TogetherCare
Powered by Epic to deliver people-centered care

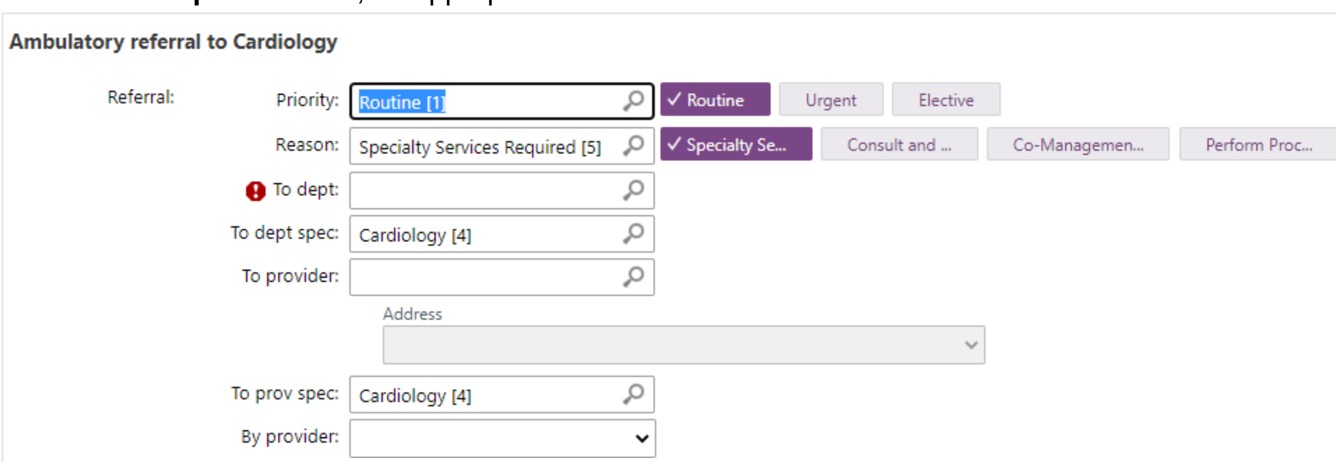
EpicCare Link – Working with Referrals

TIP SHEET

Application: EpicCare Link
Affected Role: EpicCare Link Referral Users
Revision Date: 9/13/2024
Epic Version: February 2024

Place a Referral Order

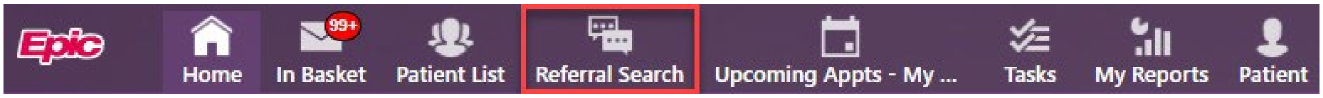
1. **Navigate to Order Entry** via one of the following methods:
    - EpicCare Link homepage > Click Place Order > Select patient from list
    - From within patient's chart, click Order Entry from the dropdown menu of more options.
2. Select an **authorizing provider** from the dropdown list and click Accept.
3. 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.
4. **Fill out the required fields**, as appropriate for the referral.



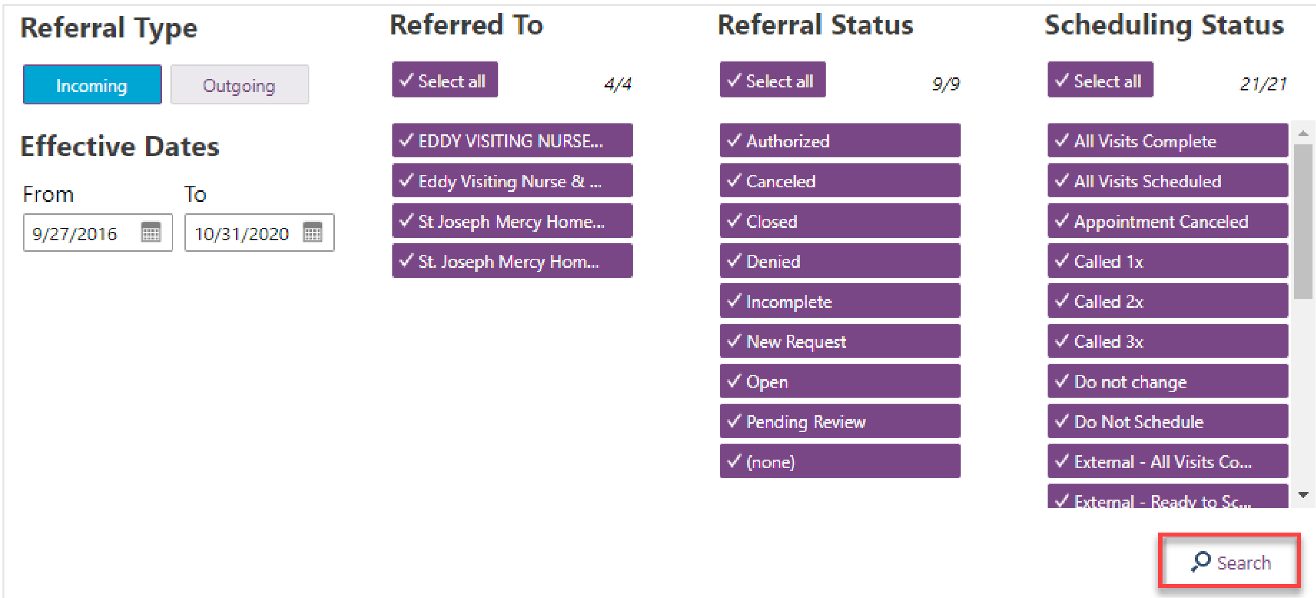
    - Note: The ***"To dept"*** field offers a picklist of Trinity departments from which you can search keywords in order to filter the list and select the desired referral site.
5. Click **Accept** at the bottom of the screen when your order entry is complete.
    - You will be brought back to the Order Entry screen, where you will see your unsigned referral order.
6. Click **Sign Orders** to submit the referral order.
    - Or, click 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.

