

S O U T H D A K O T A

Foundation for Medical Care

Best Practice Briefs

Chronic Disease Management
Screen, Test, Refer

Monument Health: Epic Referrals



- Michelle (Shelly) Roy joined Monument Health (formerly Regional Health) in Rapid City, South Dakota in January 2017, and is currently serving as the Senior Director of Community Case Management, Diabetes Education and Ambulatory nursing.
- During this past year, Shelly added the role of System Director for the Nurse Triage Call Center, which handled thousands of calls during the COVID-19 pandemic.
- Shelly is currently a Master Trainer/Lay Leader for Better Choices Better Health and serves on the BCBH Advisory Board.

Best Practice Brief: Chronic Disease Referrals

Shelly Roy, DNP, MHA,
BSN, System Director
Community Case
Management and
Diabetic Education,
Ambulatory Director of
Nursing



Agenda

- Overview of the decision-making process for adding referrals in EPIC
- Workflow and staff roles for follow-up
- Advantages and future of EPIC referrals

Decision Making Process

- Strong supporter of BCBH-SD programs
- Goal – streamline registration
- Staff identified in ambulatory setting – case managers, diabetes educators
- Patient cohorts created using clinical data
- Patient readiness assessed utilizing motivational interviewing techniques
- IT built auto-fax referral into Epic – first referrals January 2021

EPIC Workflow and Staff Roles



Information Technology – Training

Better Choices Better Health & Smoking Cessation Program Referral Autofaxing

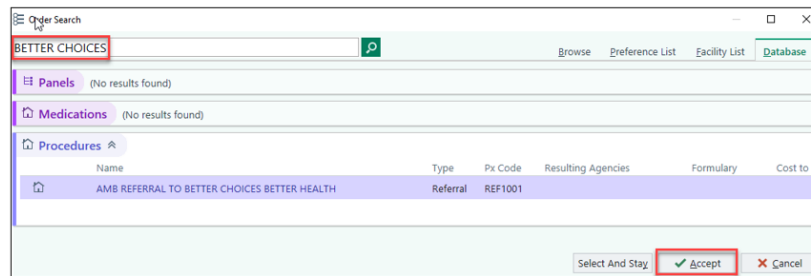
This tip sheet will walk through the autofax workflow for Ambulatory Referrals to Better Choices Better Health and Smoking Cessation Program.

Better Choices Better Health Referral

1. To enter an Ambulatory Referral within the patient's chart, select **Add Order** from the Visit Taskbar.



2. Using the Visit Taskbar, select Add Order, and search for **Better Choices**.



EPIC Workflow and Staff Roles

3. Complete the Order Composer, select **Accept**, associate a diagnosis, and select **Sign Order**.

The screenshot shows the EPIC interface for creating an ambulatory referral. The title bar reads "Ambulatory Referral to Better Choices Better Health" with "Accept" and "Cancel" buttons. The form includes the following fields and options:

- Class:** "Outgoing R" (selected), "Outgoing Referral" (highlighted)
- Priority:** "Routine" (selected), "Routine" (highlighted), "STAT" (button)
- Referral:** Override restrictions
- To loc/pos:** "South Dakota Bet" (highlighted)
- To provider:** (empty search field)
- To prov spec:** (empty search field)
- Comments:** (text area with "Insert SmartText" button)
- Status:** "Normal", "Standing", "Future" (highlighted)
- Expected Date:** "12/2/2020" (calendar icon), "Today", "Tomorrow", "1 Week" (highlighted), "2 Weeks", "1 Month", "3 Months", "6 Months", Approx.
- Expires:** "11/25/2021" (calendar icon), "1 Month", "2 Months", "3 Months", "4 Months", "6 Months", "1 Year" (highlighted), "18 Months"
- Footer:** "Next Required" (button), "Accept" (highlighted), "Cancel" (button)

- Note: The Better Choices Better Health referral will auto fax when sent to the location of: South Dakota Better Choices Better Health.

Advantages & future of EPIC referrals

- Ease burden of registration on staff/individuals
- Improved clinical outcomes through better disease management
- Vision – expand referrals to broad ambulatory setting involving caregivers and providers at all levels
- Future integration into clinical workflow – with identified roles and expertise

Questions?

Shelly Roy DNP, MHA, BSN

System Director Community Case Management & Diabetic Education
Ambulatory Director of Nursing, Rapid City Market
Director Nurse Triage Call Center



Monument Health System | 353 Fairmont Blvd | Postal Mail: [PO Box 6000 Rapid City, SD, 57709](mailto:PO.Box.6000.Rapid.City.SD.57709)

p: 605-755-8063 | f: 605-755-5573 | c: 406-671-4384 | e: mroy@monument.health

www.monument.health