



How to submit an E-Consult/ Ambulatory Referral for EpicCare Link Users

Terminology:

- **E-Consult:** These are referrals to specialty services that have a specialist clinician who reviews the referral. They might send for scheduling immediately, reply with additional questions before ultimately scheduling the patient, and/or provide virtual specialty care.
 - Breast Surgery ENT Neurosurgery Rheumatology Derm for HPAC only
 - Buprenorphine General Surgery OMFS TB
 - Cardiology GI/Liver Ophthalmology Urogynecology
 - Chest Pulm Hematology/Onc Pain Vascular
 - Diabetes Nephrology Plastic surgery Women's Services
 - Endocrinology Neurology Podiatry Wound
- **Ambulatory Referral:** There are some specialty services within the Alameda Health System that do not have clinician reviewers and requests go straight to scheduling. For these services, it will be called "Ambulatory Referral" and patients will be scheduled on a first come, first serve basis when ordered with a status of routine. At this time, Alameda Health System only allows Ambulatory Referrals for the following Specialties (please use the E-Consult workflow for Referrals to Specialty Services **not** included in this list):
 - Audiology
 - Physical Therapy
 - Occupational Therapy
 - Speech Therapy
 - Optometry
 - Orthopedic Surgery
 - Ortho Back
 - Physical Medicine Rehab

Who can submit:

- Clinical Support Staff (RN, MA, SW, etc.)
- Clinician (MD, NP, PA)
- Support Staff and Referral Coordinators can also submit on behalf of any independent clinician, such as an MD, NP or PA. This clinician is considered the Authorizing Provider for the E-Consult/ Ambulatory Referral Order.

Notifications about E-Consults/ Ambulatory Referrals:

- There will not be any email notifications related to E-Consults and Ambulatory Referral activity by default, however users are able to setup their own personal notification settings which will allow for email notifications for new in-basket messages.
- Referring Providers will receive In Basket Notifications in the following instances:
 - When there is a reply from the Specialist Reviewer to the Referring Provider asking for more clarification or providing treatment/management guidance.
 - When a patient has been triaged for an appointment with the specialist ("Accepted" for scheduling)

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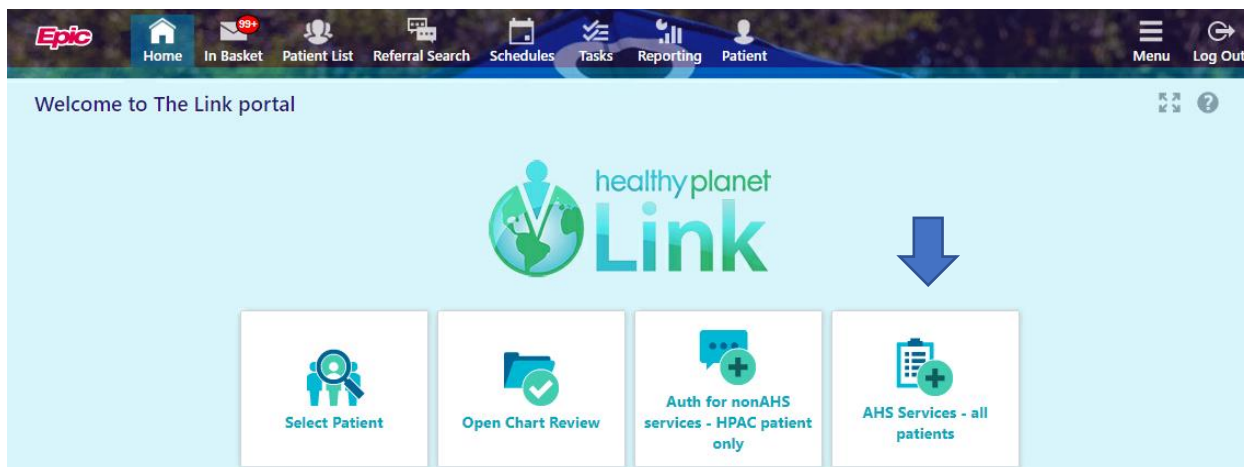
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How to submit an E-Consult/ Ambulatory Referral

Step 1: Log in to the Alameda Health EpicCare Link System

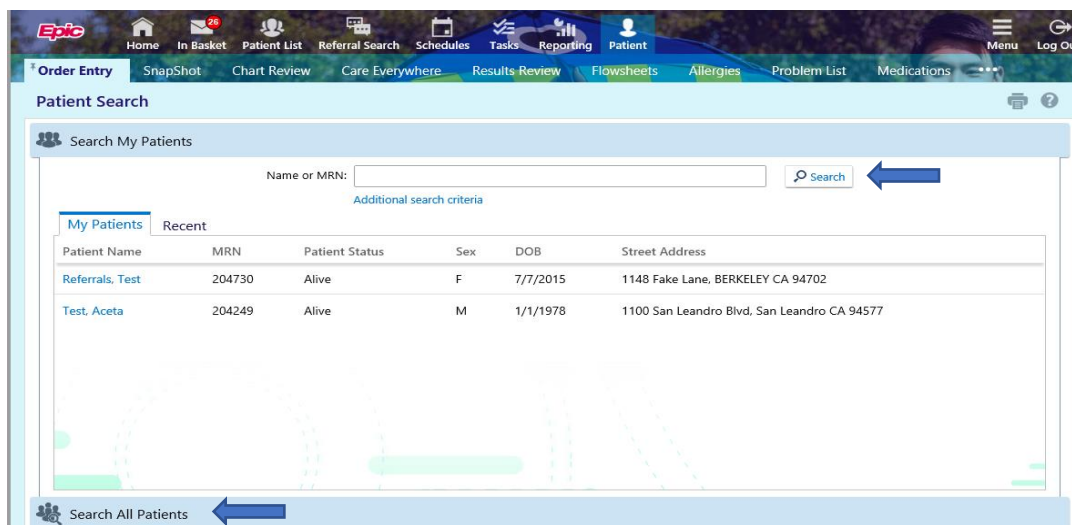
Step 2: Click on “**AHS Services- all patients**” to place any type of order, including a diagnostic, E-Consult or Ambulatory Referral Order.

Note: The Create Referral button is used to store authorization information for services outside of AHS for patients with HPAC. This is not an order for consultation but procedure codes that need to authorize by the UM Department.



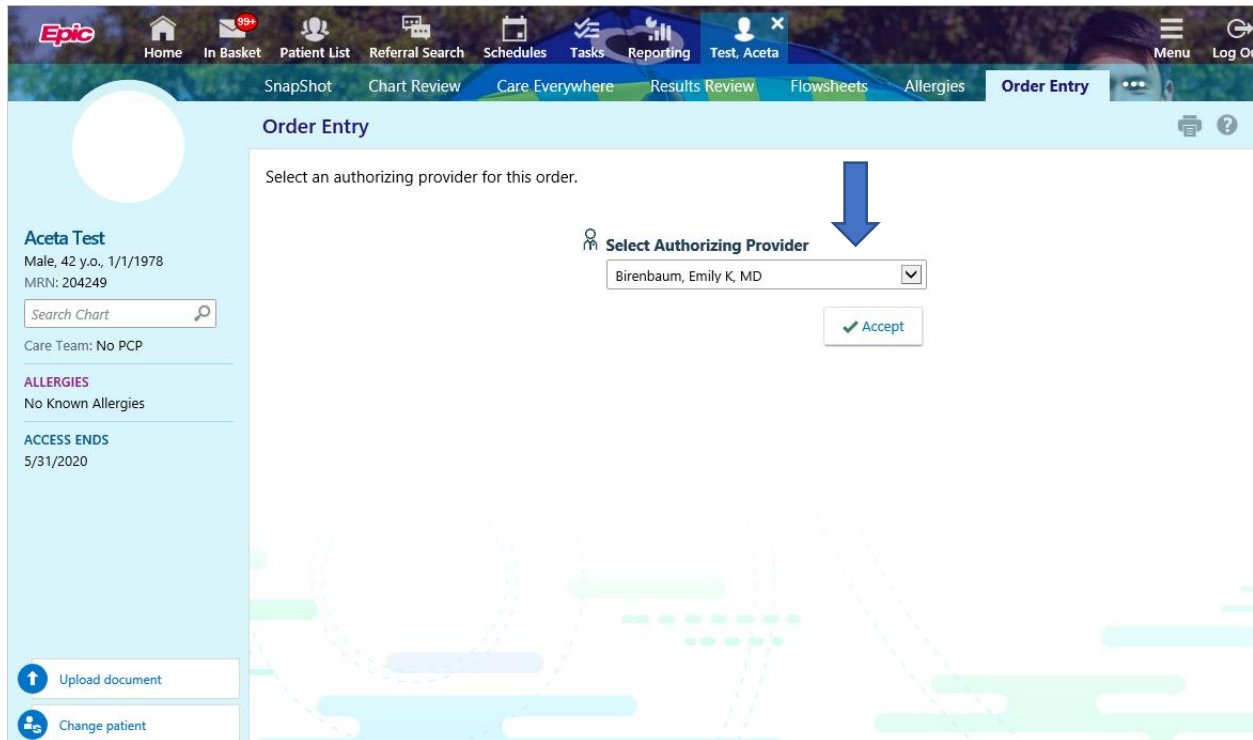
If you cannot find the patient because he/she has not yet had contact with the Alameda Health System, you must have the Referral Coordinator send to AHS to create a new chart (see EpicCare Link Patient Creation a separate guide).

