Placing an Epic referral to Hillsboro Medical Center Cardiovascular Clinic

Physicians can refer patients to an outpatient specialty service through a consult order. Consult orders can be placed within scheduled visits or other encounters (e.g., orders only, documentation, telephone, etc.).
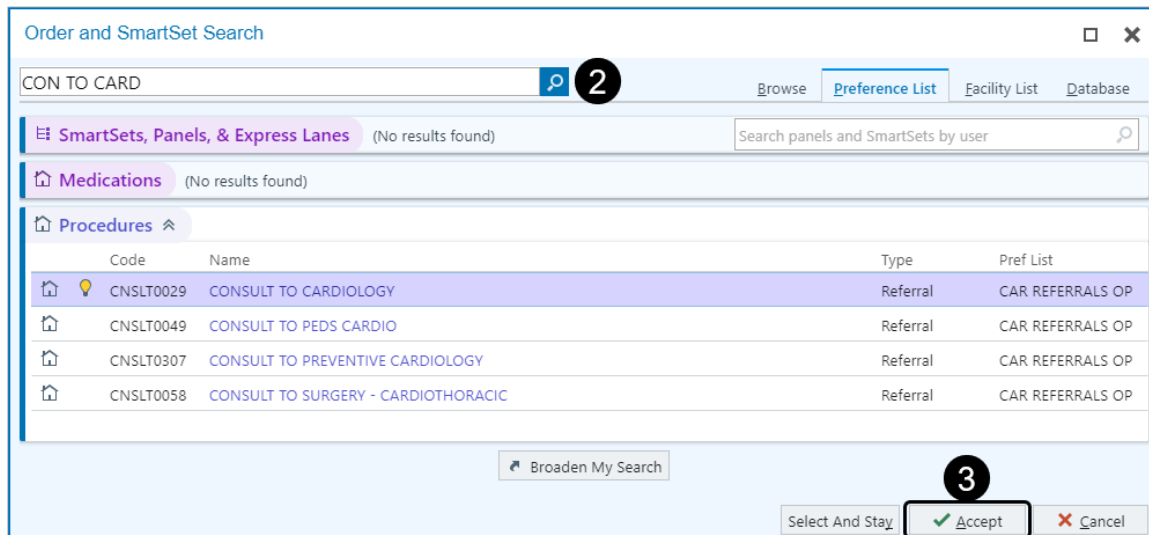
Use the Visit Taskbar to search for and order a consult. Fill out the details in the Order Composer window before signing the order.

1. Within the patient's ambulatory encounter, click the **Add Order** button in the **Visit Taskbar**.

Visit Taskbar

2. In the search field type **Con to Card** (or something similar i.e. **Ref Card**) and press enter on your keyboard to search.

3. In the **Order and SmartSet Search** window, select the appropriate consult order under the **Procedures** section, then click **Accept** to add the order.

Order and SmartSet Search window

4. The Order Composer window may automatically open if there are required or recommended fields. If the window does not open by default, click on the order to open the Order Composer window. Common fields in consult orders include:

   a. **Preferred Location**: Select the service area to refer the patient.

      i. For external providers placing referrals to Hillsboro Medical Center (Tuality or HMC in Epic), change class to 'external' and select 'external' as the preferred location. If loaded within your EPIC, you can select Tuality or HMC as preferred location, otherwise you will have to denote in your referral comments section.

   b. **Order Questions**: These can vary depending on the consult order, but common questions include:

      i. **Clinical question:** Enter your primary question for this referral to be addressed during the specialty's first visit.

      ii. **Co-management expectation:** Select an option to indicate any expectation of care continuity with the specialist. This may change depending on specialist recommendation.

   c. **Order Comments**: Different information or prompts might display depending on the consult order. Review and complete any information. This is where details about the patient can be entered for specialist review, such as history and workup.

   d. **To Provider:** Enter a clinician's name if referring to a specific clinician, although the receiving clinic might override this based on clinic guidelines or scheduling availability.

5. Complete the order details within the Order Composer window and click **Accept** when completed.

Order Composer Window

6. All orders typically require an associated diagnosis. You will see the **Associate Diagnoses** pop-up when clicking Dx Association or trying to sign an order missing a diagnosis.

7. Use the options to search for diagnoses or to select one from pre-populated lists. Be sure to assign primary diagnosis as a cardiology related diagnosis for the referral.

8. Associate a diagnosis with the correct order using the checkbox matrix.

9. When ready, click **Accept**.

Associate Diagnoses Window

10. When ready, click **Sign Orders** to send the consult order.

Sign Orders button