TogetherCare
Powered by Epic to achieve TogetherHealth

EpicCare Link Community User Quick Start Guide

QUICKSTART

Revision Date: 2/22/2024

Table of Contents

Trinity Health

Getting Started

EpicCare Link is a tool that provides real-time web access to patient information so you can access patients' clinical data and communicate with Trinity Health TogetherCare to provide quality patient care. You can also use EpicCare Link to quickly refer patients to our organization.

EpicCare Link is a collection of different web pages, or activities, that correspond to different tasks. The activity that you use depends on what you want to accomplish. Every user will have varying levels of security, so only some, not all, activities will be available to users.

Browser, System, and Connection Requirements

Microsoft Windows

- Microsoft Edge version 106 or above
- Google Chrome version 106 or above
- Mozilla Firefox version 102 or above

Mac Operating System

- Firefox version 106 or above
- Google Chrome version 106 or above
- Apple Safari version 15 or above

Google Chrome Operating System*

- Google Chrome version 106 or above

Linux Operating System*

- Google Chrome version 106 or above

Android Tablets*

- Google Chrome version 106 or above

iOS Tablets*

- Apple Safari version 15 or above
- Tablets, Chrome OS, and Linux are not supported in Executive Dashboards.
- EpicCare Link can also be accessed by iPads running iOS 14 or later using the Safari browser and Android tablets using the Chrome browser. The native Android browser and other third-party browsers are not supported. The Chrome browser on iOS is also not supported.
- To function properly with your web application, a browser must be able to accept cookies, and it must be enabled to run JavaScript. These are enabled by default when you install the supported browsers, so they're supported unless you have explicitly disabled them.

Log In

Log in for the first time

1. Open your web browser and go to https://epic-ecl.trinity-health.org/EpicCareLink
2. Enter the user ID and password that you received for EpicCare Link
3. You will be prompted to change your password and enroll in two-factor authentication
4. Once you are logged in, a Terms and Conditions page will appear. Read and acknowledge the agreement to continue to EpicCare Link.

Password Tips

- Passwords must be at least 15 characters, including numbers, letters, and special characters
- Do not use single dictionary words, especially including Trinity, Spring, Summer, Fall, Winter, Names of Months, etc.

Set Up Two-Factor Authentication

Upon first logging in, you are prompted to choose a method for receiving a single-use passcodes that are required to access your account. This extra layer of security helps ensure that you're the only person who can log in to your account, even if someone knows your username and password.

- You can receive the passcodes through a text message or email.
- Each time you try to log in, you receive a passcode through your chosen method that you need to enter to finish logging in. Each passcode can be used only one time.
- After entering the passcode, select the Remember Me check box to bypass having to enter a passcode the next time you sign in from the same device.

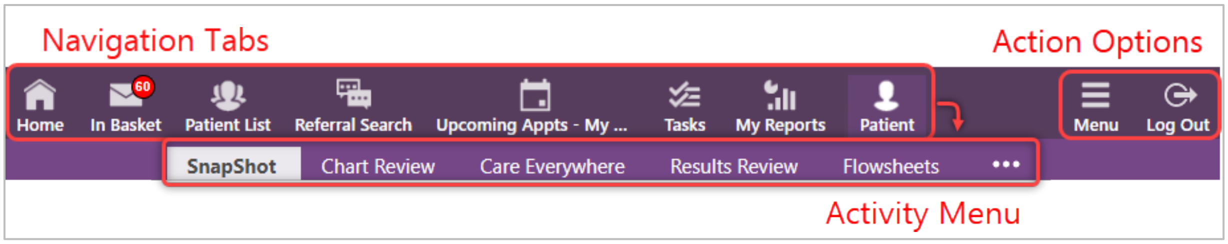
> If you are unable to reset your own password, your account may be locked. Please contact your administrator/coordinator at your facility for assistance.

Navigate EpicCare Link

Navigation Tabs

Use these tabs (located at the top of the screen) to open related activities in EpicCare Link.

- Each tab contains one or more activities.
- For example, the Schedules navigation tab contains scheduling-related activities.



Activity Menu

Use this menu to open the various activities that are contained in the selected navigation tab. For example, the **Patient** tab activity menu contains the **Allergies** and **Chart Review** activities.

- If there are more activities than can fit on the screen, hover over the ellipsis on the far right of the menu to see all the activities contained in the tab.
- You can also click to pin an activity so it appears first in the menu. If you pin multiple activities, they appear in the order that you pinned them. Click and drag pinned activities in the menu to change their order.

Action Options

Use these buttons, located in the top right of the screen, to see all of your available activities or to log out.

Log Out

To maintain patient confidentiality, you need to log out or secure your screen when you are done working or have to leave the computer for any reason. There are two ways to do this:

1. Click Log Out. The next time you log in, you'll be directed to your homepage.
2. To save your place, rather than logging out you can secure your workstation (Menu >Secure).

User Job Roles & Types of Access

EpicCare Link access is granted according to job role. Please note that this guide may include functions to which you are unable to access. As such, it is important to note the functions available to your role, listed here:

Job Role Area	Who Are They?	Types of Access
Physicians	Physicians, Nurse Practitioners, Physician Assistants.	Chart Review, Event Monitor, In Basket, Managed Access, Patient List, First Access Patients Chart, Orders (Referrals, Lab, Radiology), View Assessments, Update Demographics, View Patient Billing Info, Quick Appointments, Upcoming Appointments, Document Upload, Care Management Tasks, Close Care Gaps
Clinical Staff	RN, LPN, Medical Assistant, etc.	Chart Review, Event Monitor, In Basket, Managed Access, Patient List, First Access Patients Chart, Orders (Referrals, Lab, Radiology), View Assessments, Update Demographics, View Patient Billing Info, Quick Appointments, Upcoming Appointments, Document Upload, Care Management Tasks, Close Care Gaps
Non-Clinician	Front Desk Staff, Schedulers, Referral Staff, etc.	Chart Review, Event Monitor, In Basket, Managed Access, Patient List, First Access Patients Chart, Orders (Referrals, Lab, Radiology), Update Demographics, Quick Appointments, Upcoming Appointments, Document Upload
Biller	Biller/Coder	Chart Review, Event Monitor, In Basket, Managed Access, Patient List, First Access Patients Chart
Post Discharge Care Clinician	Skilled Nursing Facility, Home Health, Hospice, Acute Rehab, DME, etc.	Chart Review, Event Monitor, In Basket, Managed Access, Patient List, First Access Patients Chart, Orders (Referrals, Lab, Radiology), View Assessments, View Patient Billing Info, Upcoming Appointments, Document Upload, Care Management Tasks, Close Care Gaps, View Grease Board, Update Coverage & Benefits, Discharge Placement.
Research Monitor	Research Study Monitor	View Only

Patient List

Search for a patient's record based on name and MRN

1. Click the **Patient** navigation tab and enter the patient's name or MRN.
2. In the Search Results window, click the name of the patient whose chart you want to open.

> To open a recently accessed chart: Go to Search My Patients > Recent tab.

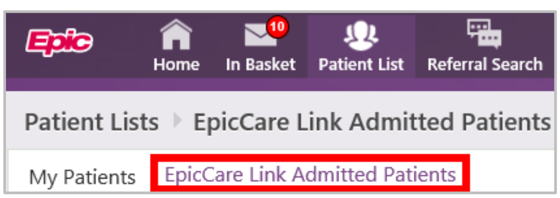
Select a patient's chart from a list of current patients

1. Click **Patient** and go to the **My Patients** tab.
    - If you have access to many patients, your patients might appear on more than one page. Use the field at the top of the page to search for patients by their name.
2. Click a **patient's name** to open their chart.

> To see only the patients for whom you are the PCP, select your name in the Filter by provider field.

View currently admitted patients

1. Click the **Patient List** navigation tab.
2. Select the **EpicCare Link Admitted Patients** tab.



    - For patients to appear on this list, you must have a provider relationship of PCP, attending, admitting, or treatment team on the admission.
3. Select a patient's name to view additional patient-specific information in the report pane.
4. If you view a report frequently, click the **wrench icon** to add a button for the report to the toolbar. From that page, you can also remove your report toolbar buttons, rearrange the order of buttons, and rename the reports.
5. Click the **folder icon** to open a patient's chart.

What if I can't find a patient?

If you don't find a patient using the methods above, you might not have been granted access to their chart yet, or they might not have a record in the system. Use the Search All Patients section of the Patient Search activity when you need to gain immediate access to a patient's chart for the first time, such as in the case of an emergency. Note that you must enter the patient's first and last name, date of birth, and sex when using this method.

1. If your initial search returns no results, click **Search All Patients** from the Search Results window.
2. Complete all of the required fields, and then click **Search.**
3. Select the patient record you want to open and select the reason you need access to the patient's chart in the Reason field.
4. Enter any additional comments and click **Accept.**

Can I delete a patient from my Patient List?

If a patient needs to be removed from your Patient List, you will need to have your Site Administrator delete it, as they have the security to do so. The following steps are for Site Administrators only.

1. Navigate to the **Patient Activity.**
2. Select **Search My Patients**.
3. Hoover over the patient you need to remove, and the "X" will appear at the far right.
4. Click the "X".