Step 3: Open a patient’s chart. You can search your Patient List using the toolbar near the top of the screen or you can search among all patients who have had contact with Alameda Health System.



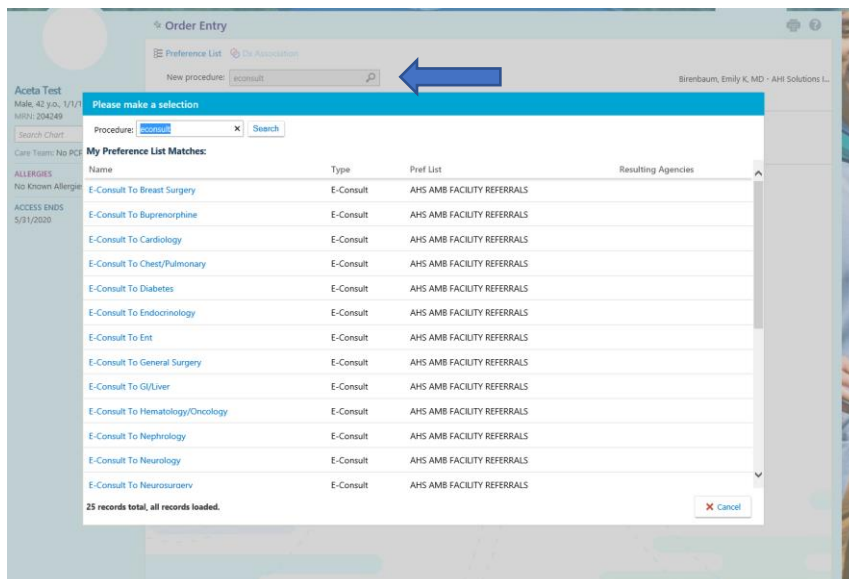
Step 4: Select an **Authorizing Provider** for the E-Consult/ Ambulatory Referral and click “Accept” (Clinicians can skip to step 5)

If a provider is not in the list, please alert the Clinic Manager/Site Administrator who is responsible for keeping the clinic/department’s setup up to date.



Step 5: Order Entry


To place a new E-Consult/ Ambulatory Referral, use the New Procedure lookup tool. Type in the name of the Specialty Service to which you are submitting an E-Consult/ Ambulatory Referral and then select the appropriate Referral. To see a list of all E-Consult Referrals available to you, type “**econsult**” in the New Procedure field and press enter.



Name	Type	Pref List	Resulting Agencies
E-Consult To Breast Surgery	E-Consult	AHS AMB FACILITY REFERRALS	
E-Consult To Buprenorphine	E-Consult	AHS AMB FACILITY REFERRALS	
E-Consult To Cardiology	E-Consult	AHS AMB FACILITY REFERRALS	
E-Consult To Chest/Pulmonary	E-Consult	AHS AMB FACILITY REFERRALS	
E-Consult To Diabetes	E-Consult	AHS AMB FACILITY REFERRALS	
E-Consult To Endocrinology	E-Consult	AHS AMB FACILITY REFERRALS	
E-Consult To Ent	E-Consult	AHS AMB FACILITY REFERRALS	
E-Consult To General Surgery	E-Consult	AHS AMB FACILITY REFERRALS	
E-Consult To GI/Liver	E-Consult	AHS AMB FACILITY REFERRALS	
E-Consult To Hematology/Oncology	E-Consult	AHS AMB FACILITY REFERRALS	
E-Consult To Nephrology	E-Consult	AHS AMB FACILITY REFERRALS	
E-Consult To Neurology	E-Consult	AHS AMB FACILITY REFERRALS	
E-Consult To Neurosurgery	E-Consult	AHS AMB FACILITY REFERRALS	

Once you have selected the E-Consult Referral, Order Decision Support information will be displayed which includes the recommended criteria for the specific E-Consult Referral you selected during Order Entry. Review this information to determine if your Referral is appropriate for E-Consult. If the Specialty you are placing an E-Consult Referral to has any recommended Pre-Consult Work-Up, this information will be called out here as well.

Order Entry
Order Decision Support



E-Consult Cardiology Criteria

Cardiology Clinic Referrals
Appropriate referrals include:
Abnormal stress tests suggestive of coronary artery disease.
Evaluation of known coronary artery disease if not currently followed by cardiologist or with worsening symptoms or LVEF.
New heart failure.
Heart failure refractory to standard medical therapy.
Palpitations, arrhythmias, pacemakers, defibrillators.
Acquired valve disease with worsening symptoms or left ventricular dysfunction, or management questions.
Acquired valve disease with valve replacement or repair.
Adults with congenital heart disease.
Unexplained syncope.
Anticoagulation management decisions.

Recommended Pre-Consult Work-up:
A-The following tests are recommended prior to all cardiology appointments
CBC
Electrolytes and creatinine
Fasting lipid panel
TSH
Hemoglobin A1C for diabetics
Recent EKG
Recent Echocardiogram.
B-In addition to the above:
For patients with chest pain, include:
Appropriate stress test
For patients with syncope, palpitations or arrhythmia include
24 Hour Holter Monitor

For patients with Cardiomyopathy, include If the above requirements are not met and completed prior to referral submission, it may result in the referral being sent back to the referring provider to complete the requirements

If patient is already established and just needs follow up, do not place a referral; please call the scheduling line: 510-437-4401



After reviewing this information, click **"Accept"** to open the Order Composer. If the "Accept" button is greyed out, scroll to the bottom of the page to enable it.

Note: If the patient is already established and just needs follow-up, DO NOT place a Referral. Please call the Scheduling line for this Specialty directly to setup and appointment.

Step 6: Answer all applicable questions. Questions with an exclamation mark are required.

