

How to submit an eConsult/ Ambulatory Referral for SFDPH CareLink Users

Terminology:

- **eConsult:** 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
- **Ambulatory referral:** some San Francisco Health Network services do not have clinician reviewers and requests go straight to scheduling. For those services, it will be called “ambulatory referral”. Patients are scheduled on a first come, first serve basis.
- **Ambulatory referral to XXX (ED/ Inpatient):** these referrals are meant to be used by ED/ Inpatient providers. These consults may be sent directly for scheduling or reviewed by a specialist clinician. Specialty services chose their preferred workflows.
- **External (non-DPH) Referral to XXXX:** this is what referrals are called if they are sent to an outside, non-San Francisco Health Network entity for services that are not available within SFHN or when a second opinion is needed.

Who can submit:

- Clinical Support Staff (ex. RN, MA, SW, etc.)
- Clinician (ex. MD, NP, PA)
- Clinic Coordinator
- DPH User (Staff, Providers at non-DPH sites)
- Support staff and clinical coordinators can submit on behalf of any independent clinician: (ex. MD, NP, PA). This clinician is considered the authorizing provider for the eConsult/Ambulatory Referral order.

Notifications about consults/ referrals

- There will not be any email notifications about eConsult/ Ambulatory Referral activity
- Referring providers will receive InBasket notifications in 2 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 scheduled for an in-person visit/appointment

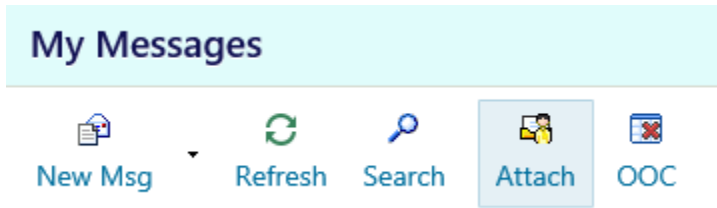
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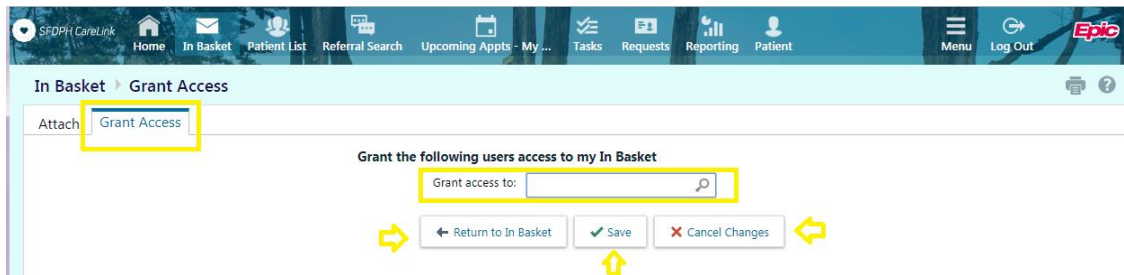
How to attach clinic support staff to an In-Basket

Clinic coordinators have the option to attach to providers' Inboxes to view results, eConsult responses, and notifications. This is a one-time requirement.

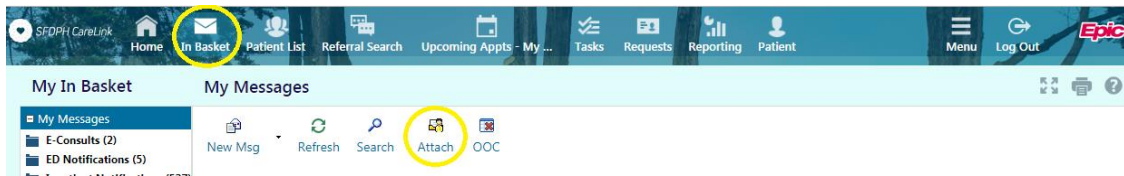
- The authorizing provider logs into CareLink, navigates to In Basket, and selects "Attach."



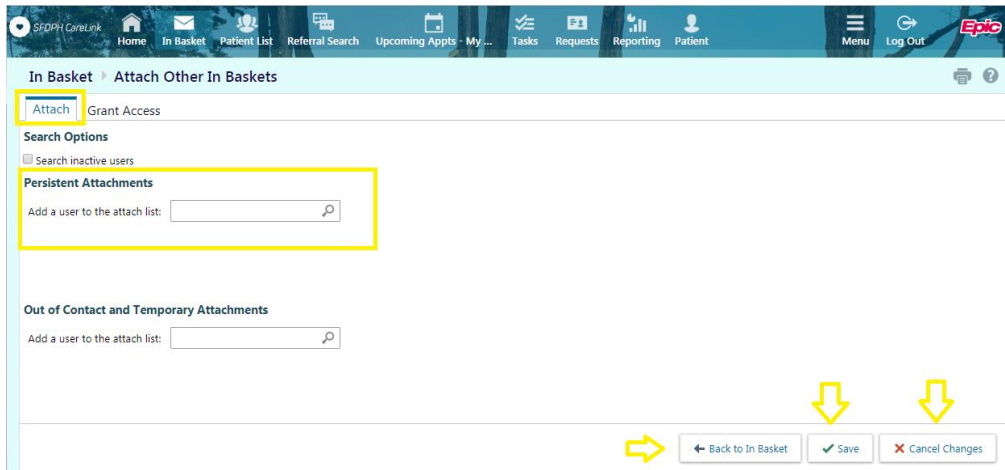
- The provider switches to the "Grant Access" tab, and enters the referral coordinator's name.



- The referral coordinator logs into CareLink, navigates to the "In Basket" tab and selects "Attach."