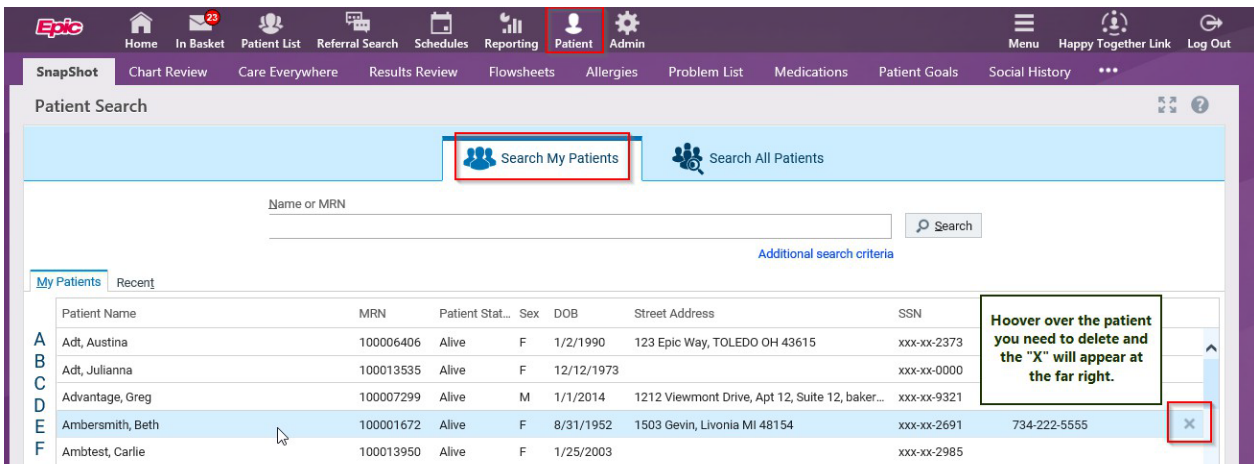
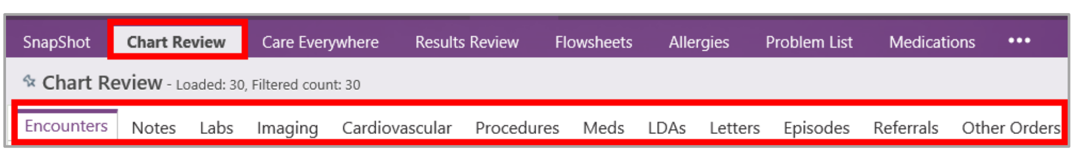


Chart Review

Review the patient's chart before a visit

1. Open the patient's chart via the Patient List activity, then click **Chart Review**
2. Select a tab from the Chart Review activity menu that includes information you want to review.



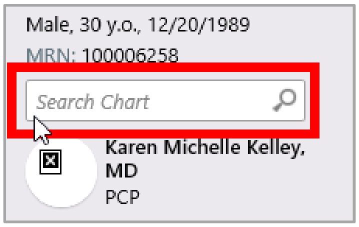
3. To view more detail, such as a specific patient visit, click the **date link** that appears in the row.

4. To send a message to the patient's PCP regarding an office visit, click Ask a Question, fill out the message form, and click ✔ Send Message.

Find information quickly in the patient's chart

For patients with large charts, you can enter text in the Search Chart field to quickly find the information you need.

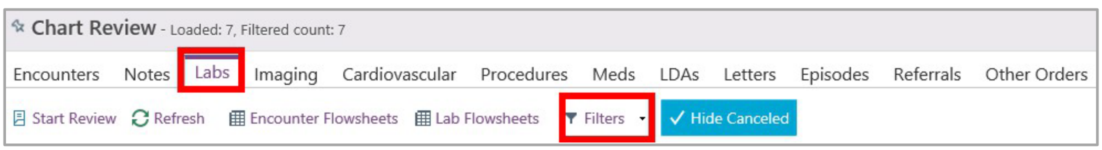
- For example, search for "cholesterol" to see a list of relevant matches in the patient's chart, such as lipid panel results and progress notes that mention cholesterol.



Use filters to narrow the list of information you see

You can also use filters to find visits, labs, medications, or other information in Chart Review. For example, on the **Encounters** tab, you can filter the list so you see only the visits associated with certain providers.

1. In **Chart Review**, select a tab from the activity menu.
2. Click **Filters** and select a filter type.



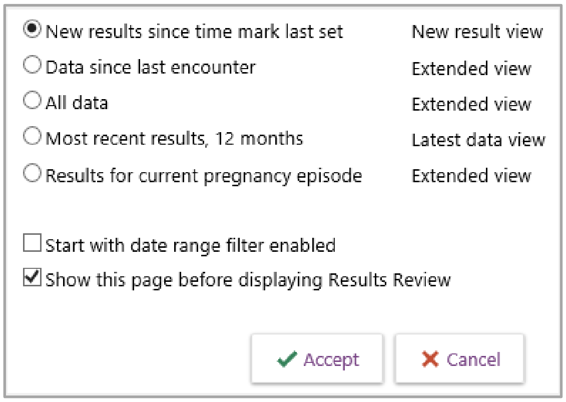
3. Select check boxes next to the values that you want to see.
   - For example, select Encounter Type, and then select the Billing Encounter filter.
4. Click **Apply** to make the results of your search appear.

View trending data in graph or table format in Chart Review

1. In Chart Review, select the check box for the data you want to view.
   - For example, select specific visits or lab tests.
2. Select the type of flowsheet that you want to create.
3. Click **Encounter Flowsheets** to graph data such as vital signs or medications. Then select a specific flowsheet, such as Diabetes - Brief.
4. Click **Lab Flowsheets** to graph lab result data.
5. Click and drag to select the table cells that contain data that you want to graph.
6. Click **Line Graph** or **Bar Graph** to create a graph of the selected data.

View a patient's trending lab results in Results Review

1. Select the **Patient** tab and click **Results Review**.
2. Select the date range for the results data you want to see and click **Accept**.



3. To view a specific result component type, such as Hematology, or a specific result component, such as Hemoglobin, expand the tree on the left.
4. Select the name of the component or component type that you want to view.
5. To view more columns of results, click **Load More**. To view all columns of a patient's results for the time range that you selected, click **Load All**.

> Click Time Mark so the next time you view the patient's results, you can easily distinguish any new results from those that you have already seen.

Customize your Results Review display

1. In Results Review, click **Options**.
2. To make the most recent results appear from left to right by default, select the **Trend Dates in reverse chronological order** check box.
3. Set your other default preferences.
4. Click **Accept**.

View a patient's allergies

1. Select the **Patient** navigation tab and click **Allergies** from the activity menu.

View a list of the patient's current medical problems

1. Select the **Patient** navigation tab and click **Problem List** from the activity menu.

View a patient's history

1. Select the **Patient** navigation tab and click **Histories.**
   - This will open a report with information about the patient's medical, surgical, family, and social history. Social history includes topics like tobacco use and sexual activity.

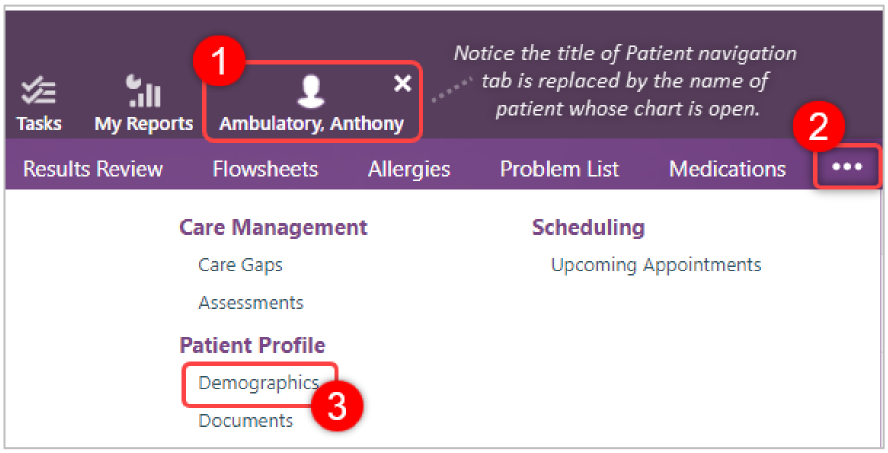
View a patient's current medications

1. Select the **Patient** navigation tab and click **Medications** from the activity menu.

View a patient's demographics

You can see a report with demographic information like the patient's address, PCP, emergency contacts, and more.

1. Select the **Patient** navigation tab.
2. Click the **ellipses** from the activity menu to show a dropdown menu of additional activities.
3. Click Demographics.



View a patient's billing information

To view information about the patient's eligibility for health plans, coverages, service areas, networks, and more, select the **Patient** tab and click **Billing Info.** You can expand and collapse the sections in the Services section and use the Jump to search bar to find specific services.

You can also see details about a particular coverage on the Benefits Summary page to:

- Determine whether a particular service is covered in or out of network.
- Determine whether a coverage is active.
- Determine whether benefits for a particular service are metered and what the limits are for each level of benefits.
- Determine what the patient portion will be for a particular service.
- Review a complete summary of benefits.

View a Delivery Summary

1. Open the patient's chart, click the **Select encounter** button from the StoryBoard.
2. Select **Hospital Chart**.
3. Select the correct **Date of Service.** The encounter will open to the SnapShot Activity
4. Select **Delivery**.
5. You can now view the **Link to Baby** section, which provides Baby's MRN, DOB, and more.