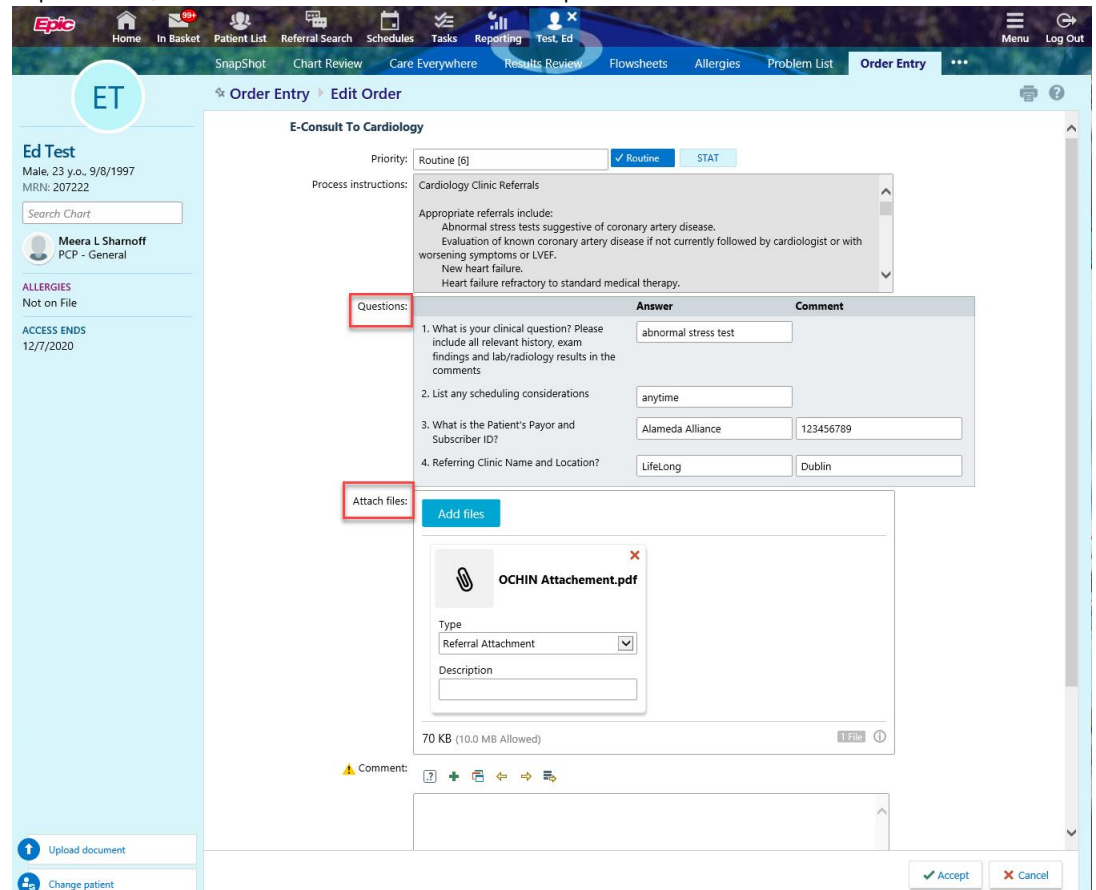
Attachments: Lab Results and Radiology Results should be attached to E-Consults from your native health record system. Use **File Type** “Referral attachment” this will create a note on the referral and be linked to the referral.

Note: The maximum file size is 20 megabytes.
The following file types can be uploaded:

- BMP
- GIF
- JPG
- JPEG
- PNG
- TIF
- TIFF
- PDF

Once you have completed all relevant questions for the E-Consult/ Ambulatory Referral, uploaded any optional attachments, completed any additional documentation in the Comments field, entering your site name first then the additional information on the next line, then select an appropriate **ICD10 code**, click **“Accept”** in the bottom right corner of the screen. You will then be directed back to the Order Entry screen to **Sign the Order**. If needed, you may also click **“Cancel”** to discard the order.

Note: If the diagnoses in the “Recent diagnoses” list do not apply to the E-Consult/ Ambulatory Referral request, click the “Add a new diagnosis” search button to identify a more appropriate ICD10 code. You can search by diagnosis name or ICD10 code.



E-Consult To Cardiology

Priority: Routine [6] ☒ Routine ☐ STAT

Process instructions: Cardiology Clinic Referrals

Appropriate referrals include:
 Abnormal stress tests suggestive of coronary artery disease.
 Evaluation of known coronary artery disease if not currently followed by cardiologist or with worsening symptoms or LVEF.
 New heart failure.
 Heart failure refractory to standard medical therapy.

Questions:	Answer	Comment
1. What is your clinical question? Please include all relevant history, exam findings and lab/radiology results in the comments	abnormal stress test	
2. List any scheduling considerations	anytime	
3. What is the Patient's Payor and Subscriber ID?	Alameda Alliance	123456789
4. Referring Clinic Name and Location?	LifeLong	Dublin

Attach files:

OCHIN Attachment.pdf

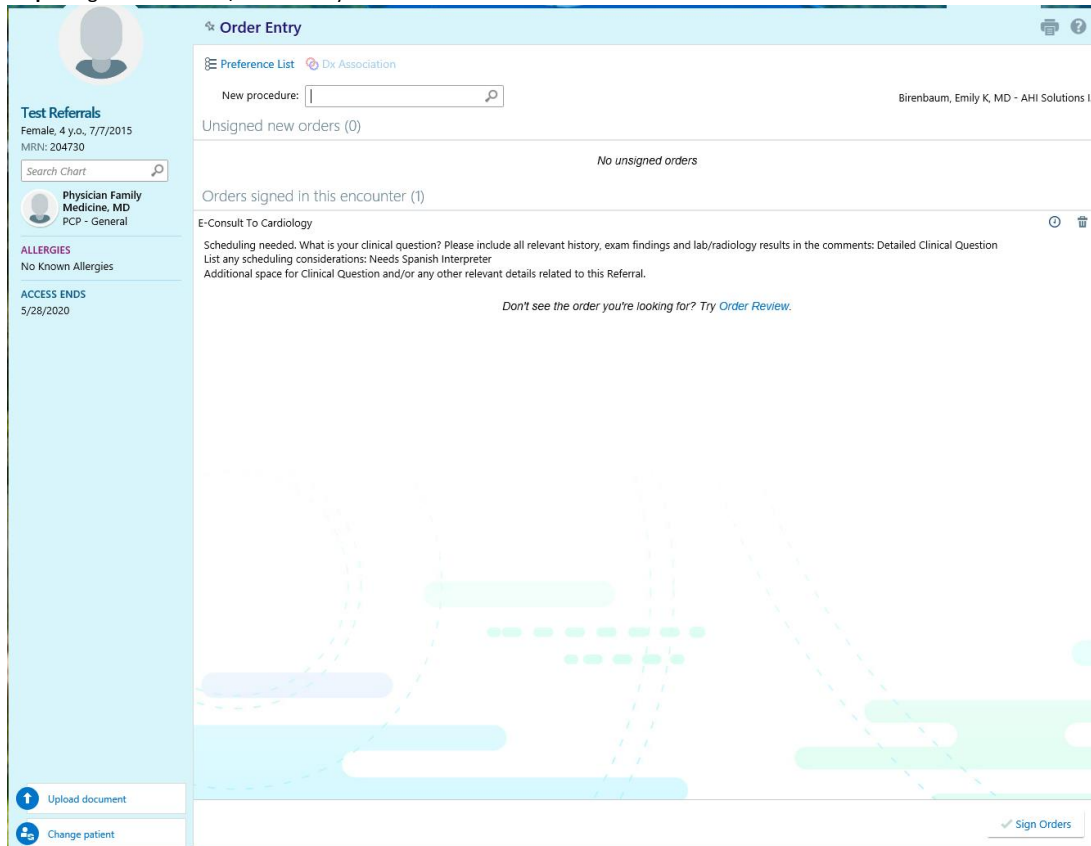
Type: ☒ Referral Attachment

Description:

70 KB (10.0 MB Allowed)

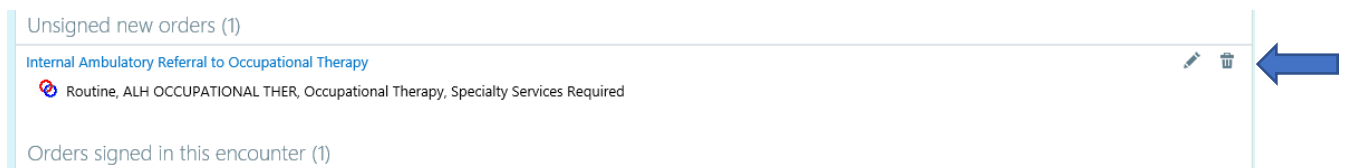
Comment:

Step 7: Sign the E-Consult/ Ambulatory Referral Order.