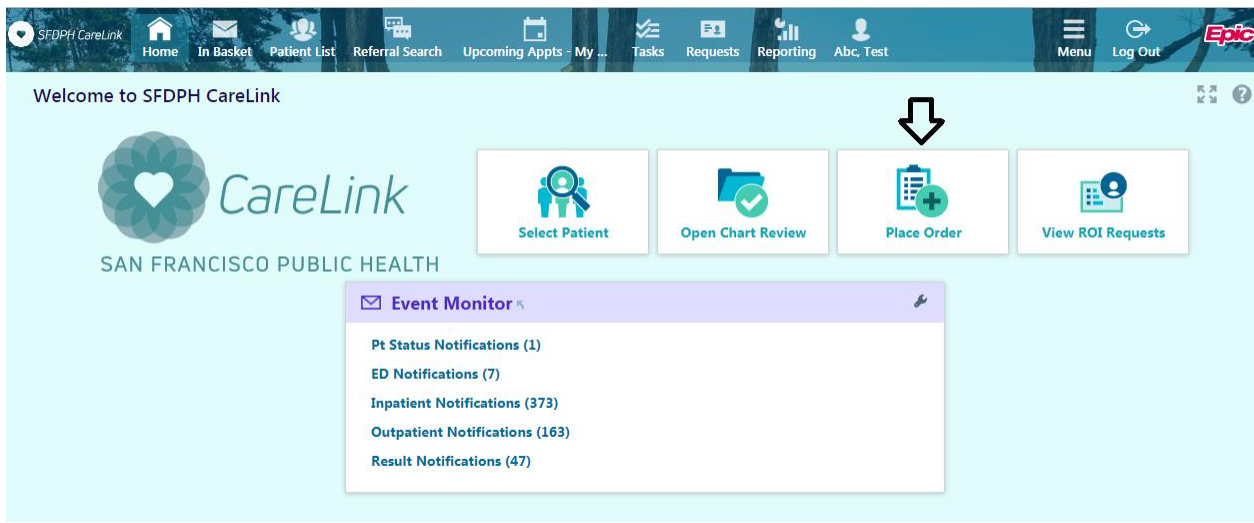
- On the "Attach" tab, the coordinator selects the physician(s) In Baskets to attach to



How to submit an eConsult/Ambulatory Referral

Step 1: Login into the SFDPH Carelink system (refer to QuickStart Guide for additional guidance).

Step 2: Click on “Place Order” to place any type of order, including a diagnostic, eConsult or Ambulatory Referral order (See screenshot below).



If you cannot find the patient because he/she has not yet had contact with the SFDPH system, you must create a new patient chart. Please refer to the “Patient Creation” section of the QuickStart guide. Clinic coordinators from non-DPH clinics have the ability to create new patient charts.

Step 3: Open a patient chart. You can search your patient list using the toolbar near the top of the screen or can search among all patients who have had contact with the SFDPH system previously (see screenshot below).

Step 4: Select a referring clinic and authorizing provider

Confirm the name of the referring clinic. Note that “Select Ordering Clinic” is defaulted for the individual who has logged into SFDPH CareLink.

Once a referring clinic is selected in the Order Entry activity, a list of providers will appear that includes all authorizing providers at that clinic. Choose the appropriate authorizing provider for the eConsult/Ambulatory Referral and click “Accept” (see screenshot below). You have the option to type the last name of the provider or scroll through the list of authorized providers.

If a provider is not on the list, please alert the clinic manager, who is responsible for keeping the clinic/department’s setup up to date.

Step 5: Order Entry

To place a new eConsult/Ambulatory Referral, use the new Procedure lookup tool. Type in the name of the specialty service to which you are submitting a consult and then select the consult of choice (See below for step-by-step screenshots). Note that the search function is quite robust and includes eConsult/Ambulatory Referral names as well as common synonyms. For example if you type Renal or Nephrology, all available orders associated with Nephrology will appear.

SFDPH CareLink Home In Basket Patient List Referral Search Upcoming Appts - My ... Tasks Requests Reporting Abc, Test Menu Log Out Epic

Order Entry

Preference List Dx Association

New procedure: **To place a new order** Cupid, Invasive Cardiologist, MD - EHS Link Group

Unsigned new orders (2)

- E-Referral to Pediatric Cardiology
- E-Consult to Pediatric Asthma/Allergy

Orders signed in this encounter (1)

- E-Consult to ZSFG Cardiology
Scheduling needed. Routine, Internal Referral

Upload document

Change patient

Sign Orders

Example: Nephrology

Please make a selection

Procedure:

My Preference List Matches:

Name	Type	Pref List	Resulting Agencies	Cost to Org	Phase of Care
E-Consult to Laguna Honda Nephrology	E-Consult	EPICCARE LINK ORDERS			
E-Consult to ZSFG Nephrology	E-Consult	EPICCARE LINK ORDERS			
Ambulatory referral to ZSFG Nephrology (ED / Inpatient Follow-up)	E-Consult	EPICCARE LINK ORDERS			

3 records total, all records loaded.

Step 6: Answer all applicable questions. Questions with an exclamation point to their left are required. (See screenshot below)


Attachments: Lab results and/ Radiology results should be attached to consults from your native health record system. Note: The maximum file size is 20 megabytes. The following file types can be uploaded:

- PDF
- JPG/JPEG
- TIF/TIFF
- PNG
- DOC
- TXT
- HTM/HTML
- WAV
- MPG


Class: This is automatically defaulted to “Internal Referral”. DO NOT change this field.


Step 7: Print out clinic-specific policy pages for the patient, available on the Carelink Homepage under the “Quicklinks” section (see screenshot below). Policy pages include clinic information, specialist reviewer contact information and recommendations for common consultation requests.


Welcome to SFDPH CareLink




SAN FRANCISCO PUBLIC HEALTH


Select Patient


Open Chart Review


Place Order


View Dashboards

✉ **Event Monitor**

Inpatient Notifications (1)

Outpatient Notifications (3)

Referral Notifications (1)