View information for a specific hospital encounter

1. Find and select the patient from the **Patient List** to open the patients chart.
    - Notice the Storyboard displays on the left side of the screen.
2. Click **Select Encounter** from the bottom of the Storyboard.
3. Select the **Hospital Chart** tab.
    - Note: Additional information will display on the Storyboard at the encounter-specific level. (APM Patient Alert, ACO, etc.)
4. Select the encounter for the date of service, as desired.
5. Click **Change Encounter** to change the encounter, as needed.

Upload Files to the Patient Chart

1. **Drag and drop a file** from your computer into the section below the patient's photo on the left side of the screen.
    - Alternatively, click **Upload document** on the left side of the screen to open a window where you can drag and drop the file.
2. If you don't want to drag and drop a file from your computer, click **Add file** to browse for the file on your computer and select it.
    - Any files that you add must be smaller than the maximum allowed file size and be of an appropriate type.
    - The maximum allowed file size appears in a message below the **Add file** button.
    - To see which types of files you can add, hover over the **i** information icon.
3. Select a **document type** for the file, such as a study attachment.
4. Enter a **description** of the file.
5. Click **Attach to patient's chart**.

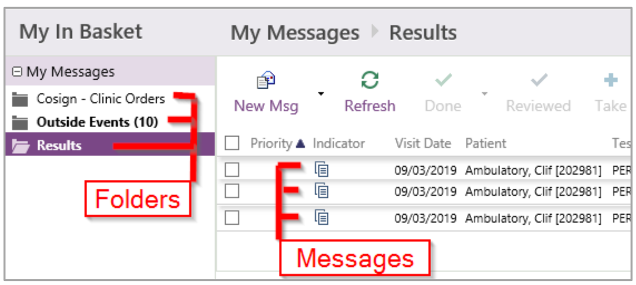
> Uploaded files can be found in the Media tab in the Patient's chart. Go to the Patient > Chart Review > Media.

In Basket Messaging

In Basket is a quick and easy way to communicate with other clinicians in order to more seamlessly coordinate patient care, stay informed about your patients' medical events, and address service requests sent to your organization in real time.

Incoming Messages

1. Select the **In Basket** navigation tab.
2. Select the **folder** for the type of message you want (for example, Result Notifications).
    - If you have new messages, the folder title appears in bold, and the number of new messages appears in parentheses next to the folder name.
    - If you have a new high-priority message, the folder appears with a red arrow.
3. Select a message to read its contents.

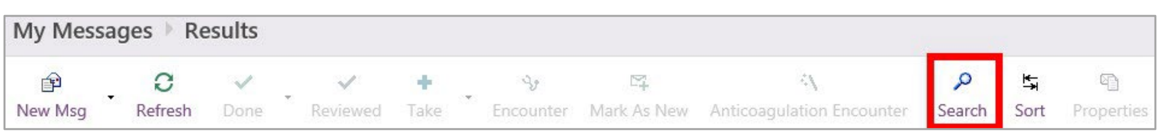


Indicate you are working on a pool message

1. When an In Basket message is sent to a pool that you're a part of, click the icon to take the baton for the message.
    - The icon becomes a icon, which indicates to other members of the pool that you're working on the message.
2. If you need to stop working on a message before you're able to complete it, click the icon again to pass the baton back to the pool. The message then appears with the icon.
3. If another member of your pool is working on a message, it appears with a icon.

Search for a message

1. Click **Search**.



2. Enter as many search criteria as you want and click **Search**.
    - You can search by patient, message type, status, recipient, priority, date, or any combination of these.
3. To return to your normal In Basket view, click **My In Basket**.

Outgoing Messages

Similar to email, you can send In Basket messages to individual recipients or to multiple recipients grouped in what is called a **pool.** You can also associate a patient with your message using the Patient field on the message form.

Send an In Basket message

1. Select the In Basket tab, click the arrow next to New Msg, and select the type of message you want to send.
2. In the To field, completion match on the name of the person or group to whom you would like to send your message. To see a list of all possible recipients, click 🔍.
3. Enter a brief subject in the Subject or Summary field.
4. If you are sending a message regarding a patient, either click Use <patient name> to pull in the patient's name, or search for a different patient. This attaches the patient's name to the message.
5. Complete any other required fields.
6. Enter your message in the Note field.
7. When you are finished, click Send Message.

Reply to or forward a message

1. With the message selected, click Reply or Forward from the In Basket toolbar.

View your sent messages

1. Select the In Basket tab and click My Out Basket.
2. Select a message type and then select a particular message to view it.
3. To return to your In Basket, click My In Basket.

In Basket Attachments and OOC Coverage

You can specify covering users and/or pools to monitor your In Basket during out of office events.

Grant another user access to your In Basket

1. From your In Basket, click **Attach.**
2. Under the **Grant Access** tab, type the names of the individuals you'd like to grant access to.
3. Once finished, Click **Save.**

Attach another user's In Basket to your In Basket

After a colleague grants you access to their In Basket, you must attach it to your In Basket to view their messages.

1. From your In Basket, click **Attach .**
2. In the **Attach Other > In Baskets** window, on the Attach tab, enter the name of the person whose In Basket you want to access, and then select one of the following:

- **Persistant Attachments**: This person’s In Basket remains attached until you remove the person’s name or they removes your access. For example, use this if you always review a physician’s normal results messages.
- **Out of Contact and Temporary Attachments**: This perosn’s In Basket will only be attached for a specified time period. For example, enter a colleague’s name here when she is busy and needs you to cover urgent issues.

3. Click **Accept.**
    - The other person’s In Basket is now attached to yours.
4. To open an In Basket, select the **Attached In Basket** tab in the lower-left corner of your In Basket.

Open a patient's chart from an In Basket Message

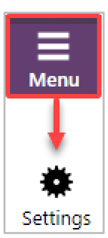
1. Select the In Basket message for the patient's event
2. Click **Select Patient** from the In Basket toolbar to open the patient's chart.

Event Monitor

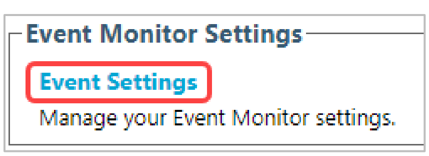
Event monitor settings in EpicCare Link allow you to monitor your patients' medical events, such as inpatient admissions or discharges, outpatient visits, or new lab results. Using event and relationship filters, you can tailor which types of events you're notified of and for which patients. You'll receive these notifications via In Basket message in EpicCare Link.

Target your event notifications

1. Open the **Menu** and select **Settings**.



2. From the Settings page, click **Event Settings.**

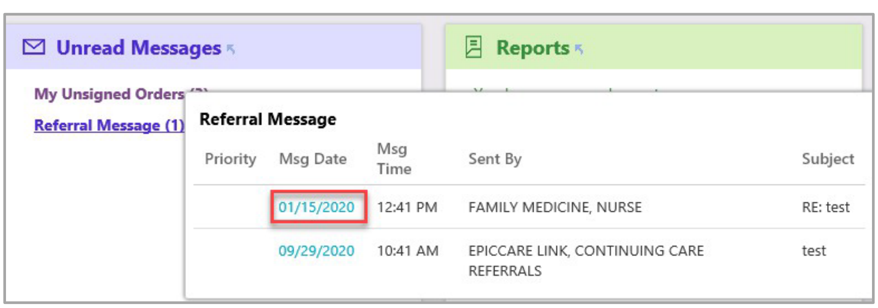


3. Choose which types of events you'll receive notifications for in the **Event Filter** section.
    - ED Discharge, Admission, and Discharge, Referral Created, and Referral Authorized are selected (turned on) for all users by default.

4. Choose which events you'll receive notifications for by selecting one of the options in the **Relationship Filtering** section:
    - **All events for patients in my group**. Receive event notifications for all patients in your group, regardless of whether they have a defined relationship with any of your group's providers.
    - **Only events associated with my group**. Receive event notifications for patients who are associated with your department, vendor, referral location/POS, or one of your group's providers. This is the recommended option for ***non-providers***.
    - **Only events associated with me***.* This is the recommended option for ***providers***.
    - Select **Only associations that I select** to be notified only of events for patients associated with the providers, departments, vendors, or referral location/POS you specify.
5. Choose who your notifications are sent to in the In Basket Settings section:
    - **Any user in my group.** Your notifications are sent to a group of users at your organization, and any of the users can access the message and mark it as Done, which removes it from the In Baskets of all the users in the group. This option helps reduce the risk of duplicate follow-up and can save time.
    - **Only me.** You are the only user who can mark the notifications as Done. Other users might still see and act on the same notifications, but they can't mark the message as Done for you. This option helps ensure that you see every notification.

View unread event notifications

1. Click the **Home** navigation tab.
2. Find the Unread Messages box.
3. **Hover** your mouse over the links (each representing a categorized folder of your In Basket) shown in the Unread Messages box to show a preview of messages in that In Basket Folder.
4. The number of unread messages for that notification type will display in parentheses, however, all messages currently in the folder will display upon hovering.
5. Click the **Msg Date link** from the notification preview to navigate to the message in your In Basket, or click the folder link to navigate to that In Basket folder.