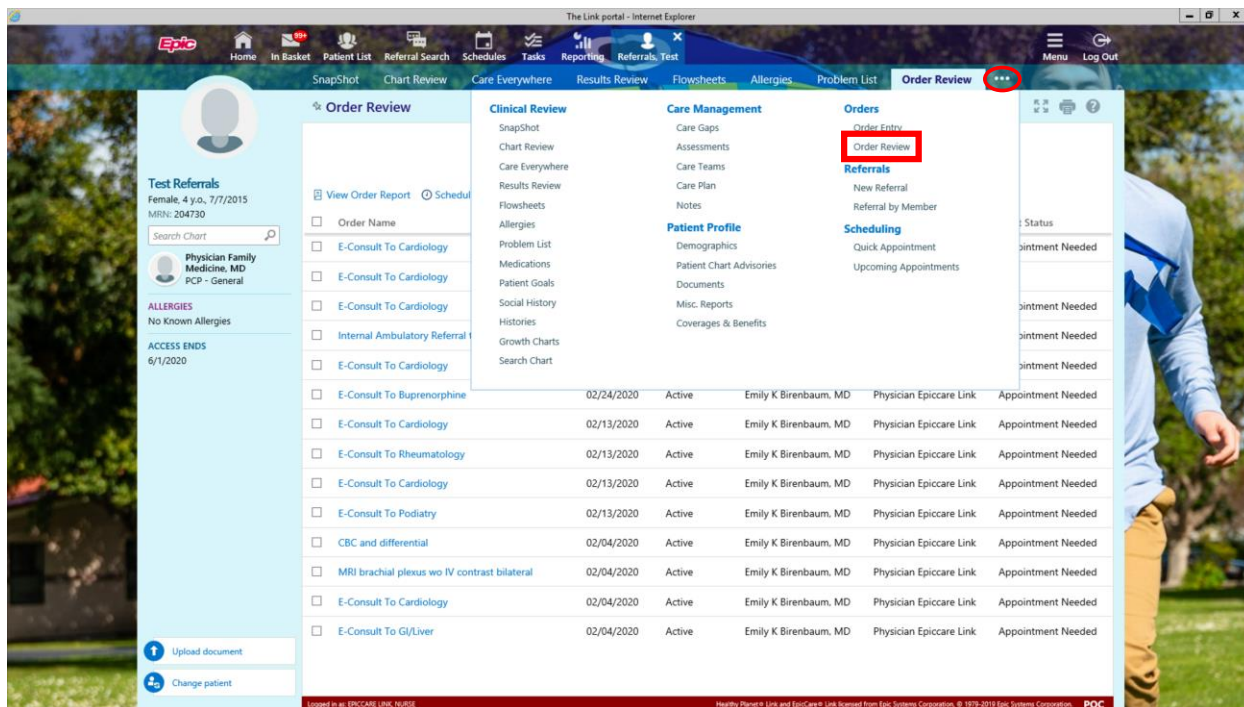
After signing the order, you will be directed back to the Order Entry screen. The order will now appear under the section titled “Orders Signed in this Encounter.”

On this screen, you can also view all unsigned “Draft” orders specific to the user who is logged into EpicCare Link (i.e. Referral Coordinator). This list includes both unsigned E-Consult/ Ambulatory Referral and unsigned Radiology orders. If appropriate, take this opportunity to complete any remaining unsigned orders. If any of these orders are no longer needed, you can quickly and easily Cancel them by clicking the Trash icon to the right of each order, respectively.

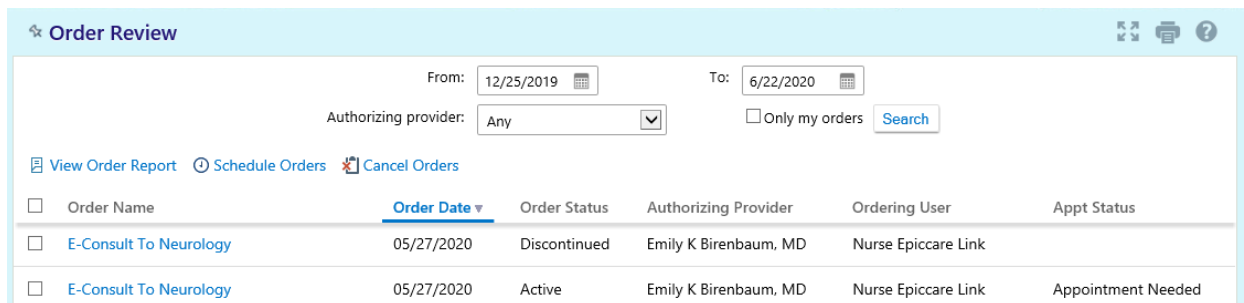


How to view all prior E-Consults, Referrals and Diagnostic Orders

In a patient's chart, click "Order Review" located under the tab with three white dots (indicating additional options are available).



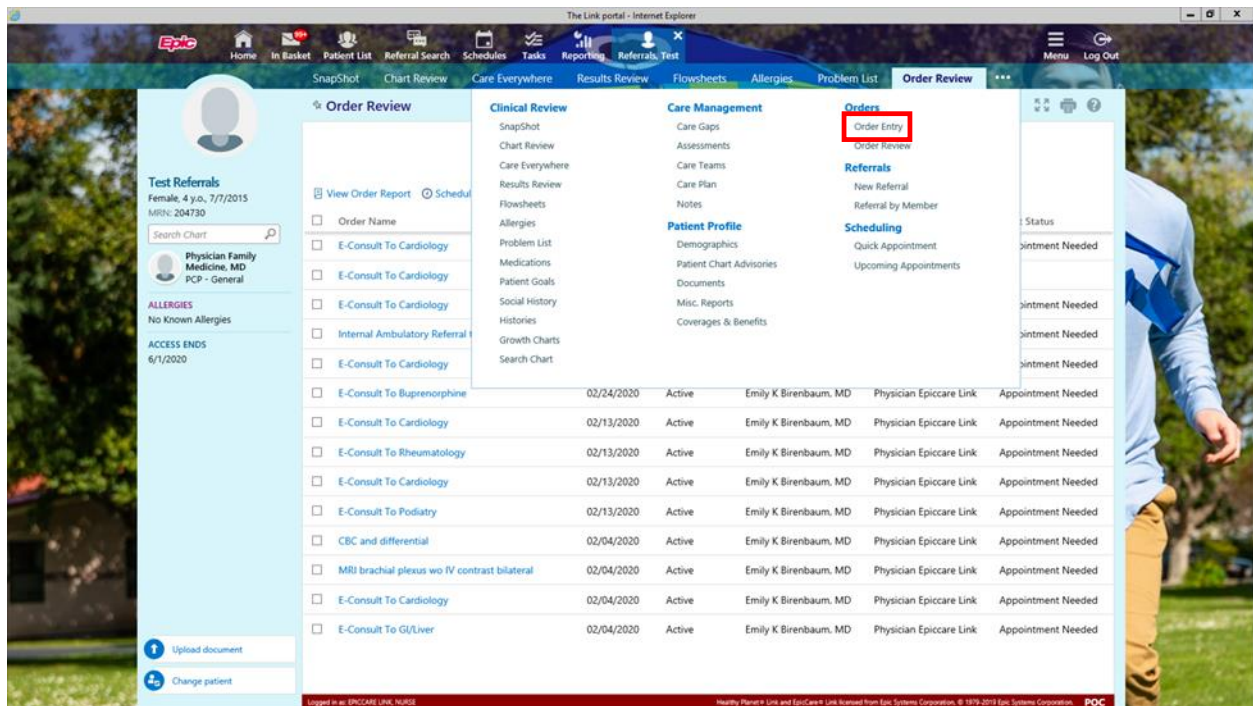
This jumps you to the Order Review page for this specific patient. From here, you can quickly review all prior orders placed for this patient in the last 6 months. Click on the Order Name to view E-Consult/ Ambulatory Referral details. If you need to view an order that was placed more than 6 months ago, you can update the Date parameters by adjusting the "From" and "To" fields. Additionally, you also have the option to filter by Authorizing Provider. Please disregard the Appointment Status column on the far-right as this data is erroneous. Details about a patient's Scheduling Status will be communicated to the Authorizing Providers In Basket.