★ **Quick Links**

Quick Start Guide

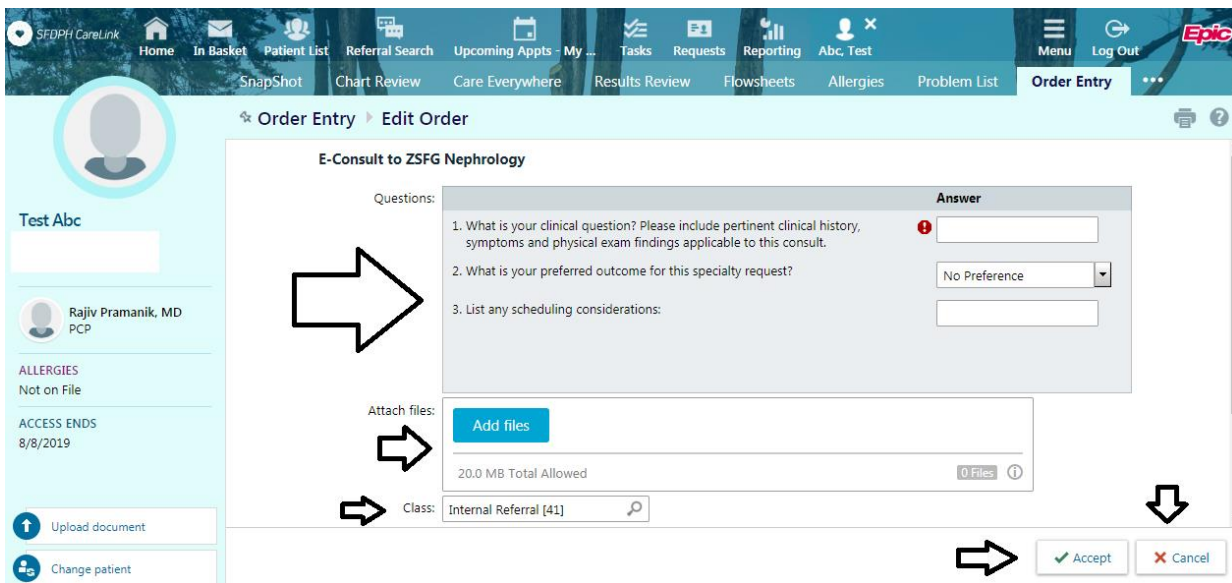
Two-Factor Authentication

How to Take Telederm Pictures

How to Submit an eConsult-eReferral for SFDPH CareLink Users

Test

Once the eConsult/Ambulatory Referral questions are completed, attachments uploaded and educational pdf printed as appropriate, click “Accept” on bottom right of screen (see below). You may also cancel the order.



E-Consult to ZSFG Nephrology

Questions:	Answer
1. What is your clinical question? Please include pertinent clinical history, symptoms and physical exam findings applicable to this consult.	<input type="text"/>
2. What is your preferred outcome for this specialty request?	No Preference
3. List any scheduling considerations:	<input type="text"/>

Attach files: 20.0 MB Total Allowed 0 Files

Class: Internal Referral [41]

Step 8: Select an ICD10 code.


This will prompt you to enter an appropriate ICD 10 code. Quick Picks are patient-specific codes that are already attached to the patient’s chart/problem list. If the quick picks do not apply to the consult/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. For example, in the screenshots below, the search term is “hyperkalemia”.

Dx association: **Quick Picks**

Pain R52

Add a new diagnosis:

Please make a selection

hyperkalemia 

Search Matches:

%	ID	Name	ICD-10 Codes
99.9%	172194	Hyperkalemia	E87.5
88.8%	1833958	Hyperkalemia of newborn	P74.31
88.8%	1006822	Hyperkalemia, diminished renal excretion	E87.5
88.8%	172204	Hyperkalemia, transcellular shifts	E87.5
77.7%	172200	Acute hyperkalemia	E87.5
77.7%	172201	Chronic hyperkalemia	E87.5
77.7%	1286747	Drug-induced hyperkalemia	E87.5, T50.905A
77.7%	173525	Familial hyperkalemic periodic paralysis	G72.3

19 records total, all records loaded.

Click "Accept" on the bottom right hand side of the screen. You will then be directed back to the Order Entry screen to sign the order.

Step 9: Sign the eConsult/Ambulatory Referral order (see screenshot below)

SFDPH CareLink Home In Basket Patient List Referral Search Upcoming Appts - My... Tasks Requests Reporting Abc, Test Menu Log Out

SnapShot Chart Review Care Everywhere Results Review Flowsheets Allergies Problem List **Order Entry**

Order Entry

Preference List Dx Association

New procedure:

Cupid, Invasive Cardiologist, MD - EHS Link Group

Unsigned new orders (1)


E-Consult to ZSFG Endocrinology

Are you referring this patient for evaluation and/or management of diabetes? (If yes, submit consult to Diabetes Services instead.): No
What is your clinical question? Please include pertinent clinical history, symptoms and physical exam findings applicable to this consult. testing system
What is your preferred outcome for this specialty request? In-person
List any scheduling considerations: 3 weeks

Orders signed in this encounter (1)

E-Consult to ZSFG Nephrology

Scheduling needed. Routine, Internal Referral

 **Please disregard status**

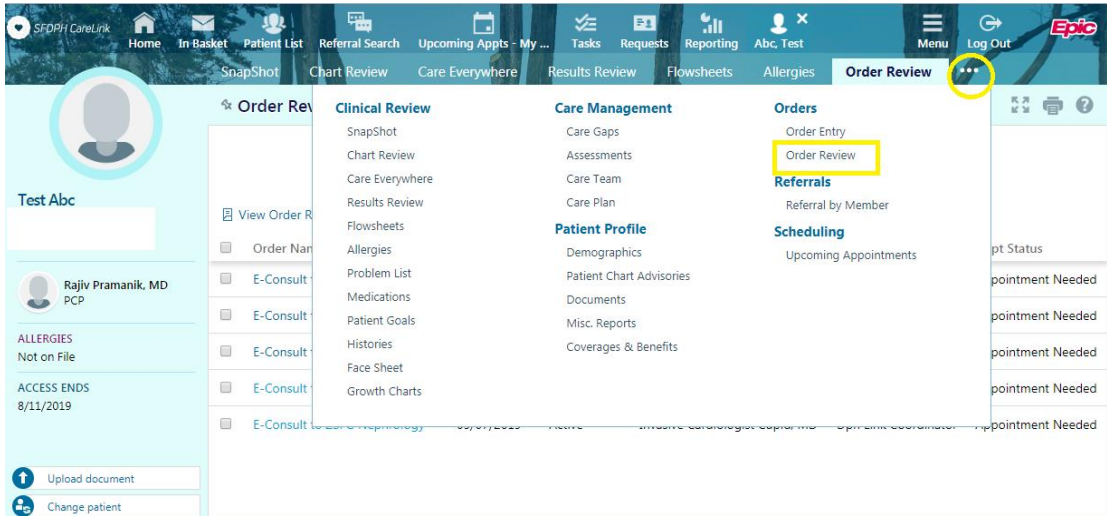
After signing the order, you will be directed back to the Order Entry screen. The order will now appear under "Orders signed in this encounter". Please disregard the scheduling comments below the documentation that the order has been signed during this encounter.

On this screen, you can also view all unsigned "draft" orders specific to the user who is logged into SFDPH CareLink (i.e. clinic coordinator). This list includes both unsigned eConsult/ Ambulatory Referral and unsigned radiology orders. (See screenshot below). If appropriate, take this opportunity to complete those draft orders.