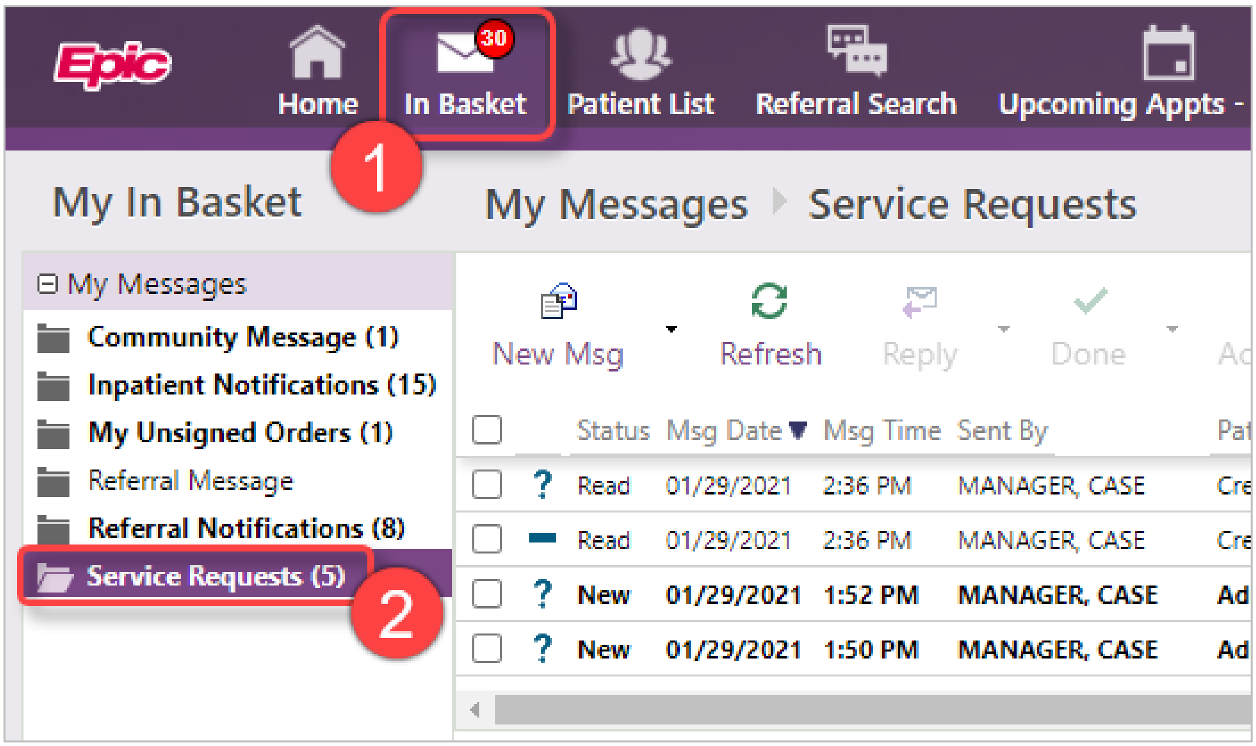
In Basket messages are automatically deleted from your In Basket after 14 days, regardless of read/unread status.

Post-Acute Placement Service Requests

Post-discharge care employees may receive service requests from Case Managers at Trinity Health inpatient settings, requesting post-acute placement or transportation to ensure discharged patients experience a seamless transition of care to post-discharge care facilities. 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.

What happens if you accept a Service Request?

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.

8. 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. Mark this message as Done.
9. Mark the message as **Done** to remove it from your In Basket after completing any needed follow-up activities.

What happens if you decline a Service Request?

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

Service Request Status Meanings

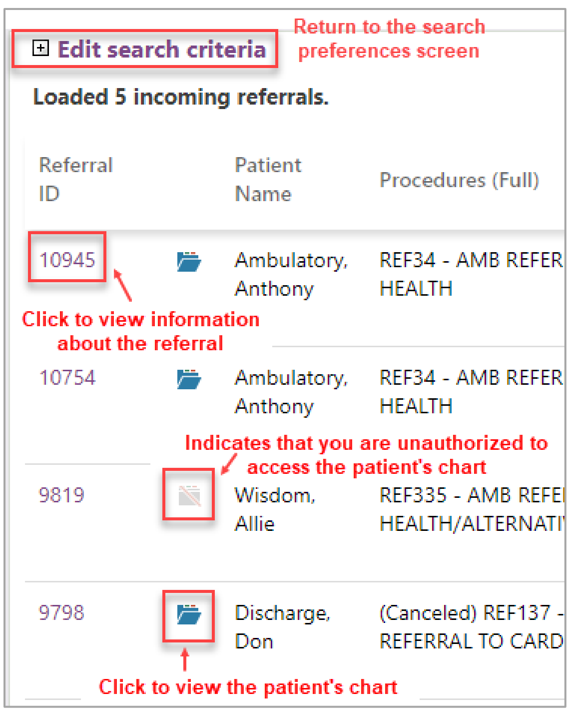
Request Status	What does it mean?	What should I do?
Pending	Your facility has not yet accepted or declined the service.	• Review the request to determine if services requested can be provided. Contact the sender if more information is needed. • Click Accept or Decline according to your determination.
Accepted	Link user reviewed the request and determined requested services can be provided by facility specified.	• Keep the request in your In Basket until the status changes to Selected or Not Selected.
Selected	The patient has selected your facility, possibly among other facilities who also received/accepted the request.	• Perform needed follow-up activities in preparation for the patient's arrival/services (per organization's unique workflows). • Mark the message as Done when all follow-up actions have been taken.
Not Selected	Though your facility has accepted the service request, the patient has not chosen your facility.	• Mark the message as Done to remove it from your In basket.

Outpatient Referrals

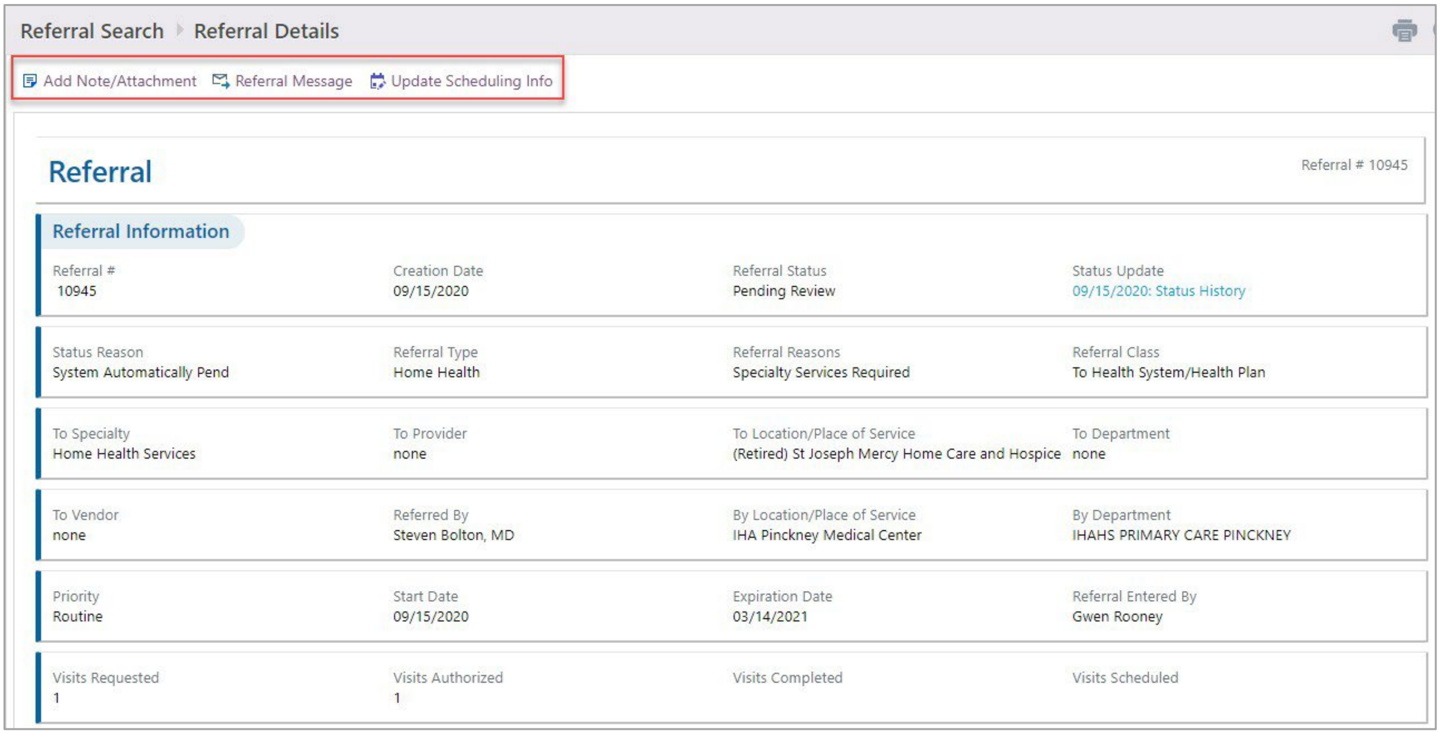
Referral Search

The Referral Search activity allows you to view a list of incoming or outgoing referrals sent to/from your facilities and providers.