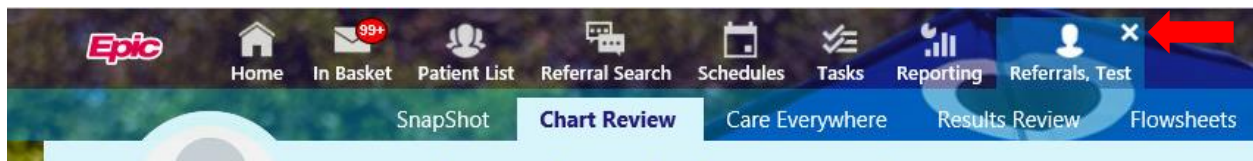
Order Name	Order Date	Order Status	Authorizing Provider	Ordering User	Appt Status
E-Consult To Neurology	05/27/2020	Discontinued	Emily K Birenbaum, MD	Nurse Epiccare Link	
E-Consult To Neurology	05/27/2020	Active	Emily K Birenbaum, MD	Nurse Epiccare Link	Appointment Needed

To see additional details for a specific E-Consult/ Ambulatory Referral, select the order by clicking in the "Order Name" column for the specific order you would like to review.

To submit additional orders for the same patient, click “Order Entry.”



To submit an E-Consult/ Ambulatory Referral for a different patient, click the “X” located next to the patients’ name in the toolbar at the top of the page.



If you are a Clinician completing this workflow, you will be redirected to the main EpicCare Link homepage where you can select “Place Order” to place an E-Consult/ Ambulatory Referral for a different patient. Users who are **not** Clinicians will instead be redirected to the Patient Search homepage, where they can select a new patient as well as an Authorizing Provider prior to placing any new orders.

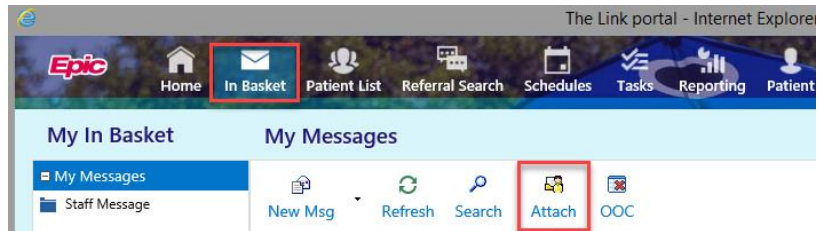
How to Attach to an In Basket

Replies from specialist reviewers will appear in the provider's in-basket folder. Providers need to attach each Referral coordinator to their In Basket so the Referral Coordinator can see and take action on the E-Consult messages sent by the specialist Reviewer

To attach the Referral coordinator:

Select **In Basket**

Select **Attach**



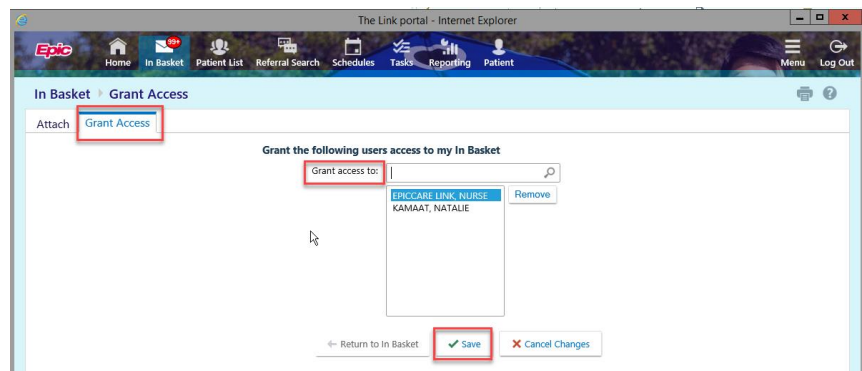
Select **Grant Access**

Enter the partial name of the Referral Coordinator

Click enter

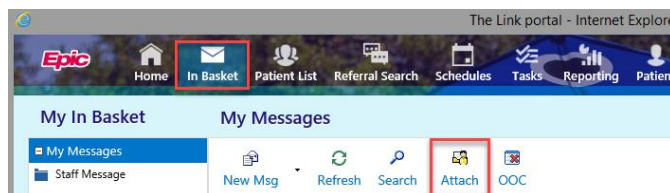
Add all that will be viewing the provider In basket

Select **Save**



The Referral Coordinator will select **In Basket**

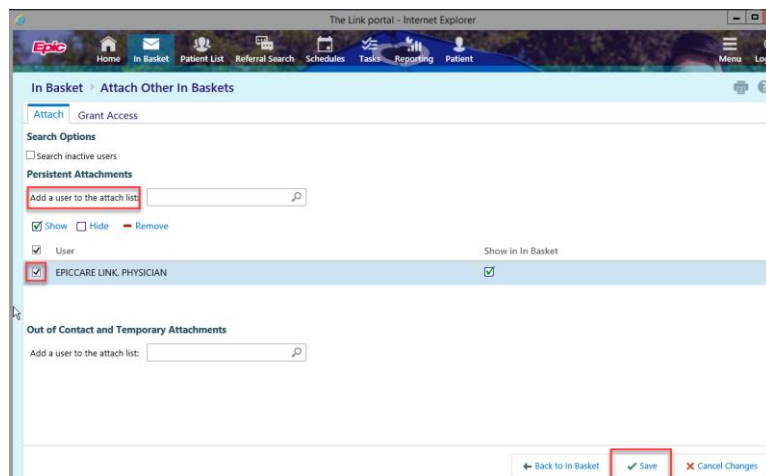
Select **Attach**



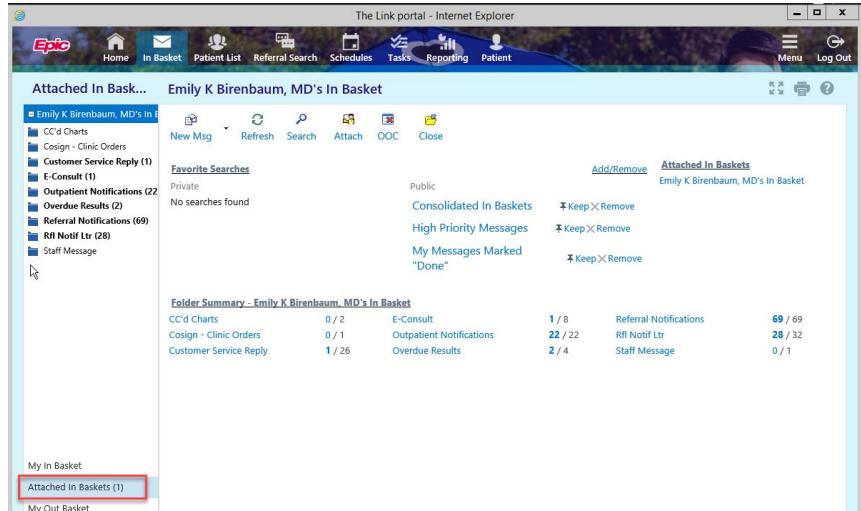
Add physician to the attach list

Select the box for the Physician added

Select **Save**



When in the In Basket select **Attached In Baskets**



How to view responses from the specialist review and send a response to the specialist reviewer (back-and-forth communication)

Responses to e-consult orders placed will arrive to the providers in-basket

- (1) Responses from the specialist via e-consultation will appear in the E-consult folder
- (2) Decision to schedule the patient for a specialist appointment will result in a notification letter in a Referrals folder

Replies from specialist reviewers will appear in an in-basket folder named "E-consult." Access the e-consult in-basket by clicking on that folder. (Referral coordinators will need to attach themselves to the referring providers' in-baskets to review their e-consult messages).