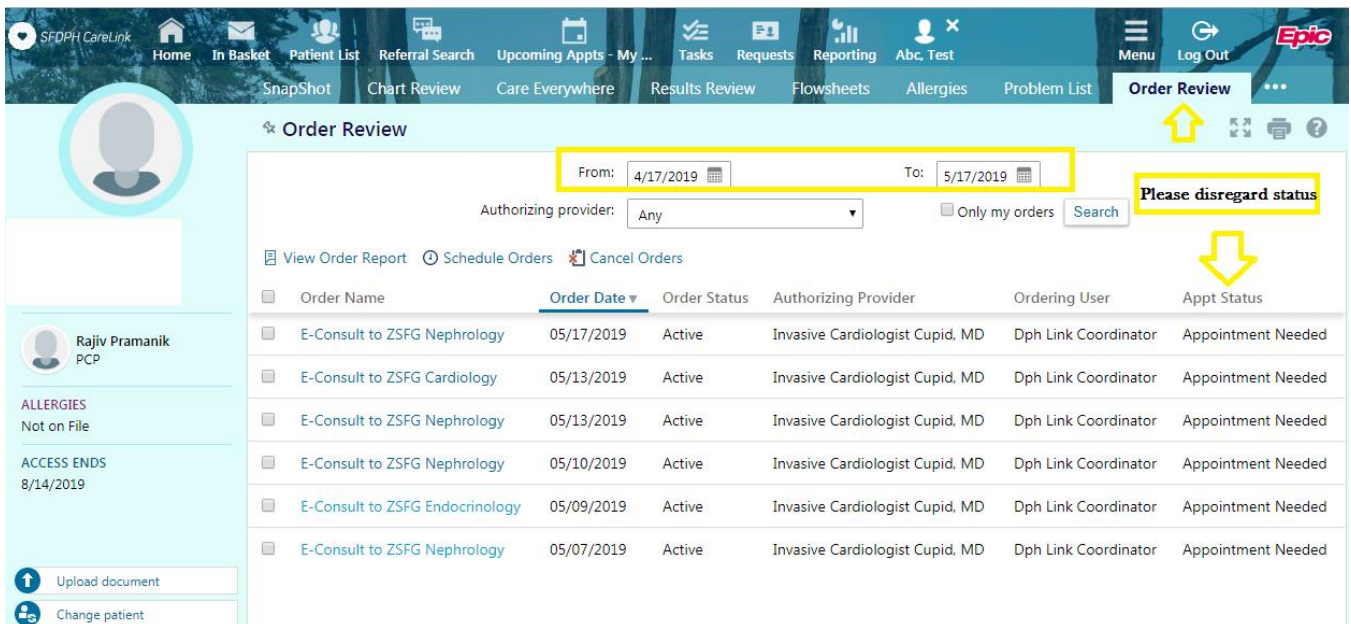
The screenshot displays the Epic Order Entry interface. The top navigation bar includes options like Home, In Basket, Patient List, Referral Search, Upcoming Appts, Tasks, Requests, Reporting, and Log Out. The main content area is titled "Order Entry" and shows a "New procedure" search field. Below this, there are two sections: "Unsigned new orders (2)" and "Orders signed in this encounter (1)". The "Unsigned new orders" section contains two items: "E-Referral to Pediatric Cardiology" and "E-Consult to Pediatric Asthma/Allergy". A red box highlights the text "Unsigned 'draft' orders" next to these items, and a white arrow points to the "E-Referral to Pediatric Cardiology" entry. The "Orders signed in this encounter" section contains one item: "E-Consult to ZSFG Cardiology" with the note "Scheduling needed. Routine, Internal Referral". A "Sign Orders" button is visible at the bottom right of the interface.

How to view all prior patient consult/ referral and diagnostic orders

In a patient's chart, click "Order Review" located under the tab with three white dots (referring to additional options). See screenshot below.



This brings you to the Order Review page for this specific patient. You can view all prior orders placed for this patient in the last month. Click on the Order Name to view eConsult/ Ambulatory Referral details. If you need to view a consult older than a month, you can update the date parameters. You can also filter by authorizing provider. Please disregard the Appointment status on the far-right column, as these data are erroneous. Details about a patient's scheduling status will be communicated via an In Basket message to the authorizing provider.



To see details of that eConsult/Ambulatory Referral, select the order of choice. You will see the answers to the order questions.

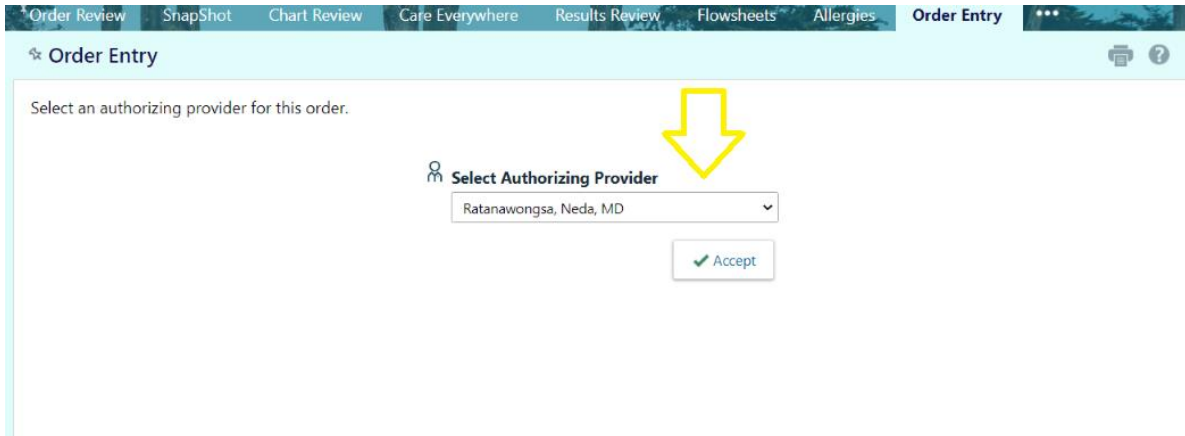
The screenshot shows the 'Order Review' section of the Epic interface. A yellow box highlights the 'E-Consult to Dph Link Coordinator' section. Below this, there is a table of 'Order Questions'.