3. Click **Search** to show a list of referrals applicable to your specifications.
    - Resulted referral information includes: Referral ID, Patient Name, Procedures, Status, Scheduling Status, Priority, Referred by Provider, Referred to Provider, Referred to Location, Starts (date), Expires (date).

Navigate Referral Search Results

⊞ Edit search criteria

Return to the search preferences screen

Loaded 5 incoming referrals.

Referral ID		Patient Name	Procedures (Full)
10945		Ambulatory, Anthony	REF34 - AMB REFERRAL TO HOME HEALTH
10754		Ambulatory, Anthony	REF34 - AMB REFERRAL TO HOME HEALTH
9819		Wisdom, Allie	REF335 - AMB REFERRAL TO HOME HEALTH/ALTERNATIVE SERVICES
9798		Discharge, Don	(Canceled) REF137 - AMBULATORY REFERRAL TO CARDIAC REHABILITATION
9797		Discharge, Don	(Canceled) REF142 - AMBULATORY REFERRAL TO PULMONARY REHABILITATION

Click to view information about the referral

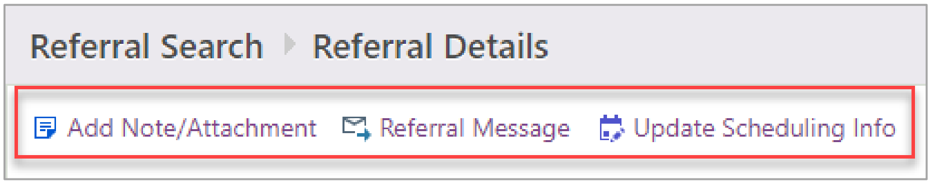
Indicates that you are unauthorized to access the patient's chart

Click to view the patient's chart

Address Incoming Referrals

Open the Referral Details

1. From *Referral Search*, click the **Referral ID** link from the list of Referral Search results.
    - This will open the Referral Details screen for the referral you selected.
2. See the options available at the top of the screen.



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 about the status of a referral and work performed the scheduling information as you take action on the referral.

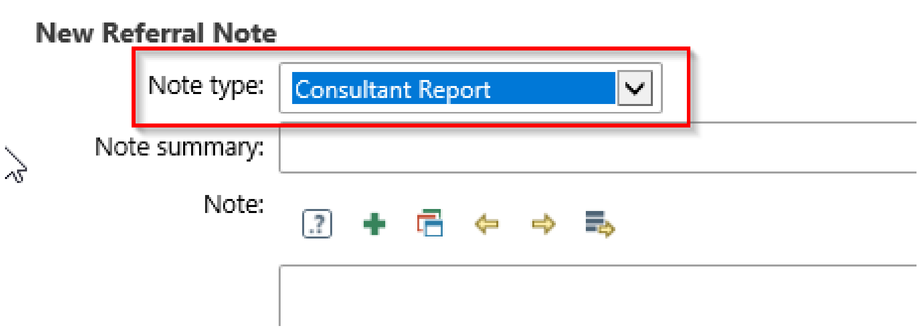
1. Click **Update Scheduling Info** at the top of the Referral Details screen.
2. Update the Scheduling Status according to the activities performed:
    - **External – Ready to Schedule**: Status of all new incoming referrals, indicating it has not yet been acknowledged.
    - **HH/PACE Intake Assignment:** 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.

Add a Note/Attachment

To keep others informed about updates/activities related to the referral, add a note to the referral.

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

➢ **To "Close the Referral Loop", select "Consultant Report" as the Note type.**



3. Enter a free-text note and/or upload a file attachment for the referral.
    - Your note will be added to the referral details, visible in both Hyperspace and EpicCare Link.

Send a Referral Message

Send a referral message to other users about the referral. Click **Referral Message** at the top of the Referral Details screen.

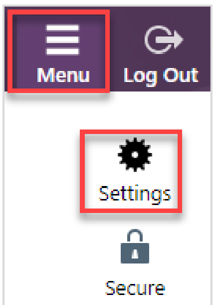
1. Enter the name(s) of the recipient(s) from the searchable "to" field.
2. Enter a subject and the body of your message.
3. Click Send Message at the bottom of the screen to send the message.

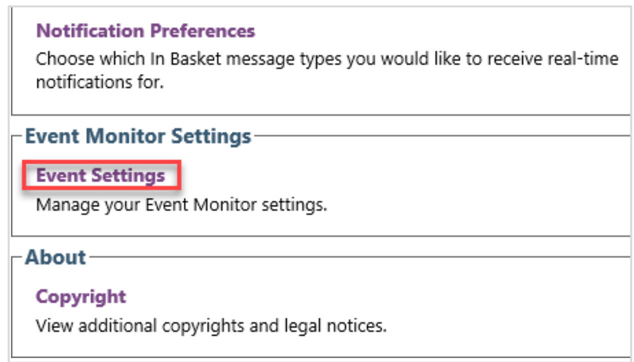
In Basket Referral Notifications

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.