

FAQ from 2024 Surgical Case Request Town Halls

1. What should I do if I have issues with care requesting or epic care link on July 21st?
Call Help Desk 1-888-481-2448
2. Does the system have the ability to build templates for surgical cases (i.e. Spine surgery that has multiple codes to input and consistently uses the same equipment, but the list can be extensive)?
Providers can customize the case request order sets and staff are able to save these versions. This is only available if you are using Prep for Procedure. ECL office staff does not have this functionality currently. All Independent procedural providers have full access to Epic and Prep for Procedure, so they are able to follow this workflow themselves.
3. Do combo cases still work the same?
For combo cases, the primary surgeon's office would take the lead in scheduling for both. Both Schedulers should communicate to provide the correct information. If each surgeon is performing a separate procedure, a second panel will need to be added within the scheduling screen (look for "Add Panel"). If surgeon #2 is just assisting or on "stand-by", please do not add a second panel, just simply add a second surgeon on *panel one* as the "assisting" surgeon.
4. Do we have to complete the question section to complete the case request?
Yes, please provide all pertinent information on the "Questions" page.
5. Will prior e-boarding cases carry on to epic?
Yes. If you submitted a case through e-boarding, it will be boarded into the new Epic without any effort on your part.
6. How would you register someone who is not already in the system?
Epic Care Link allows for creation of patients if no previously identified patient can be found. This requires 3 patient identifiers. Specific steps can be found under case entry in the guidebook.
7. Do you want equipment/tables for the surgery in the free text box for the schedulers like we do in e-boarding?
Yes, if it is not already on the Pref Card for the procedure and provider. Identify all equipment into the case request where it best fits. There are some "buttons" that you can choose equipment from - any other equipment/tables that are not found, please place in the free text box.
8. Do NP's need to be added that assist in surgery under physicians?
Yes, if their presence is necessary for the case, they should be added to the case request. This ensures the appropriate team members see the case on their surgical schedule.

9. If our doctors order T&A and BRONCH, do we have to schedule them in two places?

Yes - You will need to place a case request for the surgical procedure and a lumens order (via Anc Orders) for the Endo procedure. Please make sure to click on the box that tells Epic that the Endo procedure is in conjunction with an OR case.

Patient Location for Procedure:

Endoscopy Department	Pediatric Sedation Department	OR - With a Surgical Procedure	
OR - Standalone Procedure	Patient Bedside	Emergency Department	Other (comment)

10. Will outpatient cardiac catheterization procedures be scheduled this way?

These procedures are scheduled through Cupid. For medical group and Community Connect practices this will be done in Prep for Procedure using the appropriate cath lab preprocedure orderset. For ECL practices the cath lab procedure order is placed in the Orders activity. See the Cardiology appendix in the ECL Case Entry guide.

11. Does this process replace calling the boarding office when adding on cases for patients already on the schedule?

Any changes to an already scheduled case requires the submission of a change request through inbasket messaging to the scheduling team or phone call. If for the next day case a phone call is required.

12. For nuc med injections or needle localization's do cards have to be manually pulled?

No – there is no specific card for these procedures in the OR because they are done outside of the OR. **Please include the time of those procedures in the procedure description though.**

13. Is there an area in the Surgical scheduling module to type out the procedure as it should be listed on the auth?

Yes, the procedure description field of the primary procedure line and prints on the consent.

14. With Eboarding you could only see your case entries so if a coworker was off no one else was able to revise or even view a boarding.

Case Requests can be reviewed and updated by any member of an office. This can be done by searching for a patient using patient identifiers, then choosing the surgery.

15. Are we able to order pre-surgical labs as well?

You can order labs in ECL if it is needed before day of surgery. Any labs needed day of surgery will need to be emailed/faxed with the other preop orders.

16. Are we able to see open available times prior to scheduling or do we still need to contact boarding to secure a time?

Currently, you will need to call to hold time, however this functionality may be implemented in the future. OR Marketplace will display open OR times.

17. How will we be notified when a case is rejected or needs to be amended? Has previously been a notification to user email assigned to Epic user name.

Communication can be expected via Epic inbasket or a phone call between scheduling teams.