Question	Answer	Comment
Clinical question:	Test	
Preferred outcome:	No Preference	
Scheduling considerations:	2 weeks	

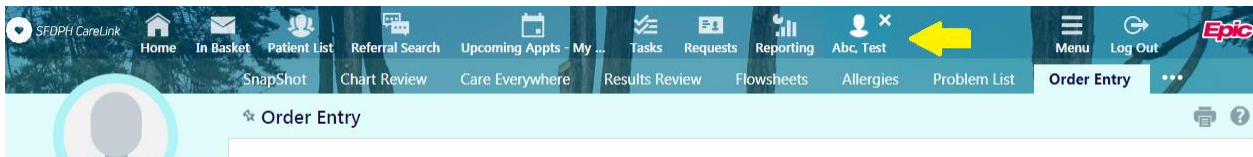
To submit additional orders for the same patient click "Order Entry".

The screenshot shows the 'Order Entry' menu in the Epic interface. The 'Order Entry' option is highlighted with a yellow box. The menu is organized into several categories:

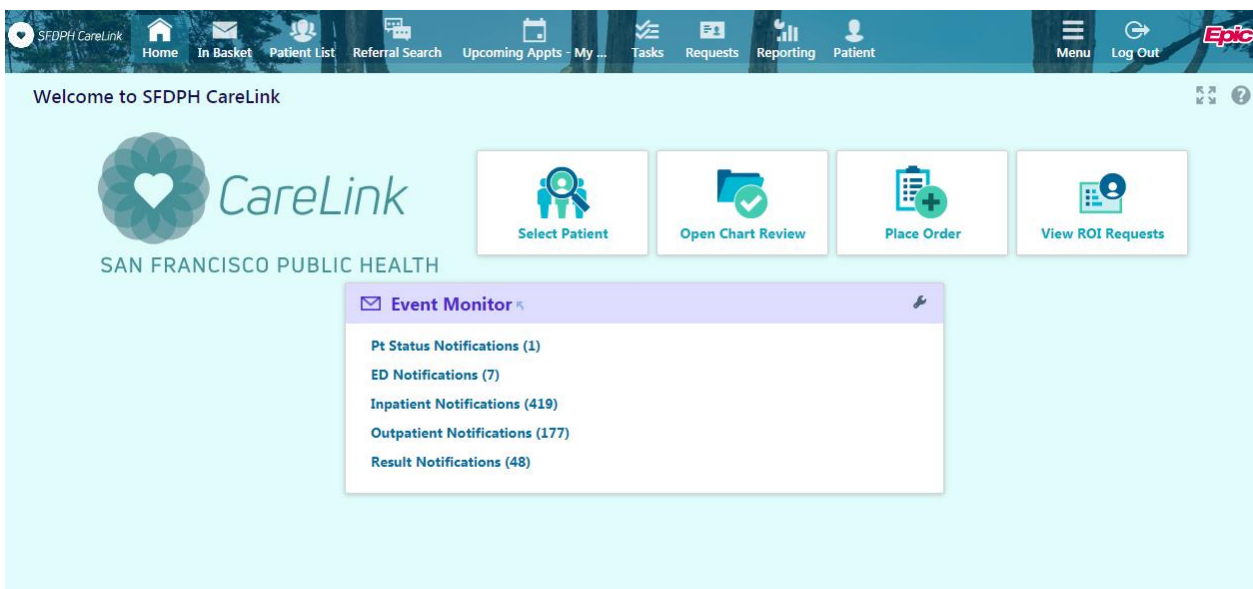
- Clinical Review**: Snapshot, Chart Review, Care Everywhere, Results Review, Flowsheets, Allergies, Problem List, Medications, Patient Goals, Histories, Face Sheet, Growth Charts
- Care Management**: Care Gaps, Assessments, Care Team, Care Plan
- Patient Profile**: Demographics, Patient Chart Advisories, Documents, Misc. Reports, Coverages & Benefits
- Orders**: Order Entry (highlighted), Order Review
- Referrals**: Referral by Member
- Scheduling**: Upcoming Appointments



To submit an eConsult/ Ambulatory Referral for a different patient click the X located next to the patients name (see screenshot below).



You will then be re-directed to the main SFDPH CareLink homepage where you can select "Place Order" to place an eConsult/Ambulatory Referral for a different patient.

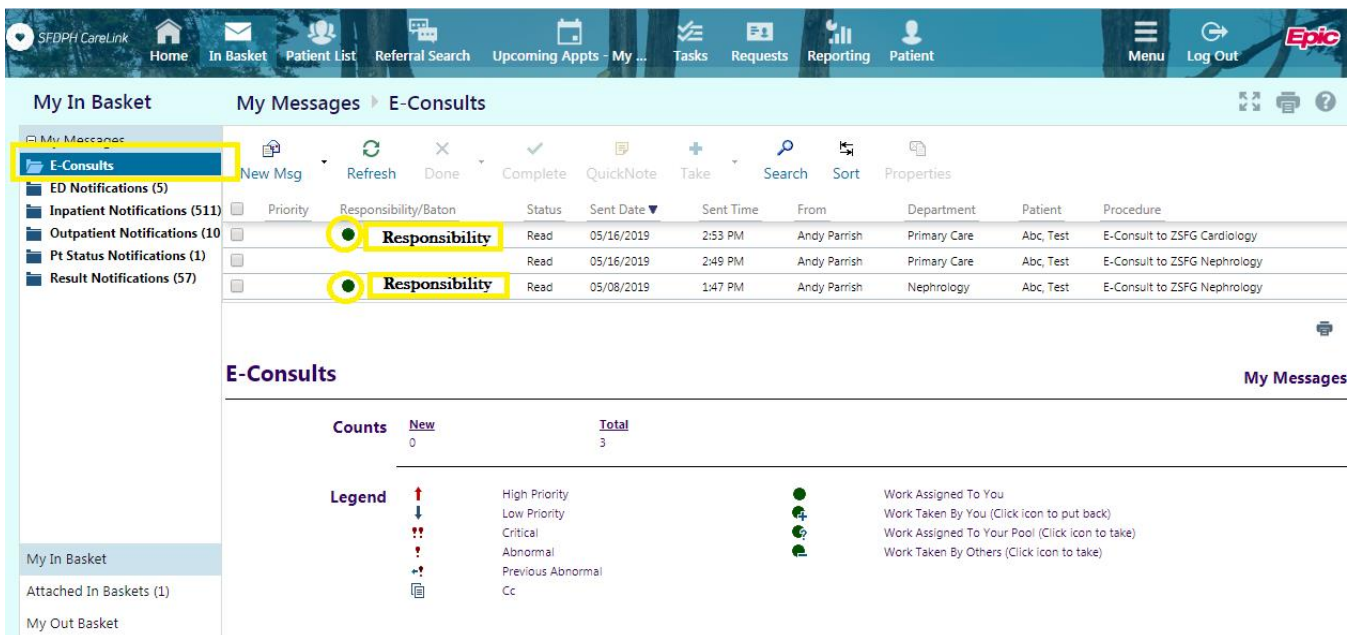


How to view In-Basket responses




An eConsult folder will appear once a Specialist Reviewer responds to an eConsult. Each row in the eConsult Inbasket folder represents a unique eConsult encounter. It identifies on who is responsible for next steps, specialist response date/time, specialist name and to whom the eConsult was submitted (See screenshot below).