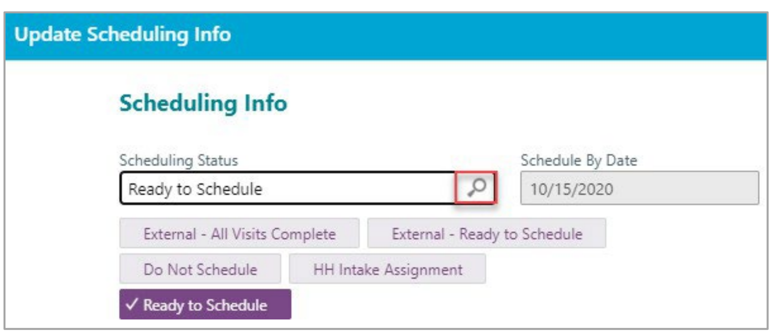
1. Select **Referral Search** from the navigation toolbar.
2. Specify your desired search criteria:
    - **Referral Type:** Select whether you want to view Incoming or **outgoing** referral orders.
    - **Effective Dates:** Specify a desired date range
    - **Referred To:** Select one or multiple department(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.



Triage Incoming Referrals



1. Click the **Referral ID** link from Referral Search to view information about the referral
2. **Add Note/Attachment:** Enter a free-text note and/or upload a file attachment for the referral. Notes/attachments will be added to the referral on the Referral Details screen.
   - Notes are visible by the referring Trinity site in Epic.
3. **Referral Message:** Send an In Basket message to another user/provider about the patient's referral.
   - The recipient must have a Trinity Hyperspace/Link account.
4. **Update Scheduling Info:** Update the referral's scheduling status when action has been taken on the referral.



   - The referring site will be able to see this updated scheduling status on the referral in Epic, but it is still advised that you notify the referring provider via referral message.
   - While many statuses may be available in the picklist, you should utilize statuses listed in the *Referral scheduling statuses* table below.

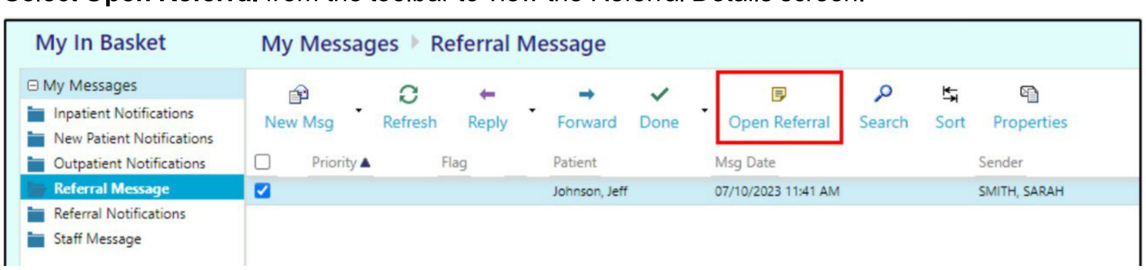
Referral Scheduling Status Meanings

Scheduling Status	What does it mean?	What do I do?
External – Ready to Schedule	New incoming referrals have this scheduling status, which indicates the referral has yet to be reviewed by referral site.	• Update the scheduling status to HH Intake Assignment to indicate that the referral has been acknowledged and is under review.
HH Intake Assignment	The referral has been acknowledged and is being reviewed by home health intake users.	• Intake users: Review the referral, message/call the office as needed to gather additional information to determine whether the referral appointment can be scheduled. • Update the scheduling status to "External – All Visits Complete" once the appointment has been scheduled. • If not scheduling the referral appointment, update the scheduling status to "Do Not Schedule."
External – All Visits Complete.	The referral appointment has been scheduled, not necessarily conducted.	• These referrals should be filtered out if you set your scheduling status filter effectively. • Refresh your search if you did filter them out and you still see them. • If you do not want to filter, sort by scheduling status to group them.
Do Not Schedule	You will not be scheduling this appointment.	• Filter these referrals out. Select this status if you will not be scheduling for some reason.

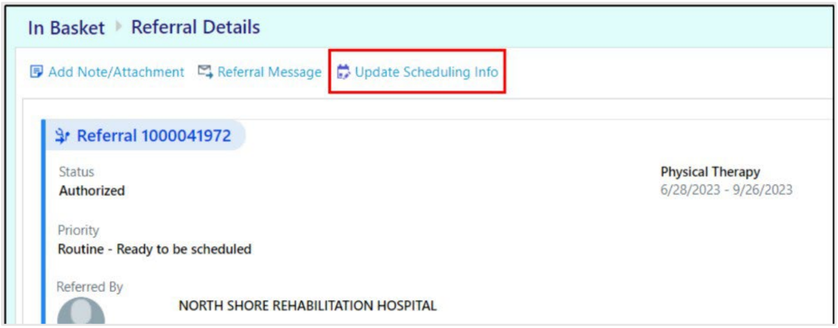
Document External Appointments and Scheduling Status from In Basket

To promote efficiency working with patient referrals, users can update the scheduling status or document external appointments for referrals from the In Basket.

1. Go to **In Basket > Referral Message.**
   - Notice the Storyboard displays on the left side of the screen.
2. Select a referral that is ready to be scheduled.
3. Select **Open Referral** from the toolbar to view the Referral Details screen.

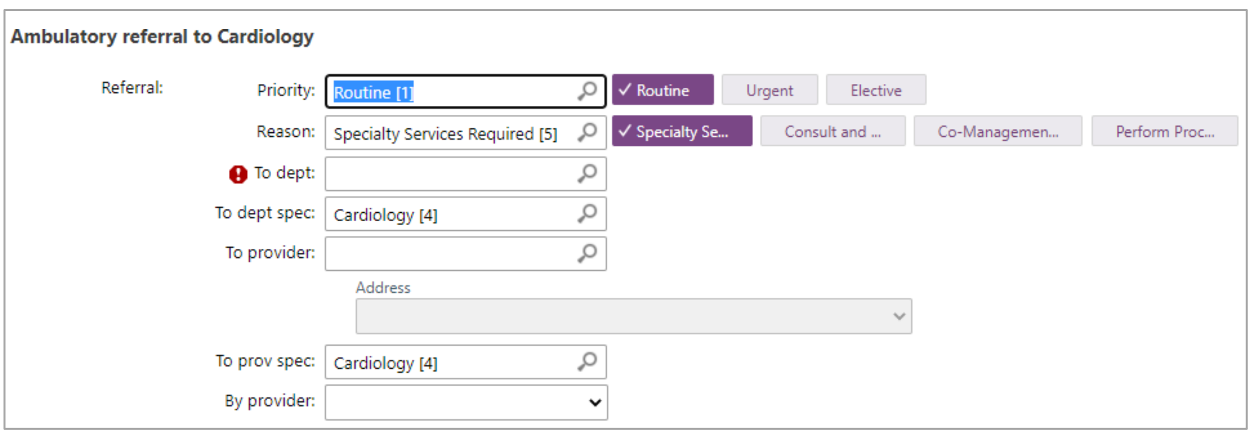


4. Select **Update Scheduling Info** from the toolbar to change the referral scheduling status or document an appointment.



Order a Referral

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,** plus others 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.

Appointments

Create real-time appointments separate from an order using the **Quick Appointment** activity. After you create an appointment, it is reserved in the system for that patient, provider, date, and time.

When you schedule an appointment, you may see a series of questions. After you answer the questions and confirm the appointment, a printable report will appear, which can be given to the patient to take home. When you search for an appointment, pre-configured search criteria are available for you to use. These appointment searches have been configured by Trinity Health TogetherCare.

Schedule a Quick Appointment

1. Select the patient from the **Patient List.**
2. Navigate to the Quick Appointment activity via: **Menu > Patient > Quick Appointment**
3. In the Appointments column, click **Office Visit with PCP.**
4. Find a provider, date, and time combination for the appointment on the list of choices that appears.
    - If you do not see an ideal option, click View More Times to see additional open time slots.
5. Below the provider's name, click the **time of the appointment** that you want to schedule.
6. If a **questionnaire** appears, answer the questions and click **Accept.**
7. In the **Referring Provider** field, choose a referring provider from the available list.
8. Click **Accept.**

i	You can print the appointment details for the patient by clicking the printer icon.

Care Planning and Coordination

Review prior visits

1. Open a patient's chart and click **Chart Review**.
2. Select the Encounters tab to view prior visits.

i	When a patient has a visit from outside of Trinity Health TogetherCare, appears in the activity toolbar. Hover over this icon to view a list of all the external organizations that the patient has data from and see when this information was last updated.

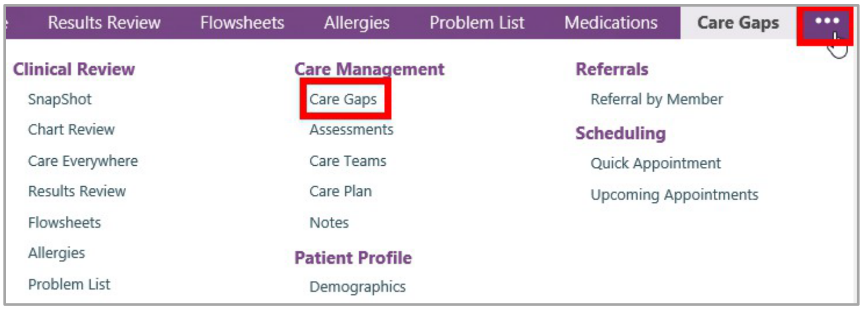
Download a visit summary

- If Trinity Health TogetherCare has consent on file to download a document from a visit with another organization, click **Request visit summary** to download and view the document.

