

## Requesting an EDAPT Referral via EPIC

Step 1: Open your client's chart.

Step 2: Select "Add order".

The screenshot displays the EPIC patient chart interface. It is divided into three main sections: Progress Notes, Patient Goals, and Problem List. At the bottom, there is a navigation bar with two buttons: '+ ADD ORDER' and '+ ADD DX (0)'. The '+ ADD ORDER' button is circled in red, and a red arrow points from the text 'Step 2: Select "Add order"' to it.

**Progress Notes**

+ Create Note | 1 PPEUSED | 2 Video Visit | 3 HPI | 4 SOAP Note | 5 HIM NON F2F

No notes of this type filed.

**Patient Goals**

Goals is currently read-only. You do not have security to edit goals.

Goal	This Visit's Progress	Recent Progress
Improve behavioral health management Notes 65165		On track (-8 yr)
Improve behavioral health management Notes 9/18/13-5964596		
LDL CHOLESTEROL (DIRECT) < 100 Notes		
LDL CHOLESTEROL (DIRECT) < 100 Notes		
Weight < 68 kg (150 lb) Notes		36.3 kg (80 lb) (-1 yr)

[View Past Values](#)

**Problem List**

Care Coordination Note Edited: Sagues, Vaihere 12/6/2017 [View](#)  
Opioid PPA broken. Do not refill.

Search for new problem   Show:  Past Problems

Diagnosis  Sort Priority

Malignancy

Malignant neoplasm of nipple of left breast in female (HCC)

Cancer Staging

Date	Classification	Stage	Status
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**Step 3:** In “Add Order,” type “EDAPT Referral” and hit ENTER when that appears.

The screenshot displays the EPIC EHR interface with three main sections: Progress Notes, Patient Goals, and Problem List. A red arrow points from the instruction text to the 'EDAPT Referral' option in the 'Add Order' dropdown menu at the bottom of the screen.

**Progress Notes**

+ Create Note 1 PPEUSED 2 Video Visit 3 HPI 4 SOAP Note 5 HIM NON F2F

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**Patient Goals**

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Diagnosis Sort Priority

Malignancy

Malignant neoplasm of nipple of left breast in female (HCC) ^ Unprioritized ▲ ✕ + ▼

Cancer Staging

Date	Classification	Stage	Status
EDAPT Referral			

+ ADD DX (0)

Px Code	Name	Type	Pref List
AMBREF0318	EDAPT REFERRAL	Referral	AMB RE...

**Step 4:** Fill in all required areas by clicking through them.  
See specific notes below for further guidance.

**Do not edit this section.**

- Reason for phone interview? Client may be at high risk for developing psychosis
- Did the client (& parent if a minor) agree to a phone interview? Yes
- Referral Reason: Evaluate and Treat
- Next Required: Accept
- SIGN ORDERS (1)

**NOTE:** Please do not edit the “Reference Links” section.

- Reason for Phone Interview?** Is the client at risk for OR experiencing psychosis?
- Did the Client agree to be contacted by EDAPT?** Yes or No. The answer must be “Yes” to proceed with sending the referral form. Otherwise, send **Carolina Valdovinos Ramirez** a message via EPIC for clients who refuse the Phone Interview/Questionnaire.
- Click the text in the “**Comments**” box and select the applicable symptoms by using the yellow arrows to toggle your responses.
- Click “**Accept**”.
- Click “**Sign Orders**”.

**Step 5:** Enter diagnosis and click “Accept”.

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## OTHER HELPFUL TIPS

### Making sure the referral was sent successfully:

Click “**Chart Review**” on the left column, then look under the “**Other Orders**” tab to view your request.

### If you have any issues completing this form:

1. Ensure all REQUIRED areas have been filled out.
2. Ensure you have filled out the “comments” box.
3. If you are still unable to send the referral, please send a message to **Carolina Valdovinos Ramirez** via EPIC for clients or call the EDAPT clinic line at: **916-734-7251**.
4. You may also **fax** the attached interview request form to **916-734-7539**.