retrieve the service request, you’ll need to perform a search.

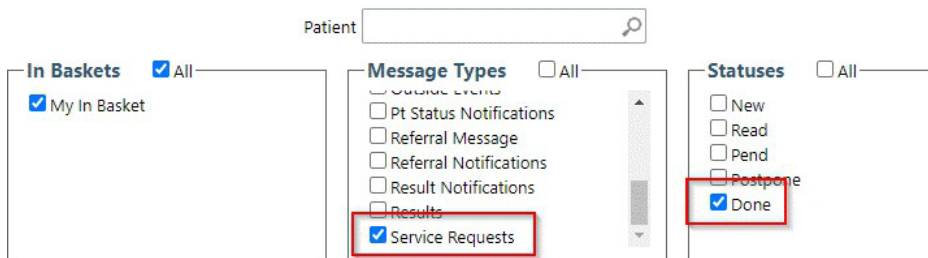
1. Go to the Service Request In Basket folder.
2. Click **Search**.



The screenshot shows the EpicCare Link interface. The top navigation bar includes Home, In Basket (with a red notification badge), Patient List, Referral Search, Schedules, Reporting, and Patient. The main content area is titled 'My In Basket' and 'My Messages > Service Requests'. On the left, a sidebar shows 'My Messages' with subfolders: Community Message (2), Cosign - Clinic Orders, My Unsigned Orders, Outpatient Notifications (6), Referral Message, Results, and Service Requests (highlighted with a red box). The main area displays a list of messages with columns: Status, Msg Date, Msg Time, Sent By, Patient, Request Status, and Request From. A 'Search' button is highlighted with a red box in the top right of the message list area.

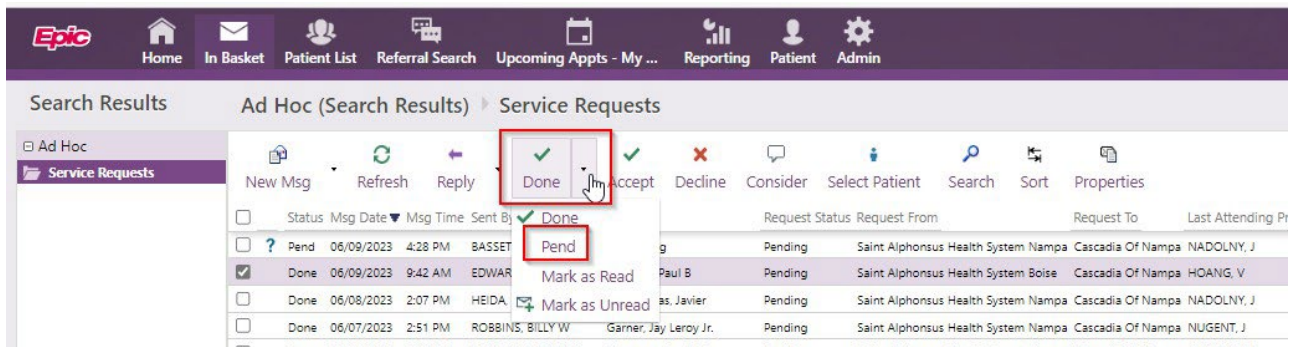
3. Filter your search to **Service Requests** and **Done**.

A 'Search Results' folder will be created and the resulting messages will be listed in the individual message type subfolders. Out Basket messages are excluded from the search.



The screenshot shows the search filters in EpicCare Link. The 'In Baskets' section has 'My In Basket' selected. The 'Message Types' section has 'Service Requests' selected. The 'Statuses' section has 'Done' selected.

4. This will return an ad hoc search result window that pulls all service requests marked as done.
5. Find and highlight the service request from the list.
6. With the service request highlighted, click the dropdown menu next to Done and change the status to **Pend**.

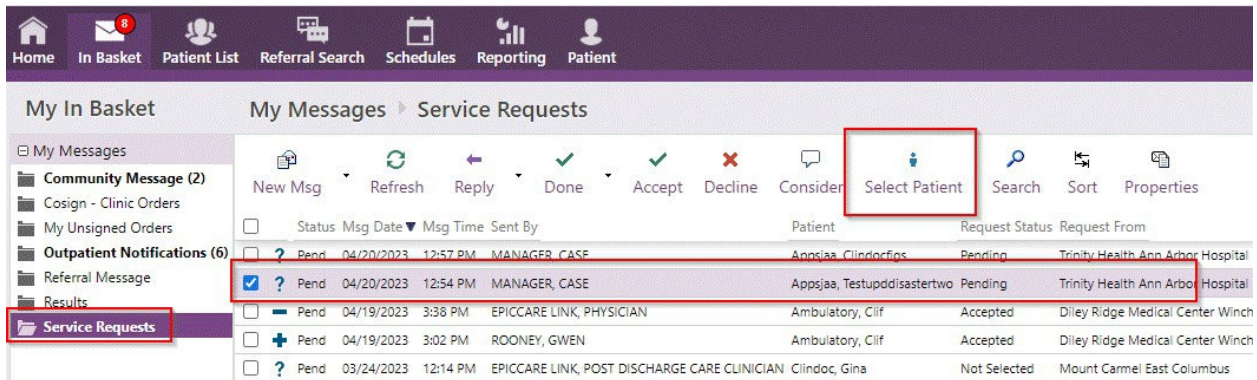


The screenshot shows the 'Search Results' window in EpicCare Link. The 'Ad Hoc (Search Results) > Service Requests' section is active. A message is highlighted, and the 'Done' status is being changed to 'Pend'.

## Unable to Open Patient Chart?

If you can see a service request in your In Basket, but are unable to open the patient's chart, the message needs to be marked as “read” again.

1. Select the service request from the list.
2. Click the **dropdown menu** next to Done.
3. Change the status to **Read**.
4. Click **Select Patient** from the toolbar to open the patient's chart.



The screenshot shows the EpicCare Link interface. The top navigation bar includes Home, In Basket (with a red notification badge), Patient List, Referral Search, Schedules, Reporting, and Patient. The left sidebar shows 'My Messages' with categories: Community Message (2), Cosign - Clinic Orders, My Unsigned Orders, Outpatient Notifications (6), Referral Message, Results, and Service Requests (highlighted with a red box). The main area displays 'My Messages > Service Requests'. The toolbar includes New Msg, Refresh, Reply, Done (with a dropdown arrow), Accept, Decline, Consider, Select Patient (highlighted with a red box), Search, Sort, and Properties. Below the toolbar is a table of service requests:

<input type="checkbox"/>	Status	Msg Date ▼	Msg Time	Sent By	Patient	Request Status	Request From
<input type="checkbox"/>	? Pend	04/20/2023	12:57 PM	MANAGER, CASE	Appsja, Clindocfigs	Pending	Trinity Health Ann Arbor Hospital
<input checked="" type="checkbox"/>	? Pend	04/20/2023	12:54 PM	MANAGER, CASE	Appsja, Testupdisastertwo	Pending	Trinity Health Ann Arbor Hospital
<input type="checkbox"/>	Pend	04/19/2023	3:38 PM	EPICARE LINK, PHYSICIAN	Ambulatory, Clif	Accepted	Diley Ridge Medical Center Winch
<input type="checkbox"/>	+ Pend	04/19/2023	3:02 PM	ROONEY, GWEN	Ambulatory, Clif	Accepted	Diley Ridge Medical Center Winch
<input type="checkbox"/>	? Pend	03/24/2023	12:14 PM	EPICARE LINK, POST DISCHARGE CARE CLINICIAN	Clindoc, Gina	Not Selected	Mount Carmel East Columbus