Responsibility for the consult is denoted by the “responsibility ball” in the second column of this queue. The presence of a responsibility ball indicates that the provider whose Inbasket is being viewed is the person who is responsible for next steps. If the “responsibility ball” is missing, then the response is an FYI from the Specialist Reviewer. The Specialist has sent the same response to a different clinician (likely a different specialist) who has the responsibility to respond.

- Brand new dialogue is listed as “New” and is bolded.
- The presence of a green ball icon denotes that you are responsible for taking action on the eConsult dialogue.













The screenshot shows the Epic E-Consults interface. The top navigation bar includes Home, In Basket, Patient List, Referral Search, Upcoming Appts, Tasks, Requests, Reporting, Patient, Menu, and Log Out. The main content area is titled "My In Basket" and "My Messages > E-Consults". A table lists e-consults with columns for Priority, Responsibility/Baton, Status, Sent Date, Sent Time, From, Department, Patient, and Procedure. Three rows are visible, each with a green responsibility ball icon in the Responsibility/Baton column. The word "Responsibility" is highlighted in yellow in the second column of each row. Below the table, there is a section for "E-Consults" with a "Counts" table and a "Legend" section.

Priority	Responsibility/Baton	Status	Sent Date	Sent Time	From	Department	Patient	Procedure
	 Responsibility	Read	05/16/2019	2:53 PM	Andy Parrish	Primary Care	Abc, Test	E-Consult to ZSFG Cardiology
	 Responsibility	Read	05/16/2019	2:49 PM	Andy Parrish	Primary Care	Abc, Test	E-Consult to ZSFG Nephrology
	 Responsibility	Read	05/08/2019	1:47 PM	Andy Parrish	Nephrology	Abc, Test	E-Consult to ZSFG Nephrology

Counts	New	Total
	0	3

Legend

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

Click a consult to review Specialist Reviewer’s response

- The “Scheduling Information” section includes information about scheduling status. “Decision: Accept” means that the consult has been sent to a scheduling work queue. “Decision: None” means that the consult has NOT been sent for scheduling.
- The “Appointments for this order” section includes information about the patient’s appointment. If an appointment has been made the date & time will appear. If an appointment has not yet been made the following will appear- No orders to display.
- The “Message” section includes all back-and-forth dialogue between the referring provider and the specialist reviewer.
- The “Order Questions” section includes the original eConsult questions and answers to any questions that were included on the original submission form.
- The “tips on how to reply to an eConsult” section is at the bottom of the screen.

The screenshot shows the Epic E-Consults interface. At the top, there's a navigation bar with options like Home, In Basket, Patient List, Referral Search, Upcoming Appts, Dashboards, and Patient. Below this, the 'My In Basket' section is active, showing a list of messages. One message is highlighted as 'New' with a status of 'New' and a date of 10/02/2019. Below the list, there are tabs for 'Message', 'Visit Summary', 'Patient Info', 'Meds/Problems', 'Vitals/Labs', and 'My Last Note'. The 'Message' tab is selected, showing a detailed view of an eConsult. The 'Scheduling Information' section is highlighted in yellow, showing 'Decision: None', 'Priority:', 'Schedule by Date:', and 'Comments:'. Below this, the 'Appointments for this Order' section is also highlighted in yellow, showing 'No orders to display.'

Message
Physician Epiccare Link, MD to P TUBERCULOSIS CLINIC E-CONSULT 10/30/2019 8:10 PM

Order Questions

Question	Answer	Comment
Is this patient from an SFHN primary care clinic?	Yes	
Criteria	Yes	
Brief clinical question / indication:	n	
Preferred outcome:	No Preference	

It is helpful to review the patient’s chart before determining which action to take. You can view selected components of the patient chart relatively easily, using the In Basket buttons.

These buttons include:

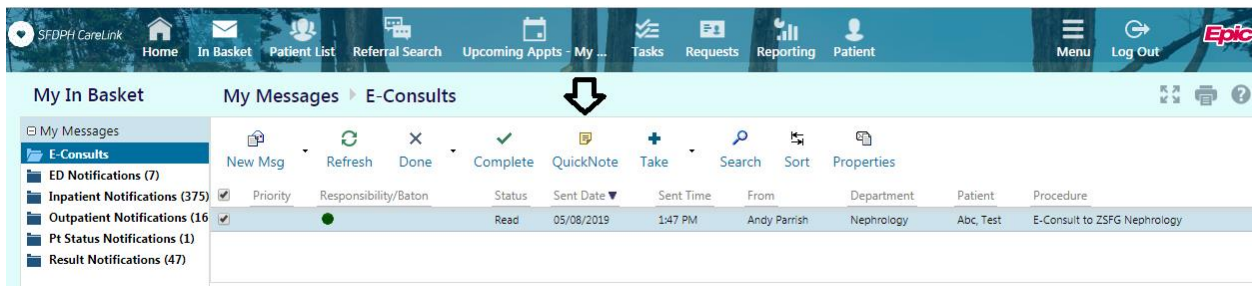
- Visit summary: Information about the clinic visit when the eConsult was generated
- Patient info: recent outpatient visits and care team information
- Meds/Problems: active medications, problems and allergies
- Vitals/Labs: most recent vitals and lab results

How to respond to a specialist reviewer

Step 1: Click QuickNote (see below)

Note that the response from the Specialist Reviewer will not appear after you select Quick Note.

Recommendation: Copy and paste Specialist response into the Quick Note response box. We also recommend that you delete the text that you copied/pasted before completing your consultative response. Otherwise, this will be listed twice for the specialist reviewer.