E-Consult (1)

- Brand new dialogue is listed as "New" and is bolded
- Specialist dialogue that you have previously read is listed as "Read" and is not bolded
- The presence of a green ball icon denotes that you are responsible for taking action on the e-consult dialogue. E-Consults that are in your in-basket without the green ball icon have been sent to you as an FYI. You cannot take action on these E-Consults, but you must read them, and mark as "done" after you have done so. This does not affect the status of the E-Consult in another provider's In Basket. It will still remain active with the provider responsible for the consult (who will have the green ball).
 - Note: if the referral coordinator is attached to the provider's In Basket, they can respond on the provider's behalf (with the provider's input)

Attached In Basket... Emily K Birenbaum, MD's In Basket E-Consult

[New Msg](#)
[Refresh](#)
[Done](#)
[Close E-Consult](#)
[Take](#)
[Search](#)
[Sort](#)
[Properties](#)

Priority	Status	Sent Date	Sent Time	From	Department	Patient
<input type="checkbox"/>	Read	03/02/2020	1:07 PM	Physician One Cardiology, MD	Cardiology	Test, Aceta
<input type="checkbox"/>	Read	02/28/2020	4:06 PM	Physician One Cardiology, MD	Cardiology	Referrals, Test
<input type="checkbox"/>	Read	02/04/2020	3:30 AM	Suneet Kaur Grewal, MD	Family Medicine	Test, Aceta
<input type="checkbox"/>	Read	05/24/2019	12:48 PM	Physician One Cardiology, MD	Cardiology	Adams, Stemi
<input type="checkbox"/>	Pend	05/07/2019	9:36 AM	Physician One Cardiology, MD	Cardiology	MyChart, Theodore
<input type="checkbox"/>	Pend	05/02/2019	4:10 PM	Physician One Cardiology, MD	Cardiology	Ahrends, Eli
<input type="checkbox"/>	Read	04/02/2019	9:21 AM	Physician One Cardiology, MD	Cardiology	Adams, Jane
<input type="checkbox"/>	Read	04/01/2019	10:32 PM	Physician One Cardiology, MD	Cardiology	Adams, Jane
<input type="checkbox"/>	Read	03/27/2019	12:12 PM	Physician One Cardiology, MD	Cardiology	Adams, Jane
<input type="checkbox"/>	Pend	03/27/2019	11:51 AM	Physician One Cardiology, MD	Cardiology	Alvarez, Gloria
<input type="checkbox"/>	New	02/13/2019	2:36 PM	Martha E. Funkhouser	Dermatology	Adams, Jane
<input type="checkbox"/>	Read	02/13/2019	2:22 PM	Martha E. Funkhouser	Dermatology	Adams, Jane
<input type="checkbox"/>	Read	02/13/2019	2:48 PM	Martha E. Funkhouser	Dermatology	Adams, Jane

E-Consult Emily K Birenbaum, MD's In Basket

Counts	New	Total
	4	17

Legend

- High Priority
- Low Priority
- Critical
- Abnormal
- Previous Abnormal
- Cc
- Work Taken By You (Click icon to put back)
- Work Assigned To Your Pool (Click icon to take)
- Work Taken By Others (Click icon to take)
- Work Assigned To You

Step 1: Click an **E-Consult** message to view the response from the Specialist Reviewer. Details of that E-Consult will appear on the right hand side. Note the following sections of the E-Consult:

- The **Message** section includes all back-and-forth dialogue between the referring provider and the Specialist Reviewer.
- The **Order Questions** section includes the original E-Consult questions and answers based on the initial documentation from the original order.

The Link portal - Internet Explorer

Home In Basket Patient List Referral Search Schedules Tasks Reporting Ambulatory, Ian

Menu Log Out

My In Basket **My Messages** **E-Consult**

[New Msg](#)
[Refresh](#)
[Done](#)
[Finalize E-Consult](#)
[QuickNote](#)
[Take](#)
[Search](#)
[Sort](#)
[Properties](#)

Priority	Status	Sent Date	Sent Time	From	Department	Patient
<input checked="" type="checkbox"/>	Read	05/27/2020	4:58 PM	Physician Neurology, MD	Neurology	Ambulatory, Ian
<input type="checkbox"/>	Read	05/27/2020	4:52 PM	Physician Neurology, MD	Neurology	Ambulatory, Ian

[Message](#)
[Visit Summary](#)
[Patient Info](#)
[Meds/Problems](#)
[Vitals/Labs](#)
[My Last Note](#)
[Help](#)

Message

Physician Neurology, MD to Nurse Epiccare Link: Emily K Birenbaum, MD; 5/27/2020 4:58 PM

Attached Progress Notes

Sorry the recommended treatments did not work. Lets also try the following and we will schedule this patient to be seen as soon as possible.

[View previous messages](#)

Scheduling Information

Decision: Accept

Priority: Routine

Schedule by Date: 6/26/2020

Comments: Physician Neurology, MD 5/27/2020 4:59 PM PDT

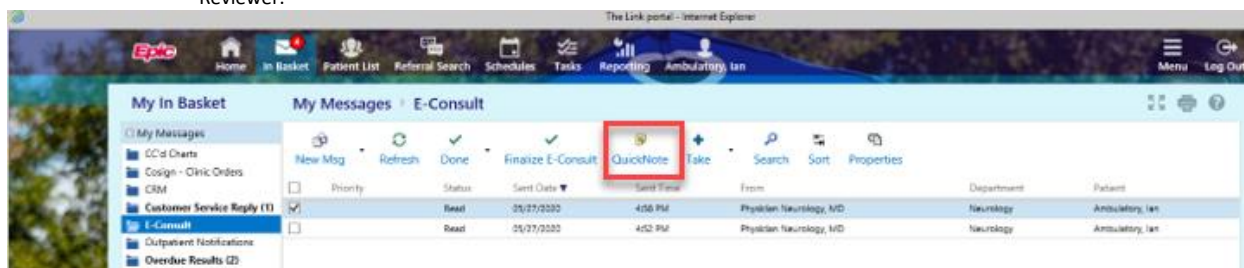
Please schedule patient as soon as possible.

Order Questions

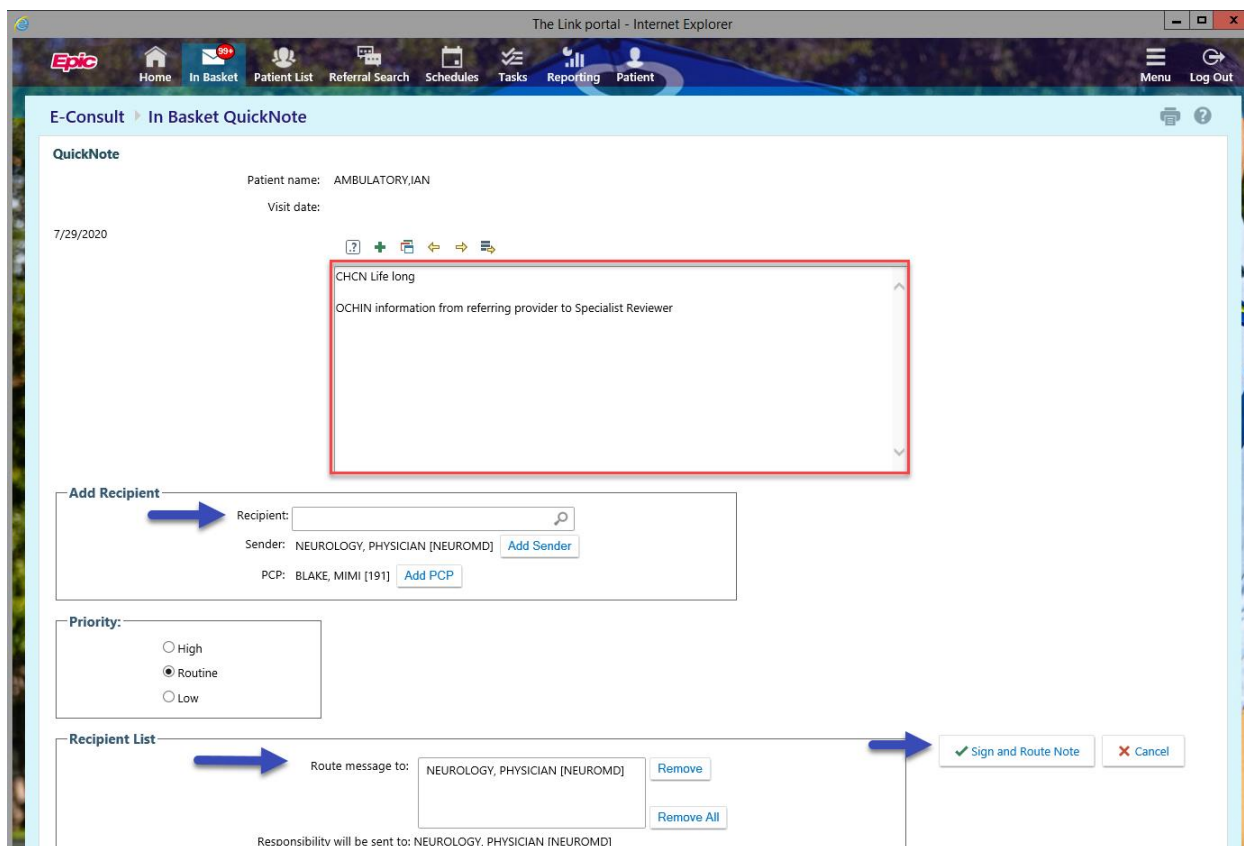
Question	Answer	Comment
What is your clinical question?	5bf severe migraines, tried multiple medications and nothing seems to resolve headaches.	