Review a patient's care gaps

The Care Gaps activity shows you a list of the patient's care gaps from Trinity Health TogetherCare. You can see the status of each care gap, as well as when the care gap is due and when it was last completed.

1. To view a patient's care gaps, select **Care Gaps** from the patient's chart.



Resolve a care gap

When you complete a care gap, you can indicate that it's been resolved. For example, you can resolve a Cholesterol Screening care gap if you received lipid results from an outside source. For some care gaps, you can attach files of supporting documentation to show that patients received the necessary care.

1. Click the name of the care gap.

   - Alternatively, click Resolve in the row corresponding to the care gap.

2. Enter the date on which the care gap was resolved.
3. If the Documentation section appears, drag and drop a file from your computer to attach supporting documentation.
   - If you don't want to drag and drop a file from your computer, click Add file to browse for the file on your computer and select it.
   - Any files that you add must be smaller than the maximum allowed file size and be of an appropriate type.
     - The maximum allowed file seize appears in a message below the Add file button.
     - To see which types of files you can add, hover over ⓘ.
4. Optionally, enter a comment and click Resolve.

Postpone a care gap

You can postpone a care gap to change its due date. For example, you might postpone a flu shot if the patient is currently ill.

1. Click **Postpone** in the row corresponding to the care gap.
2. Alternatively, click the care gap name and go to the Postpone tab.

3. Enter the date you want to postpone the care gap until.
4. Select a reason for postponing the care gap.
5. Optionally enter a comment and click **Postpone**.

Discontinue or resume a care gap

When a care gap is discontinued for a patient, it's prevented from ever coming due but remains in the list of the patient's care caps for clinical reference. For example, a child's parents might ask that their child not be vaccinated, so you can then discontinue the vaccination care gap. If the child elects to receive the vaccine after he turns 18, you could then resume the care gap.

1. Click **Discontinue or Resume** in the row corresponding to the care gap.
    - Alternatively, click the care gap name and go to the **Discontinue** tab or the **Resume** tab.
    - If you're discontinuing a care gap, you might be required to select a reason for doing so depending on the settings of the web application.
2. Optionally, enter a comment and click **Discontinue** or **Resume**.

Manage the history of a care gap

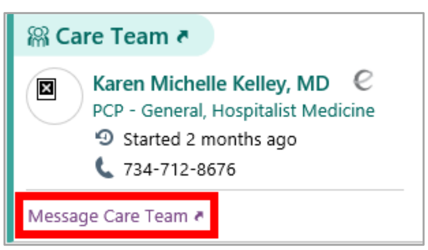
You can see each time a care gap was satisfied for a patient. You can also remove any occurrences that you don't think should be satisfied.

1. Click **Manage History** in the row corresponding to the care cap.
2. To remove an occurrence that shouldn't be satisfied, click **Remove**.

Send messages to the patient's Care Team

1. With the patient's chart open, go to SnapShot and click **Plan of Care** from the report toolbar.

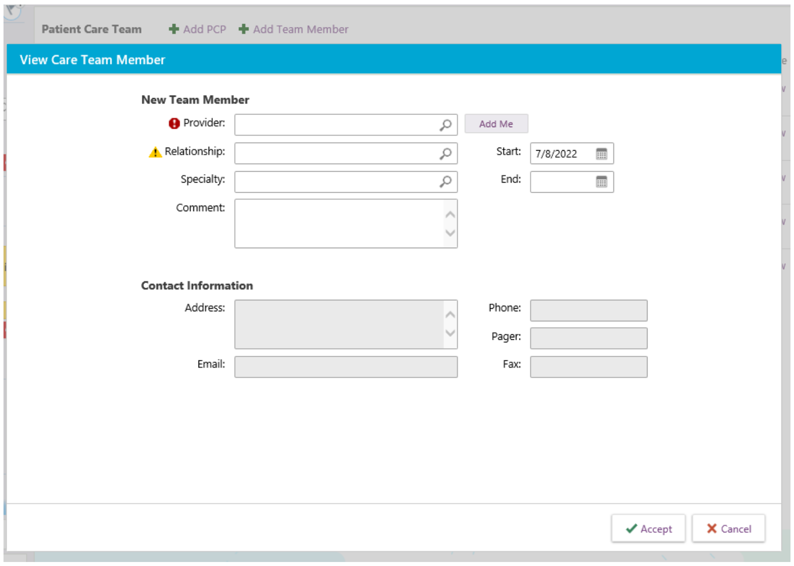
2. Go to the **Care Team** section and click **Message Care Team.**



3. Write the message that you want to send in the **Note** text box.
4. Select the check box for each member of the patient's care team you wish to send your message to.
5. Click **Send**

Update the patient's Care Team

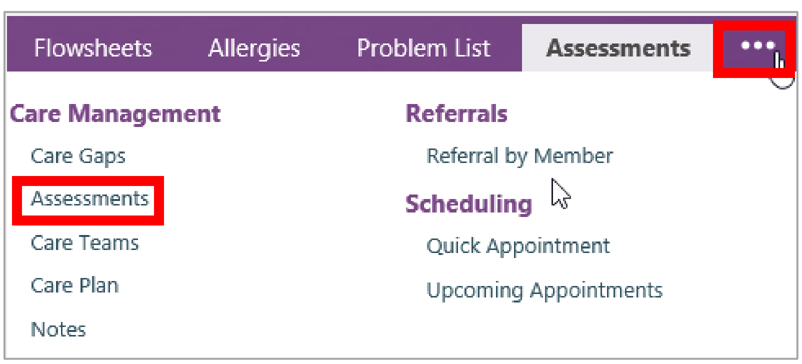
1. With the patient's chart open, go to Menu, and click **Care Teams**.
2. Select **Add PCP** or **Add Team Member** to update the patient's provider(s).
3. Search for the Provider's name and add any additional information
4. Click **Accept.**



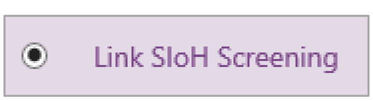
Document assessments

You can use the Assessments activity to complete assessments for a patient that have been assigned to you by Trinity Health TogetherCare. When you complete the assessment, other members of the patient's care team can see the results.

1. Select the **Care Management** tab and click **Assessments**.



2. Click on the name of an assessment to open it.



3. Document answers for each question in the assessment.
4. Optionally click to enter a comment.
5. Click **Submit Assessment.**

Orders

Place a new Order

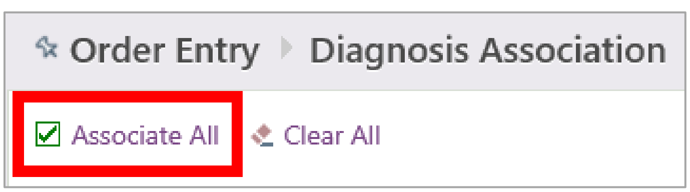
1. Select the **Patient** tab and click **Order Entry**.
2. Select a patient for the order if one was not already selected.
3. Select an ordering clinic and authorizing provider and click **Accept**.
4. Click **Preference List** to see a list of available orders.

> If you already know the name of the order in EpicCare Link, you can search for it in the "New Procedure" field.

5. Select the check box next to each order that you want to place.
   - Use the subsections in the left pane to filter orders by type.
6. Click **Accept Orders** to review a list of your orders and make any necessary changes before signing them.
7. If there's a required () or recommended () icon next to an order, you can enter more information.
8. Click an order's name to edit details like quantity or associated diagnoses.
   - For a procedure order, you can attach a file, such as a scanned image, to the order.
   - To associate a diagnosis with a single order, either select the check box for a recent diagnosis in the **Dx Association** section or enter a new diagnosis in the **Add a new diagnosis** field and press **Enter**.
9. **Accept** and **sign** the orders.
10. If there's decision support associated with any of the orders, select a follow-up and click **Accept**.

Associate diagnoses for multiple orders

1. Click the **Associate All** checkbox to associate all diagnoses with the order.



- Manually associate orders and diagnoses by selecting the appropriate check boxes.
- Select a problem from the Quick Picks list, which includes the patient's problems and recently-used diagnoses and click the left arrow ( ) icon to add the problem as a diagnosis for the encounter.
- Remove a diagnosis from the Diagnoses list by selecting the diagnosis and clicking the delete the selected diagnosis ( ) icon.

Cancel a signed order

1. Select the **Patient** navigation tab and click **Order Review**.
2. Select and cancel the order.
3. Enter a reason for canceling and click ✔ **Accept**.

Collect specimens

After you place a lab order, you can document the collection of the specimens.

1. Select the **Patient** navigation tab and click **Order Review**.
2. Select the check box next to the order and click **Collect Specimens.**
3. Enter the billing information and then click **Create Specimens.**
4. On the Specimen Details page, click **Collect** to document the current date and time and draw type.
   - If you are entering collection information retroactively, you can also manually enter this information.
5. Click **Go to Packing Lists**.

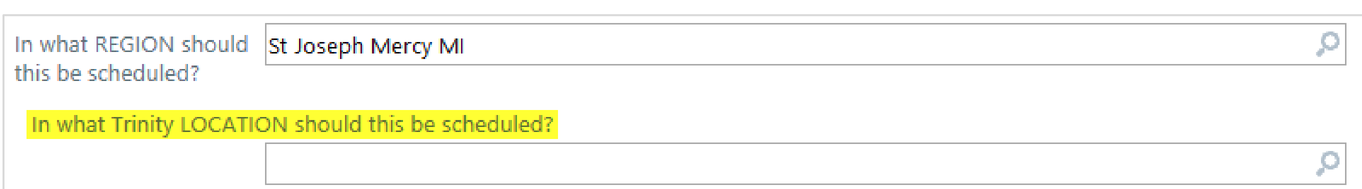
Prepare a shipping label

After specimens are collected, you can complete the shipping process.