The screenshot shows the Epic E-Consults interface. The top navigation bar includes Home, In Basket, Patient List, Referral Search, Upcoming Appts, My Messages, Tasks, Requests, Reporting, and Patient. The main content area is titled 'My Messages > E-Consults'. A left sidebar shows a tree view of message categories: My Messages, E-Consults, ED Notifications (7), Inpatient Notifications (375), Outpatient Notifications (16), Pt Status Notifications (1), and Result Notifications (47). The main area displays a table of messages with columns for Priority, Responsibility/Baton, Status, Sent Date, Sent Time, From, Department, Patient, and Procedure. A 'QuickNote' button is highlighted with a downward arrow.

Priority	Responsibility/Baton	Status	Sent Date	Sent Time	From	Department	Patient	Procedure
✓		Read	05/08/2019	1:47 PM	Andy Parrish	Nephrology	Abc, Test	E-Consult to ZSFG Nephrology

Quick Note

Patient name: SUMNER, ELIZABETH
Visit date: 2/18/2019

Sensitive

Note: this mock-up is subject to visual changes.

Add Recipient

Recipient:

Sender: ANDERSON, STEVEN [9970]

Priority:

High
 Routine
 Low

Recipient List

Forward Notes to:

Responsibility will be sent to: ANDERSON, STEVEN [9970]

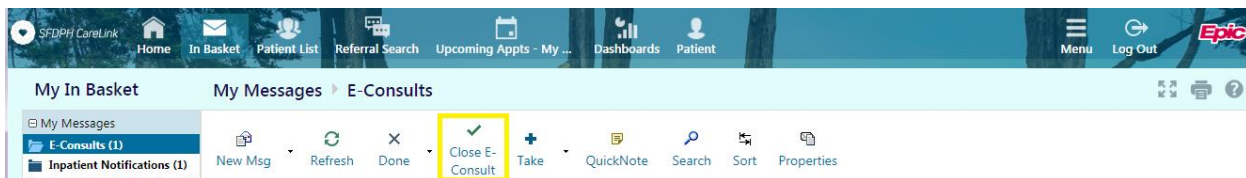
Step 2: Add response

Step 3: Manually add the eConsult pool. In the “Add recipient” section, add “P e-consult pool” to route the consult/ referral to the Specialty pool to be reviewed.

How to close an eConsult

Close the encounter using the “Close E-Consult” button (see below). We recommend closing eConsults when the dialogue is complete and no further recommendations are needed. However, remember that eConsults cannot be re-opened once they are closed. This is why we recommend keeping unresolved consults open so that they can be easily routed back to Reviewing Specialist for review and/or scheduling as needed. Note that all eConsults can be found within a patient’s chart.

Click the “Close E-Consult” button to close the consult and the consult will drop out of your In Basket.



Searching patient charts for old eConsults/Ambulatory Referrals

The best way to find a closed eConsult (or an open eConsult for which you are waiting for a specialist response) is to navigate to Chart Review and the Encounters tab. You can then use the Chart Search feature (See screenshot below).

The screenshot displays the Epic EHR interface. At the top, the navigation bar includes options like Home, In Basket, Patient List, Referral Search, Upcoming Appts - My..., Tasks, Requests, Reporting, Abc. Test, Menu, and Log Out. The main content area is titled 'Chart Review' and shows a search bar with the text 'Search Chart'. Below the search bar, there are tabs for Encounters, Notes, Labs, Meds, Imaging, Card Enc, Procedures, Media, Letters, Referrals, and Episodes. The 'Encounters' tab is selected, and a table of 'Recent Visits' is displayed. The table has columns for 'When', 'Type', 'With', and 'Description'. The data rows show various e-Consults and an admission.

When	Type	With	Description
05/13/2019	E-Consult Community Order	Fam Med	
05/13/2019	E-Consult Community Order	Fam Med	
05/10/2019	E-Consult Community Order	Fam Med	
05/09/2019	E-Consult Community Order	Fam Med	
05/08/2019	E-Consult	Nephrology - Parrish, A	Pain (Primary Dx)
05/07/2019	E-Consult Community Order	Fam Med	
05/02/2019	Admission (Current)	Surgery, P	

How to track whether an eConsult has been sent for scheduling

In the patient’s chart there are two sections where you can view

1. If a consult has been sent for scheduling
2. Scheduling comments by the Specialist Reviewer
3. If an appointment has been made

Under the “Referrals” tab

1. Under “chart review” click the consult/ referral you would like to view:

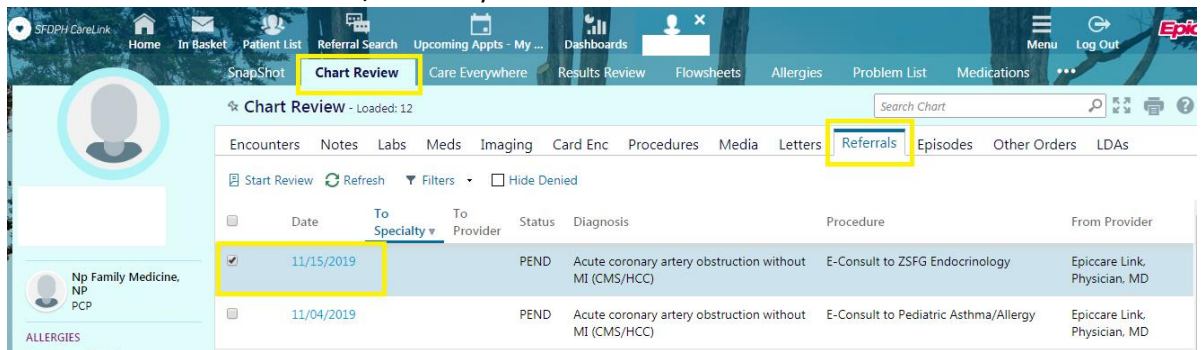


Chart Review - Loaded: 12

Encounters Notes Labs Meds Imaging Card Enc Procedures Media Letters **Referrals** Episodes Other Orders LDAs

Date	To Specialty	To Provider	Status	Diagnosis	Procedure	From Provider
11/15/2019			PEND	Acute coronary artery obstruction without MI (CMS/HCC)	E-Consult to ZSFG Endocrinology	Epiccare Link, Physician, MD
11/04/2019			PEND	Acute coronary artery obstruction without MI (CMS/HCC)	E-Consult to Pediatric Asthma/Allergy	Epiccare Link, Physician, MD