Step 2: Take an action related to the E-Consult. There are two possible actions:

- Option 1. Close the encounter using the "Finalize E consult" button. We recommend finalizing E-Consults when the dialogue is complete, and no further recommendations are needed. However, remember that E-Consults cannot be re-opened once they are finalized, but all prior E-Consults can be found within a patient's chart.
 - Important note:** If an E-Consult has not already been flagged for scheduling, marking an E-Consult message as Complete will fully close out that request, meaning it cannot be scheduled. You can check whether an E-Consult has been flagged for scheduling by reviewing the "Scheduling Information" section of the E-Consult message. If it says "Decision: Accept", then it has been flagged for scheduling. If it says "Decision: None", then it has not.
- Option 2. Reply to the specialist reviewer using the "QuickNote" button. Enter response in the dialogue box.
 - Important note:** The response from the Specialist Reviewer will not appear after you select QuickNote. users copy and paste the Specialist response into the QuickNote response box. If you do this, please delete the text that you copied/pasted before completing your consultative response. Otherwise, this will be listed twice for the Specialist Reviewer.



- Step 3: Manually route the response to the appropriate specialty specific E-Consult pool: In the "Add Recipient" section, type "P AHS E-CONSULT" and press enter. Select the appropriate specialty pool. This will route the message back to the specialty specific E-Consult pool to be reviewed.
- Enter your site name at the top of the note: e.g. CHCN Lifelong



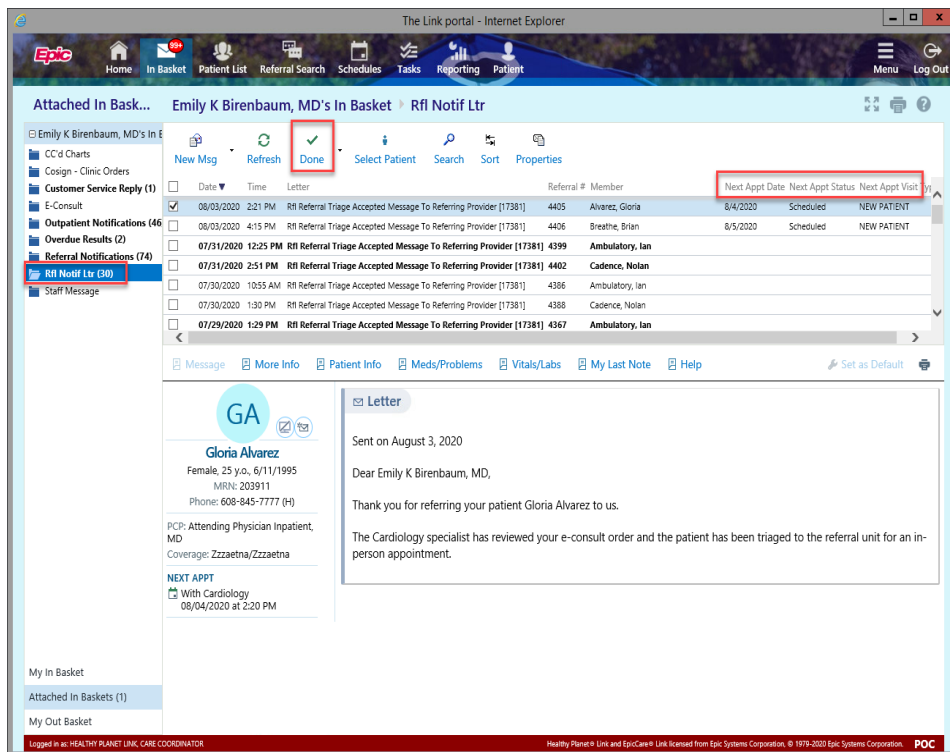
Patients Scheduled will send a letter to the Rfl Notif Ltr In Basket

Patients scheduled will send a letter to the Rfl Notif Ltr In basket folder notifying the initiating physician that the patient will be scheduled.

Select the **Rfl Notif Ltr** folder in **In Basket**

The status of the appointment will appear

When communicated to the provider the message can be marked **Done**.

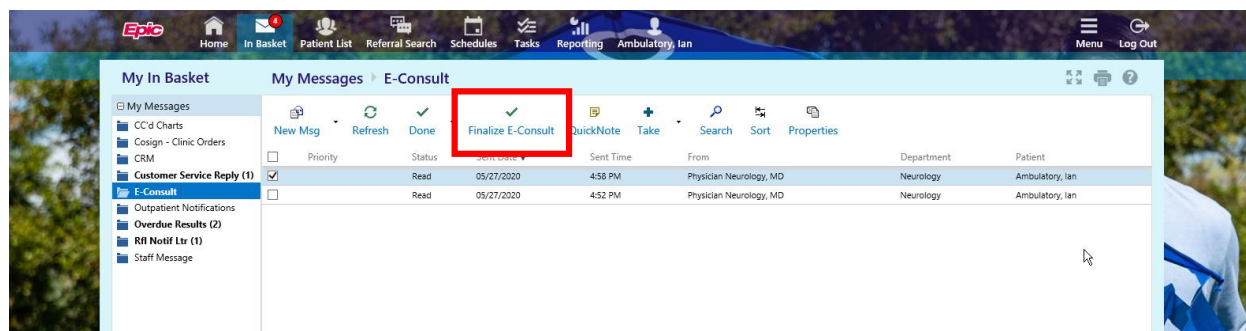


The screenshot shows the Epic In Basket interface for Emily K Birenbaum, MD. The left sidebar shows the 'Rfl Notif Ltr (30)' folder selected. The main area displays a list of messages. The top message is from Gloria Alvarez, MD, dated 08/03/2020 at 2:21 PM. The 'Done' button is highlighted with a red box. The message content is visible on the right, showing a letter from Gloria Alvarez, MD, dated August 3, 2020, regarding a patient referral.