18. I know you can add the codes for surgery, but is there a way to also type the name of the procedure? For Example: Post Mohs reconstructions have 14 CPT codes. Is there a spot there where we can put Post Mohs reconstruction with flaps as grafts as needed of the left lower eyelid?

The CPT code area is multi-entry. Please enter as many codes is as necessary. The Procedure description should always be free texted by the submitter to contain the exact procedure description (this will also print on the consent). So in other words, you always should delete the auto filled text in the procedure description area and fill it in with your wording as stated above.

19. Will there be a recording of this training we can obtain for our own future purposes?

Live screenshots cannot be shared, but there is a video that we can share widely. This can be found when logging into Epic Care Link quicklinks. "Epic Care Link Case Entry Video"

20. Once this is live do we still need to fax in the physician boarding orders still?

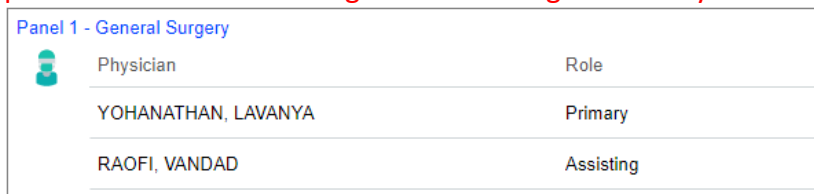
In EpicCare Link (ECL) you can place orders for labs, radiology orders, or specialty service referrals. For other order please follow your current process.

21. How would you cancel or reschedule a case?

Using Epic Inbasket to message the scheduling team – a phone call is not necessary unless you prefer.

22. I often schedule cases where there is a primary surgeon and an additional surgeon is just assisting. How is that scheduled?

The primary surgeon office places the case request and places any assisting surgeon in the additional personal box. When adding additional surgeons clarify their roll at that time as assisting



Panel 1 - General Surgery

Physician	Role
YOHANATHAN, LAVANYA	Primary
RAOFI, VANDAD	Assisting

23. Should a Case Entry & Order Entry be submitted when boarding a procedure or the Case alone is, okay? You can create a case request by using ECL Case Entry or Open Case (medical group and Community Connect). For medical group and Community Connect then you would still need to use Prep for procedure to place preop orders.

24. How would I add implants to the procedure after the case has been scheduled? (sometimes these are not known until a couple of weeks prior to the procedure)

Use in-basket to message the boarding office (or call)

25. Epic Link is only for surgery scheduling only, correct? We still need to use our regular Epic login for normal patient chart viewing?

Yes. Epic Care Link is a free service with limited functionality to submit surgical case requests and certain appointments.

26. Do we do Heart Cath Boarding this way as well? Yes. Heart Cath procedure requests will follow the same workflow. Medical Group and Community Connect will use Prep for Procedure. ECL practices will use the Orders activity (see the appendix in the ECL Case Entry guide book).

27. Do we still need to hold time at the facilities that still require that? You can request to hold times in OR Marketplace and then submit your case request.

28. There are several times when a patient does not search in ECL (even when using all identifiers), but when I log into OneChart, I can easily find the patient. How will this be corrected to prevent creation of duplicate patient charts when we cannot find the patient in ECL?
Scheduling and registration is able to merge charts if it is found duplicate charts exist for one patient.
29. Can we still call to add on a case for the next if the patient is admitted.
Yes, but for any patients already admitted, the provider should also be placing the case request order in Epic and calling the OR charge nurse for same day add on request.
30. To be clear, all request need to be put in Epic and not call scheduling?
Yes. for normal business please submit a case request using Epic Care Link. Certain situations may require a phone call or the use of Epic inbasket after placing the request in Epic first.
31. The doctor here does not have specific block or OR time whatsoever. will we still request a case the same way as shown? **Yes-you would select out of block on the case request.**
32. Is this going to be mandated?
Yes. To request surgery scheduling time at a Corewell Health Facility the free service Epic Care Link must be used.
33. What does pulling a card mean?
In surgery “pulling a card” means pulling the surgical preference card. The preference card lists all the supplies and equipment the surgeon requests for the OR to have available at the start of the case.
34. do I have to choose a type of anesthesia? **Yes-many are defaulted on the pref card. If you do not select the type of anesthesia then you may not have an anesthesia resource assigned to your case.**
35. What is the appropriate on boarding phone number we should call to schedule surgeries prior to scheduling in Epicare? **You do not need to call first. Submit your case request in ECL. If the scheduling team has any questions they will contact you via InBasket or phone call.**
36. Do we still need to fax the physician orders to pre-Anesthesia? **Yes for ECL practices. Medical group and Community Connect practices should be using Prep for Procedure to enter the preop orders.**
37. With all sinus, thyroid, cases where do we put navigation or nerve monitoring? **This is in the anesthesia special needs on the case request.**
38. Is there somewhere we should be putting whether the patient needs to go to the B ready clinic or the Sttar clinic? **Yes! These clinics or “anesthesia protocols” are documented on the Questions page with the ERAS button (Enhanced Recovery after Surgery). Please also include this in the procedure description. See below.**
- Anesthesia Special Consideration(s)/Need(s)?** LVAD Cardiac Implantable Electronic Device Malignant Hyperthermia TIVA Requested - Neuro Monitoring Goal Directed Fluid Therapy ERAS None Other
39. If adding a case after 3:00pm for a next day surgery, do we still call the control desk or do we schedule it in EpicCare? **Submit the request in ECL and call.**