- a.
2. Scroll to the bottom and click “E-Consult to XXX”

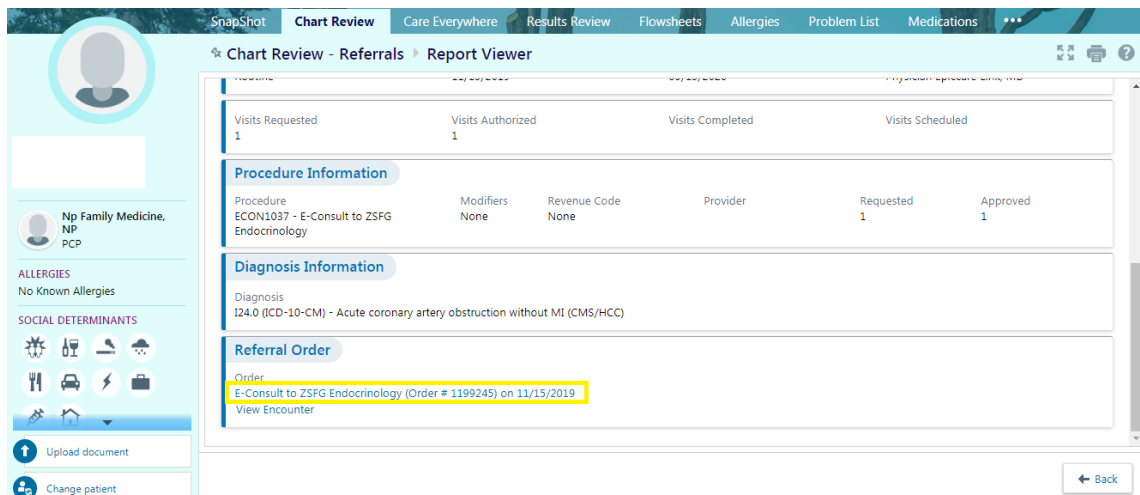


Chart Review - Referrals Report Viewer

Visits Requested: 1, Visits Authorized: 1, Visits Completed: 1, Visits Scheduled: 1

Procedure Information

Procedure	Modifiers	Revenue Code	Provider	Requested	Approved
ECON1037 - E-Consult to ZSFG Endocrinology	None	None		1	1

Diagnosis Information

Diagnosis: I24.0 (ICD-10-CM) - Acute coronary artery obstruction without MI (CMS/HCC)

Referral Order

Order: **E-Consult to ZSFG Endocrinology (Order # 1199245) on 11/15/2019**

View Encounter

If an appointment has been made the scheduling decision will be listed as “Accept” and the date/time of the appointments will be listed.



The screenshot shows a web browser window with three main sections highlighted by yellow boxes. The first section, titled "Appointments for this Order", contains the text "The following appointment has been made for this order:" followed by a table with one row: "12/13/2019 3:20 PM - 20 min Floria Chi, MD Dph Pc Medical Maxine Hall Hc". The second section, titled "Scheduling Information", lists "Decision: Accept", "Priority: Routine", "Schedule by Date: 12/14/2019", and "Comments:". The third section is titled "E-Consult to".

If an appointment has not yet been made but has been sent to scheduling by the specialist reviewer, the scheduling decision will be listed as “Accept” and any scheduling comments made by the specialist reviewer will be available. There will be no appointments information yet.

If the consult/ referral has not yet been sent for scheduling the “Appointments for this Order” will display- No orders to display and the “Scheduling Information” section will display- Decision: None.

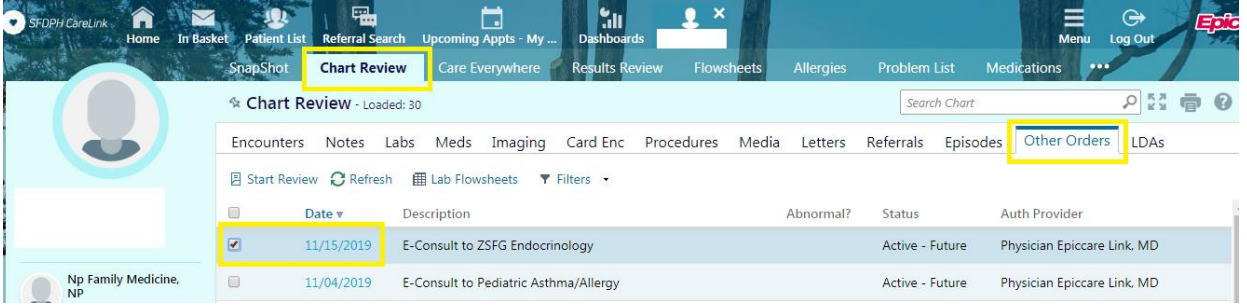


The screenshot shows a web browser window with three main sections highlighted by yellow boxes. The first section, titled "Appointments for this Order", contains the text "No orders to display.". The second section, titled "Scheduling Information", lists "Decision: None", "Priority: Routine", "Schedule by Date:", and "Comments:". The third section is titled "E-Consult to".

Under the “Other Orders” Tab

If an appointment has been made the scheduling decision will be listed as “Accept” and the date/time of the appointments will be listed.

- Under “chart review” click the consult/ referral you would like to view:

a. 

Date	Description	Abnormal?	Status	Auth Provider
11/15/2019	E-Consult to ZSFG Endocrinology		Active - Future	Physician Epiccare Link, MD
11/04/2019	E-Consult to Pediatric Asthma/Allergy		Active - Future	Physician Epiccare Link, MD

If an appointment has been made the scheduling decision will be listed as “Accept” and the date/time of the appointments will be listed.



Appointments for this Order

The following appointment has been made for this order:
 12/13/2019 3:20 PM - 20 min Floria Chi, MD Dph Pc Medical Maxine Hall Hc

Scheduling Information

Decision: **Accept**
 Priority: **Routine**
 Schedule by Date: 12/14/2019
 Comments:

If an appointment has not yet been made but has been sent to scheduling by the specialist reviewer, the scheduling decision will be listed as “Accept” and any scheduling comments made by the specialist reviewer will be available. There will be no appointments information yet.

If the consult/ referral has not yet been sent for scheduling the “Appointments for this Order will display- No orders to display and the “Scheduling Information” section will display- Decision: None.

Appointments for this Order

No orders to display.

Scheduling Information ^

Decision: None
Priority: Routine
Schedule by Date:
Comments:

E-Consult to ^