1. From the Packing Lists activity, click **New**.
2. Confirm the packing list details and make changes as needed, then click **Create**.
3. Under the **Specimens** section, select the check box next to each specimen you want to pack.
4. Click **Pack**.
5. After the specimens are added to the **Current Packing List** section, click **Ship**.
6. Review the message that appears about the packing list no longer being editable after it's shipped, then click **Ship** to print the label

Additional Location Details for Outpatient Imaging Orders

In addition to specifying a region where you would like your radiology service to be performed, you may also choose to a specific Trinity Health location within the selected region. Please note, this does NOT apply to cardiology orders.



- Available locations are filtered per the region you've selected.
- If the region **External Performed** is selected, the additional location question will NOT appear.

Advance Beneficiary Notices (ABNs)

- Decision support is available via EpicCare Link, and a portion of that is Advance Beneficiary Notices (ABNs).
- Centers for Medicare and Medicaid (CMS) requires providers to inform patients when Medicare does not cover a procedure because it is not considered medically necessary by CMS definition.
- The Advance Beneficiary Notice of Noncoverage (ABN) form includes the services that are not covered, the reason, and the estimated cost of the items/services. This process helps the patient understand what care is recommended, whether to get the care in question and to accept financial responsibility for the service (pay for the service out-of-pocket) if Medicare will not cover payment.
- The ABN status field is a mandatory field, which will ensure that all downstream workflows will see an accurate ABN status.

Order validation

The ABN is triggered real-time when Medicare Guidelines do not support a service for the associated diagnosis.

1. Place and sign the order, entering **all required information**.
   - At this time, the LCD (Local Coverage Data) file will be referenced to evaluate the order and diagnosis association.
   - An ABN alert will appear if Medicare does not cover a procedure because it's not considered medically necessary by CMS definition.
2. Evaluate if there is an alternate medically appropriate diagnosis. If so, **Go Back** and adjust the diagnosis.

ABN Notice Status Meanings

Upon taking action on an ABN and/or following ABN discussions with the patient, it is important to update the Notice Status of the ABN as appropriate.

- The Notice status field is a mandatory field that ensures all downstream workflows are provided an accurate ABN status.
- There are checkpoints to ensure completion prior to the point of service for the patient. The ABN warnings will continue to appear until the Notice Status category is final.

Notice Status	Category	Description
Notice Triggered	Initial	• Automatically assigned to new ABN forms.
Notice Printed	Initial/ Intermediate	• Automatically assigned to ABN record when ABN is printed. • Can be initial or an intermediate status (staff may print copy of ABN before or after presenting form to patient.)
EpicCare Link Order, Regenerate at Receiving	Intermediate	EpicCare Link providers only • Provider discussed ABN with patient and patient agrees to proceed.

Location for Accurate Pricing		• ABN status will alert downstream departments to regenerate the ABN to ensure the most accurate price is reflected.
Discussed with Patient, Pending Signature	Intermediate	Trinity Health providers only • Provider discussed ABN with patient and wants front desk to print ABN and obtain signature. • Bypasses warning. Warning passed to front desk scheduler.
Discussed with Patient, Awaiting Discussion with Financial Counseling	Intermediate	Trinity Health providers only • Provider discussed ABN with patient • Patient is interested in financial counseling.
ABN Signed, Service Accepted (Option 1 – Bill Medicare)	Final	Trinity Health providers only • Patient chose Option 1 and signed ABN.
ABN Signed, Service Accepted (Option 2 – Do not bill Medicare)	Final	Trinity Health providers only • Patient chose Option 2 and signed ABN.
ABN Signed, Service Declined	Final	**Trinity Health providers only** - Select when all following conditions are true: • Patient chose Option 3 and signed ABN indicating they do not want to receive the service. • Provider should cancel order if the service will not be performed. • Provider may choose to proceed with order, however, patient will not be billed if Medicare does not pay.
ABN Refused—Noted on form Signed by Two Witnesses	Final	**Trinity Health providers only -** Select when all following conditions are true: • Patient refused to sign form, but still demands service. • Staff member has written note on the form stating that the patient has refused to sign but wants the service • Two witnesses have signed the staff member's note. • Form considered valid by Medicare, permitting organization to bill patient.
ABN Refused—Service Not Performed	Final	• **Trinity Health providers only -** Choose to indicate that the patient refused to sign the form and declined the service, so it was not performed. The order should be cancelled.
ABN Void	Final	• Trinity Health providers only • ABN form becomes unnecessary.

(Order Canceled, Changed, or ABN No Longer Applies)		• Example: Clinician might order a service, then realize the wrong dx was entered. After entering the correct dx, ABN is no longer necessary if it passes medical necessity checks. • Final status of ABN Void (Order Canceled or Changed, ABN No Longer Applies) enables users to indicate that the form is no longer necessary.
Outreach Specimen Drop Off	Final	• Trinity Health providers only – • Outreach specimen has been dropped off to lab for processing and was flagged for ABN.

ABN Notice Status Categories

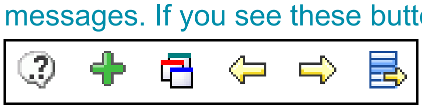
- Initial: ABN has not yet been presented or discussed with the patient.
- Intermediate: Action has been taken on the ABN, but a final disposition has not yet been documented.
- Final: A decision has been made by the patient and the ABN has been finalized. Selecting a finalized ABN will clear the ABN warning. Clinicians cannot edit an ABN after it has been assigned a final status.
- It is expected that the ABN Notice Status will change one or more times throughout the process of issuing the patient an ABN. The warning will not be satisfied until one of the final statuses is selected.
- Before choosing a final status, the patient must have been given the opportunity to review the form and all options must have been explained to them. Only after the patient chooses how they would like to proceed and signs the ABN (if applicable) should the final status be selected.

SmartTools

SmartTools are templates and shortcuts that can help you document faster.

SmartTool	Use to pull in
SmartTexts	Templates or blocks of text
SmartPhrases	Templates or blocks of text that you can create
SmartLinks	Information from another part of the cart
SmartLists	A predefined list of choices

You can use SmartTools in many places throughout the web application, such as In Basket messages. If you see these buttons, the field is SmartTool-enabled:



SmartTexts

SmartTexts are standard templates or blocks of text used to write notes for routine visits or problems you treat often, such as diabetes.

1. Click to see a list of available SmartTexts.
2. Double-click a SmartText to insert it.
3. Press F2 or use the arrow icons to complete any SmartLists and wildcards (***) in the SmartText.
    - A wildcard (***) is a placeholder. You can type over it with your own text or delete the placeholder.

SmartPhrases

SmartPhrases allow you to type a few characters that automatically expand to a longer phrase, paragraph, or template. For example, typing ".me" enters your name.

1. In a SmartTool-enabled field, enter a period (.) followed by the SmartPhrase's name. For example, enter ".me". As you type, a list of matching SmartPhrases and SmartLinks appears.
2. Use the arrow keys to select the SmartPhrase you want to use and press Spacebar to insert it.
3. Press F2 or use the arrows to complete any SmartLists and wildcards (***) in the SmartPhrase.
    - A wildcard (***) is a placeholder. You can type over it with your own text or delete the placeholder.

SmartLinks

SmartLinks help you write more quickly by pulling or "linking" information from the patient's chart directly into your documentation. SmartLinks often appear within SmartPhrases, but you can also use them on the fly. To pull one in, enter a period (.) followed by the SmartLink's name, as you do when using a SmartPhrase.

SmartLists

SmartLists are lists of common choices that help you quickly customize your documentation. For example, a symptoms SmartList might contain choices like wheezing and chest pain. SmartLists are used in SmartTexts and SmartPhrases and look something like this: {symptoms:406}.

1. Press **F2** to jump to the next SmartList or wildcard (***) in your note. Some values in a SmartList might be selected by default. You can change them if needed.
2. Click other values to select them.
    - A yellow background indicates that you can select only one value.
    - A blue background indicates that you can select one or more values.
3. If you accidentally select a value, click again to clear it.
4. To save your selections and move to the next SmartList or wildcard, right-click or press **Enter.**

You can save time by documenting any abnormal values first and then applying any default values for the remaining SmartLists in one click. After selecting abnormal values, click on the SmartTool toolbar to apply any available default values for the remaining SmartLists.

Manage Your Account Settings

You can use the EpicCare Link settings options to perform a variety of account maintenance tasks, including changing your password and setting the page that appears when you first log in. In addition, you can choose to receive email notifications at an external email address when you are granted access to a patient. You can set your preferences for these notifications, as well as specify the email address at which you'd like to receive them.