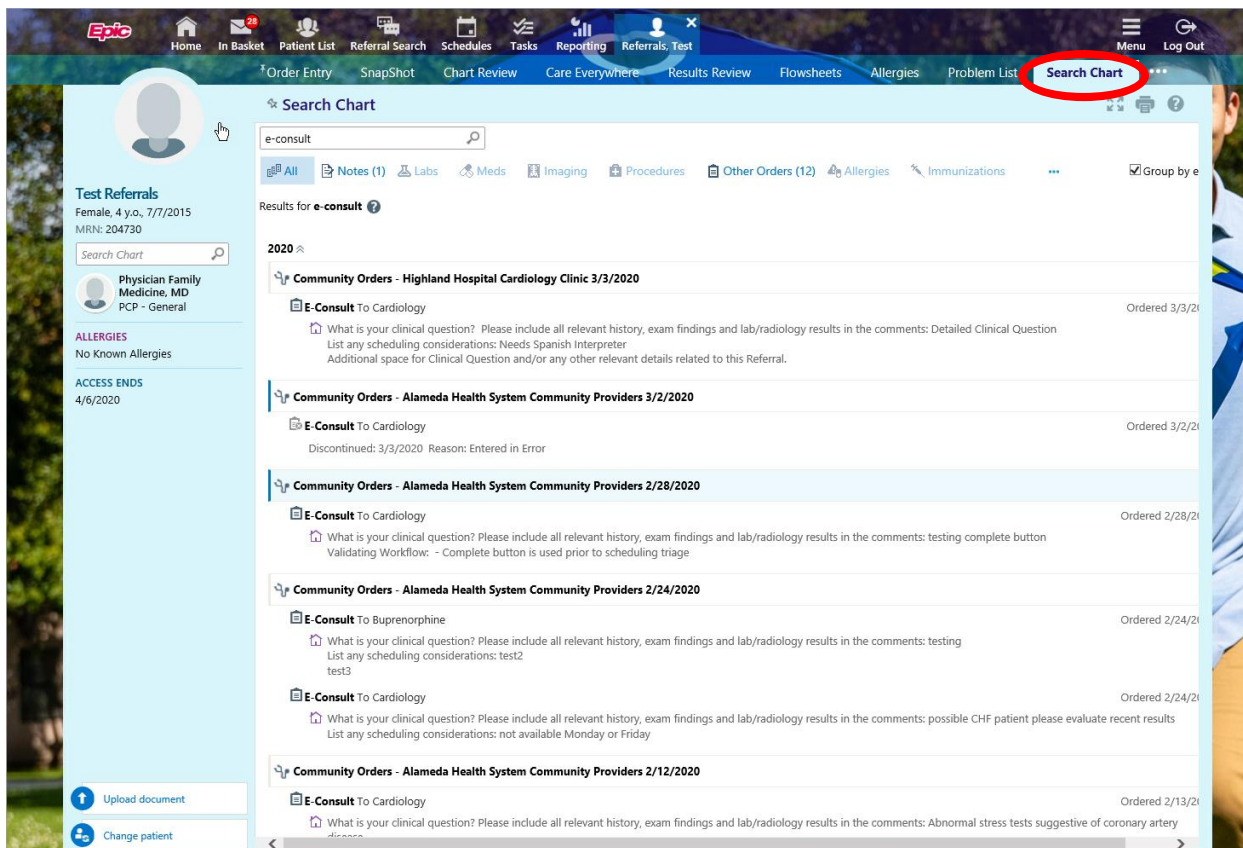
How to Finalize an E-Consult

E-consults can be permanently completed by clicking on the “Finalize E-Consult” button in the In Basket toolbar. We recommend Finalizing E-Consults only after the referring provider’s request for specialty consultation has been fully addressed, the dialogue is complete, and no further recommendations are needed. **E-Consults cannot be re-opened once they are closed. Unresolved E-Consults should remain open in the referring provider’s inbox so that they can be easily routed back to the Reviewing Specialist for additional review and/or scheduling, as needed; examples where this might be relevant are when patients are awaiting diagnostics recommended by a specialist, or when the specialist has recommended a therapeutic trial.**

Click the “Finalize E-Consult” button to Close the E-Consult and drop the E-Consult message out of your In Basket.



The screenshot shows the Epic In Basket interface for My In Basket. The 'E-Consult' folder is selected. The toolbar at the top of the message list includes a 'Finalize E-Consult' button, which is highlighted with a red box. The message list shows two e-consult messages from Physician Neurology, MD, dated 05/27/2020.



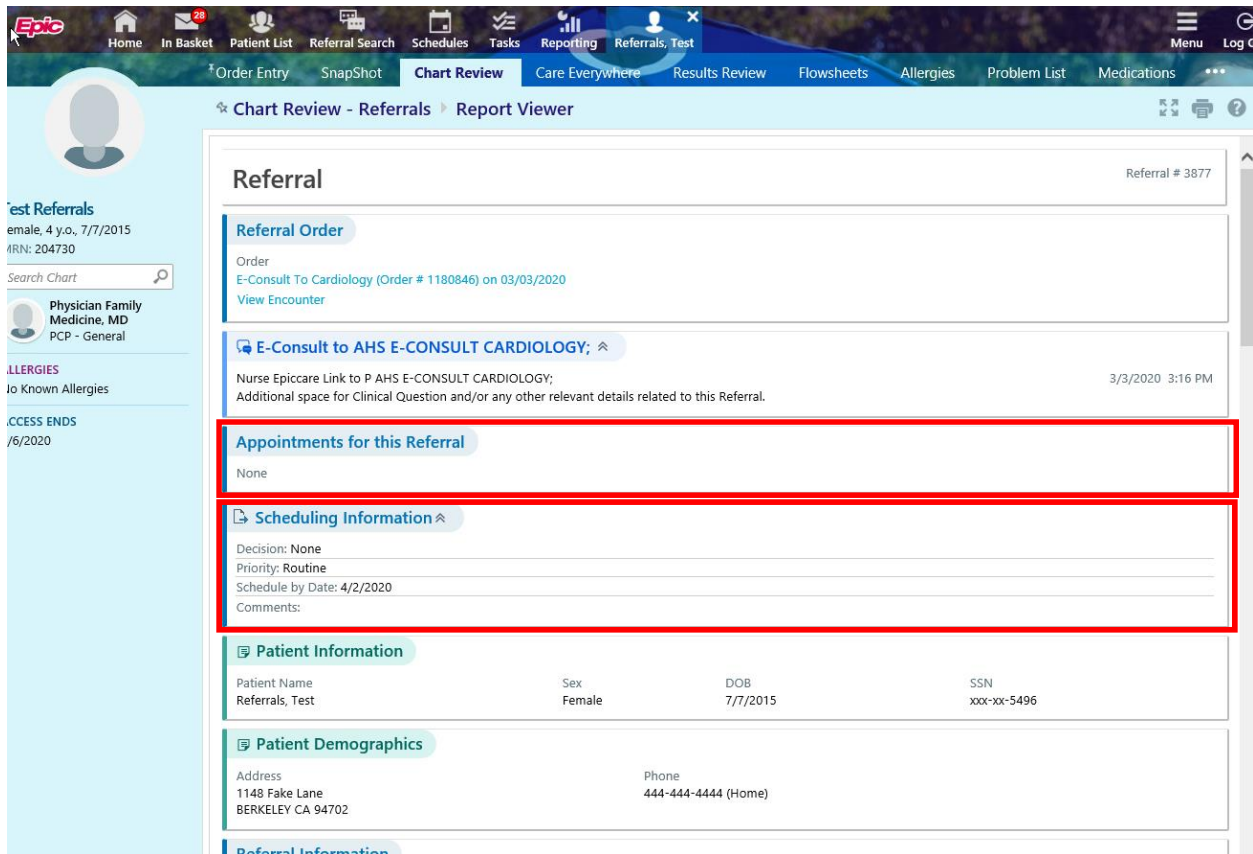
How to track whether an E-Consult has been sent for Scheduling

In the patient's Chart, access the Referral Report to review the following details related to Scheduling:

1. Determine if an E-Consult Referral has been sent for Scheduling
2. Review Scheduling comments by the Specialist Reviewer
3. Verify Appointment Information

Navigate to the Referrals Tab in Chart Review

1. Once in Chart Review, select the E-Consult Referral from the Referrals Tab that you would like to review.
2. Review information within the "Appointments for this Referral" as well as the "Scheduling Information" sections of the Referral report.



Referral Referral # 3877

Referral Order

Order
E-Consult To Cardiology (Order # 1180846) on 03/03/2020
[View Encounter](#)

E-Consult to AHS E-CONSULT CARDIOLOGY; ⌵

Nurse Epiccare Link to P AHS E-CONSULT CARDIOLOGY; 3/3/2020 3:16 PM
Additional space for Clinical Question and/or any other relevant details related to this Referral.

Appointments for this Referral

None

Scheduling Information ⌵

Decision: None
Priority: Routine
Schedule by Date: 4/2/2020
Comments:

Patient Information

Patient Name	Sex	DOB	SSN
Referrals, Test	Female	7/7/2015	xxx-xx-5496

Patient Demographics

Address	Phone
1148 Fake Lane BERKELEY CA 94702	444-444-4444 (Home)

Referral Information

If the Specialist Reviewer has **not taken** action, the following information will be displayed:

- Scheduling Information (Decision) = None
- Appointments for this Referral = None

If the Specialist Reviewer has Accepted the Referral, but an Appointment has **not** been Scheduled, the following information will be displayed:

- Scheduling Information (Decision) = Accept
- Appointments for this Referral = None

If the Specialist Reviewer has Accepted the Referral and an Appointment has been Scheduled, the following information will be displayed:

- Scheduling Information (Decision) = Accept
- Appointments for this Referral = Date/Time, Encounter Department and Encounter Provider

If the Specialist Reviewer has **not** Accepted the Referral, the following information will be displayed:

- Scheduling Information (Decision) = None
- Appointments for this Referral = None