

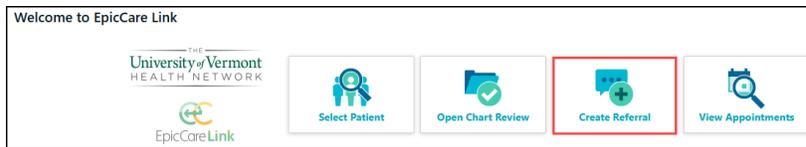
## EpicCare Link Create a Referral

This tip sheet outlines the process of EpicCare Link Support Staff placing a referral to a UVMHN location. Please be aware that this process will go through the same review process as faxed referrals, but the steps below will streamline the process for the clinic as well as the UVMHN departments.

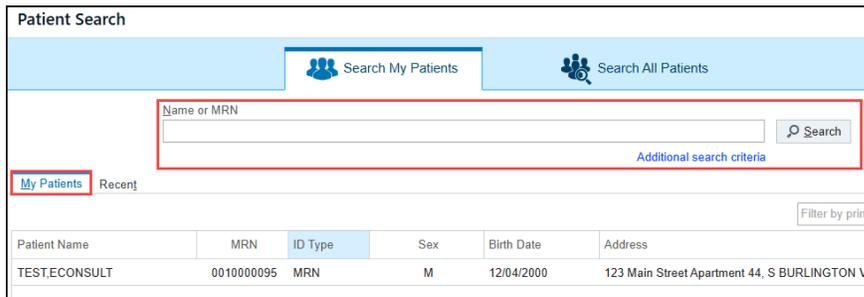
### Placing a Referral

Placing a referral can be done from the EpicCare Link home page or from within the patient's chart.

1. From the EpicCare Link home page, select **Create Referral**.



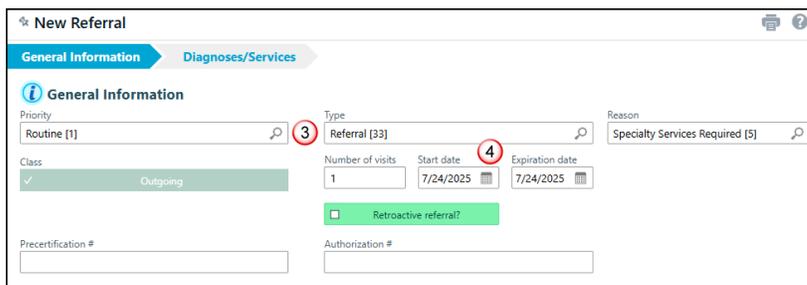
2. Find and select the patient from the **My Patients** list or by typing the name in the search field of the Patient Search activity.



3. In the General Information section, the **Priority** (Routine) and **Type** (Referral) default automatically. The priority can be updated via the magnifying glass, but the Type cannot be changed.

**Note:** For URGENT referrals, please clarify if your clinician ordering has contacted the on-call specialist to expedite the referral and call the clinic to notify them of the urgency.

4. Complete the number of visits with the start and end date.
  - The start and expiration date only pertain if an authorization has been obtained. The date will be one year from the date the referral is needed (e.g., if the referral is needed on 9/5/25, the expiration date will be 9/5/26).



5. Complete the **Referral By** field. This field will display a list of EpicCare Link providers. Select the name of the referring provider from the list.

6. Complete the **Referral To** section.

- If the Provider, Provider Specialty and Department Specialty are known, you may complete those fields.
- The Department field is REQUIRED and cannot be left blank. Select the department to which the patient is being referred.

7. Click **Next**.

The screenshot shows two sections: "Referral By" and "Referral To". Both sections have a note: "(It is recommended you fill in at least one item in this section)".

**Referral By:** The "Provider" field is highlighted with a red circle containing the number 5. There is also a yellow warning triangle icon next to it. The "Location/POS" field is empty.

**Referral To:** The "Provider" field is highlighted with a red circle containing the number 6. The "Department" field has a red exclamation mark icon next to it, indicating it is required. The "Location/POS" and "Department specialty" fields are empty.

A "Next" button is located at the bottom right of the form.

8. Enter a diagnosis as the reason for the referral.

9. In the Services field, choose the service beginning with the naming convention, AMB CONS/Follow up (Service).

10. If specific instructions are needed, enter those in the Notes field by clicking **+ Add**. The note section will expand for the ability to add comments and attach files, as needed.

The screenshot shows the "New Referral" form with three main sections: "Diagnoses", "Services", and "Notes".

**Diagnoses:** The "Diagnoses" section has a red circle with the number 8 next to the "Palpitations [888403509]" entry. There is a yellow warning triangle icon next to the section header.

**Services:** The "Services" section has a red circle with the number 9 next to the "REF206 - AMB CONS/FOLLOW UP CARDIOLOGY" entry. There is a red exclamation mark icon next to the section header.

**Notes:** The "Notes" section has a red circle with the number 10 next to the "Add" button.

At the bottom of the form, there are three buttons: "Back", "Request Referral", and "Cancel Request".

11. Click **Request Referral**.

12. To view the referral report and check its status after submission, click **Chart Review** and select **Referrals**.

13. Click the checkbox next to the referral you would like to review, then select **Start Review**.

The screenshot shows the Epic Chart Review interface. At the top, there are navigation tabs: SnapShot, **Chart Review**, Care Everywhere, Results Review, Flowsheets, Problem List, Medications, Histories, and a menu icon. Below the tabs, there's a sub-header "Chart Review - Loaded: 30" with icons for full screen and print. A secondary navigation bar includes: Pathology, Imaging, Cardiology, Ext Results, Procedures, Other Orders, Meds, LDAs, Episodes, Misc Rpts, Letters, and **Referrals**. Below this, there are controls: **Start Review** (highlighted), Refresh, Filters, and Hide Denied. The main area is a table of referrals:

<input type="checkbox"/>	Date	Referral ID	Procedure	Diagnosis	Status	From Provider	To Dept Specialty
<input checked="" type="checkbox"/>	07/17/2025	23849	AMB CONS/FOLLOW UP CARDIOLOGY		To Receiving	Jimerson, Amber, NP	Cardiology
<input type="checkbox"/>	07/14/2025	23737	AMB CONS/FOLLOW UP CARDIOLOGY	Sick sinus syndrome	To Receiving		Cardiology

14. The Referral report will open.

The screenshot shows the Epic Referral report for referral # 23849. The report is organized into several sections:

- Referral** (Referral # 23849)
- Patient-Friendly Report**: [Click to display Patient-friendly Report](#)
- Referral Information**:
 

Referral #	Creation Date	Referral Status	Status Update
23849	07/17/2025	Receiving Office to Obtain Authorization	07/17/2025: <a href="#">Status History</a>
Status Reason	Referral Type	Referral Reasons	Referral Class
none	Referral	Second Opinion	Outgoing
To Department Specialty	To Provider	To Location/Place of Service	To Department
Cardiology	none	none	UVMC MCCLURE 1 NI CARDI
To Vendor	Referred By	By Location/Place of Service	By Department
none	Jimerson, Amber, NP	none	none
Priority	Start Date	Expiration Date	Referral Entered By
Routine	07/17/2025	07/17/2026	Epiccare Link, Site Administrator
Visits Requested	Visits Authorized	Visits Completed	Visits Scheduled
1	1		
- Procedure Information**:
 

Service Details	Modifiers	Provider	Requested	Approved
Procedure				
REF206 - AMB CONS/FOLLOW UP CARDIOLOGY	none		1	1
- Referral Notes**: Number of Notes: 1