Change your password

1. Go to **Menu > Settings > Change Password.**
2. Enter your old password, then a new password, and then your new password again.
3. Click **Accept.**

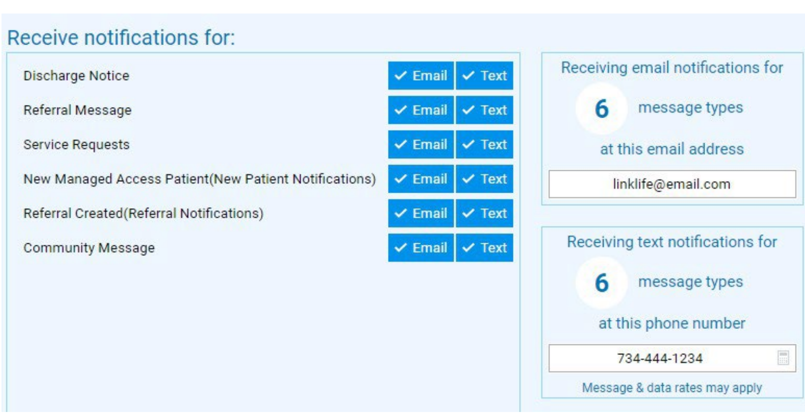
Change your default login page

1. Go to Menu > Settings > Set Default Page.
2. Go to the page that you want to set as your default page.
3. Click Set Default Page to set the current page as your default page.

Text and Email Notifications

In addition to notifications received in your In Basket through Event Monitor, you may choose to be notified of alerts via email or text. Alert options may vary by role.

1. Go to Menu > Settings > Notification Preferences
2. **Select/deselect checkboxes** for the listed alerts according to your preference.
    - Checkboxes for notifications you've turned on will appear in blue.
3. Enter your **email** and **phone number** in the fields on the right.
4. Click **Accept.**



Victoria Mathis 12/20/2023

Manage Your Clinic (Site Admin Workflows)

Change a User's Password

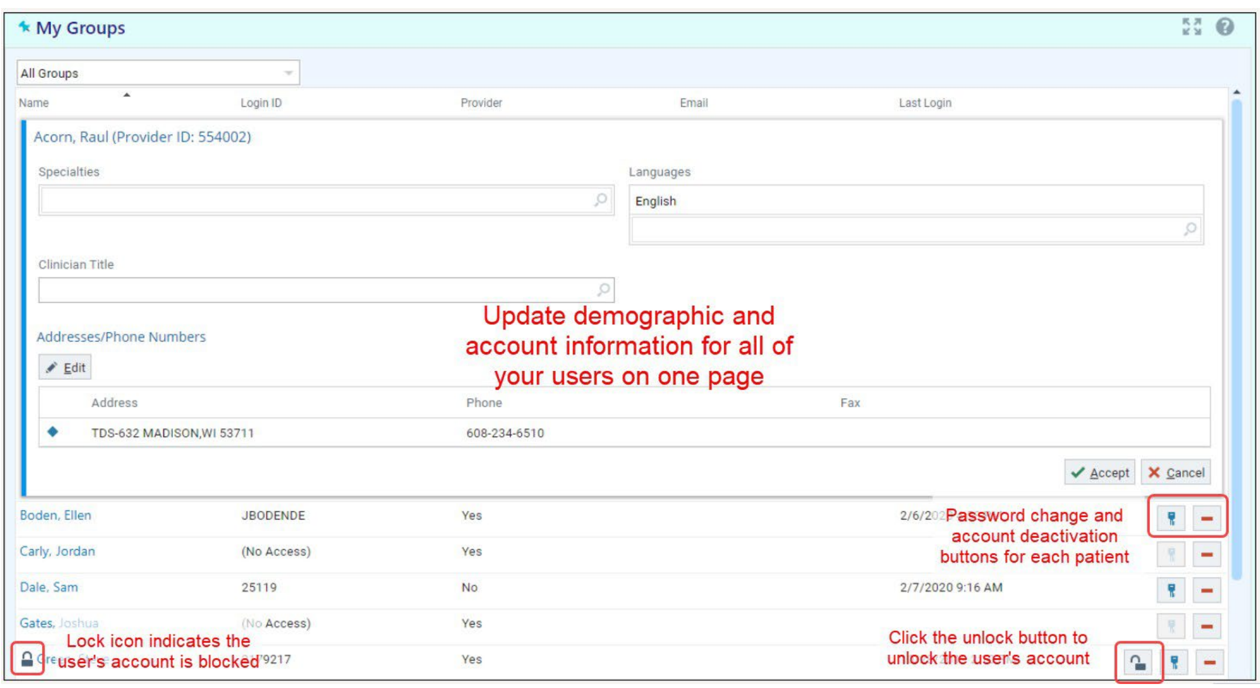
1. Select the **Admin** tab and click My Groups.
2. Click the key icon in the row for a user to change their password.
3. In the **N**ew password and **Verify New Password** fields, enter the new password for the user.
4. In the **Password for <your name>** field, enter your password.
5. Click **Accept**.
   - The next time the user signs in using this password, she will be prompted to select a new password of her choice.

Deactivate a user

1. Select the **Admin** tab and click **My Groups**.
2. Click the minus icon in the row for a user to deactivate them.
3. Enter a comment indicating why you're deactivating the user and click Deactivate.

Unblock a User's Account

1. Select the Admin tab and click My Groups.
2. Find the user whose account is blocked.
   - A lock icon will display to the left of the the user's name.
3. Select the unlock button to the right of the user's name to unlock the user's account.



Request a new user in EpicCare Link

1. Select the **Admin** tab and click **Account Requests**.
2. Click ✚ Request New Account.
3. Choose the type of account you want to create. For example, to create an account for a new physician at your site, click **Request access for a new provider**.
4. In the **User group** field, select the user group to which the user should belong.
5. If you're requesting an account for a new provider and that provider doesn't need to log in to the application, select the check box under the **Basic Information** section to indicate as such.
6. Enter the user's demographic information.
7. Enter a comment about your request, if necessary, and click ✓**Submit Reques**t. After your request has been processed, the new user will receive a login instructions letter.

ⓘ	You can see the status of user requests that have been submitted in the Status column.

Update facility contact information

1. Select the **Admin** tab and click **My Facilities**.
2. Click the name of a facility to update its contact information, including the phone number, fax number, and address.
3. After you've finished editing contact information, click ✓**Accept.**

ⓘ	If an active address isn't on file, you can search for a matching address by entering an address and clicking **Find Address**. Alternatively, click **Manual Entry** to enter all of the address information yourself.

Verify users

You might receive a Site Verification message from your Epic organization asking you to verify that all users working at your site are current and active. These users might include providers who don't log in to the web application but are listed because they need to schedulable.

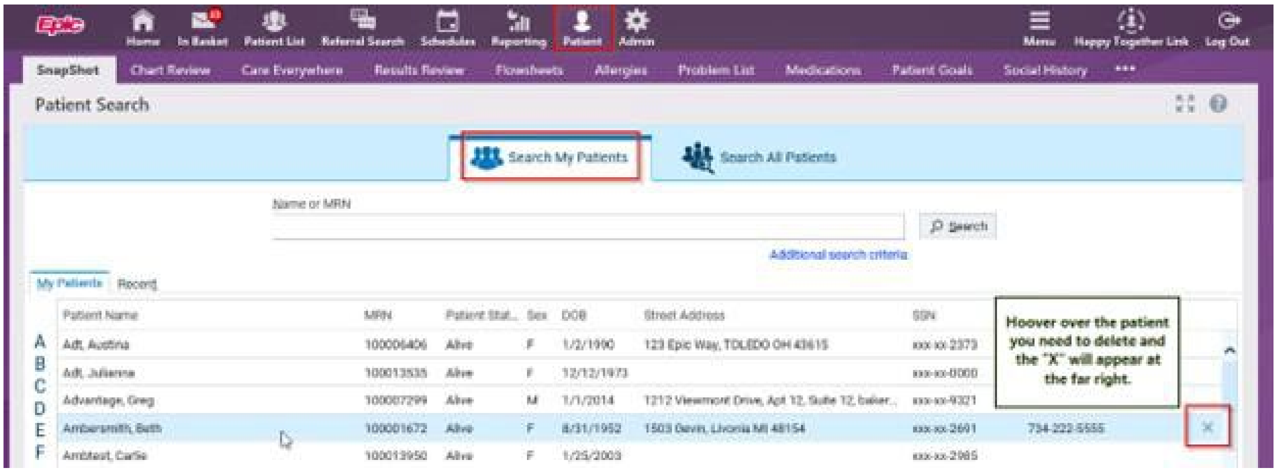
From the message, you can click **Verify Now** and you are brought to the Site Verification activity. From the Site Verification activity, you can verify that all the users and providers working at your site are current, and you can deactivate users as needed to prevent unauthorized access by users whose accounts are outdated.

1. In the Active? column, select No for all the users whose accounts you want to deactivate.
   - You can enter a comment in the **Comments** field that appears.
2. Select the **Acknowledgement** check box to acknowledge that you have reviewed and confirmed the list of users.
3. Click ✓Verify to verify the list of users and close the screen.

Remove a patient from the Patient List

Only Site Administrators have the security to remove a patient from your Patient List.

1. Navigate to the Patient activity.
2. Select **Search My Patients**.
3. Hoover over the patient you need to remove, and the "X" will appear at the far right.
4. Click the "X".



Update providers

The providers (Physicians, NP, PA) at your site's location is what drives the Patient List, so it's important to have your provider group up to date. If you have changes to your providers in your practice, please contact your Health Ministry Link Coordinator to have them update the build of your group.

- You can find your Link Coordinator's contact information in the Customer Support Contact sheet under the Quick Links in EpicCare Link.