40. Is there any place to order preop antibiotics? **Not in ECL. Preop orders will need to be emailed/faxed. Medical group and Community Connect can place preop orders in Prep for Procedure using the appropriate order sets.**
41. Do we still need to call the boarding desk to reserve the slot, or does this take the place of that? **Yes, this protocol has not changed as of yet. There are optimizations on the horizon though!**
42. Can we attach a clearance/multiple clearances? **Any surgical related forms will need to be emailed/faxed per the current protocol.**
43. Is booking for heart cath through Cupid mandatory, or can we still call? **You need to place the order in Epic first and then you can still call if you would like.**
44. What are the locations (naming conventions) within Epic Case Entry for each hospital? **Everything starts with BH for Beaumont Health and then it's followed by an abbreviation for the desired hospital.**
- a. BHRO – Royal Oak
 - b. BHRO Surgery West Bloomfield – West Bloomfield Surgery Center
 - c. BHTR – Troy
 - d. BHTR Surgery Macomb – Macomb Surgery Center
 - e. BHDB - Dearborn
 - f. BHGP – Grosse Pointe
 - g. BHWA - Wayne
 - h. BHTA - Taylor
 - i. BHTN MC– Trenton Main Campus
 - j. BHTN SC – Trenton Surgery Center
 - k. BHFH – Farmington Hills
45. Will prescreen still be calling the patient prior to surgery? **Yes**
46. When NOT selecting yes on ready to schedule, does that mean it will stay in the system so you can close out and come back to make changes? **Yes. The case request will not be scheduled and will be left alone until the office team selects “ready to schedule”**
47. Does my surgeon board the same way? She does not have a log in for this. **Your surgeon would follow a similar process but surgeons will have the full version of Corewell Epic and will log into the same Epic they use for all other purposes and enter a case request there.**
48. What happens if the other physician's office uses EPIC instead of ECL to board cases? **Either version of Epic is able to submit or edit an existing case request**
49. We have 2 new providers starting in the next 2 months. Will they automatically be added to EpicCareLink or does the practice need to do it? **Surgeons will have access to the full Corewell version of Epic and will not need Epic Care Link. So no Epic Care Link actions are needed for new surgeons. Epic Care Link is for office staff that do not have full Epic and submit case request on a surgeon's behalf. New office staff that are submitting case requests will need their office manager to request Epic Care Link access.**

50. I am currently the only one in our office scheduling surgeries. Will everyone in my office, i.e. users and physicians in EPIC get a new password? **Only staff that have requested access to Epic Care Link will receive a password and login.**

51. How do we request an induction?

Inductions are scheduled via the Appointment Desk

52. What is the turnaround time for the hospital scheduling team to pick up a case?

Schedulers board and place cases in date order. That being said, the expected scheduling time may vary depending on the Lead Time of the case.

53. For codes that include procedures like Angiogram or Shunt study, do we need to include it in the description?

YES! The description should be exactly what procedures the doctor is performing on the patient. The procedure description area is what the consent is pulled from.