MedLink

Contents

Access and In Basket Related Questions

How do I request access to MedLink?

MedLink Home Page: A Provider or Clinic Staff member will be able to submit a request for MedLink access for the entire clinic but will require a sponsoring provider with the submission. From the MedLink homepage, select **Request New Access** and select **Create Account** and select the appropriate role. Before moving to the verification step, please ensure that a provider account is submitted with the request. Once all appropriate roles are added to the request, complete the verification page. Capture the **reference number** and review the next steps of the process. You will receive an email requesting you to verify your email. If you have further questions regarding MedLink enrollment, please contact the Stanford Referring Provider Services Hotline at **1-866-742-4811**.

Manage My Clinic: Existing MedLink users (Physicians/Site Administrators) can request access for delegate (Clinical Staff and Office Staff) users from **Manage My Clinic**. Manage My Clinic can only be accessed by Provider/Site Administrator and is available after Login.

If I forgot my password, how do retrieve my password?

From the MedLink homepage, select **Forgot Password** link. You will be prompted to answer security challenge questions (set by user). Once security questions are correctly answered, user will be allowed to change password. *Note: If you do not remember answers to your security questions, you must call the SHC Service Desk at (650)-723-3333 to reset password.*

How do I change my Password and Security/Challenge questions?

Login to your MedLink account. From the homepage toolbar, click on the gear icon next to the "Log Out" button. Select **Change Password** or **Challenge Questions**.

My temporary password is not working, how do I reset my password?

After your MedLink account is approved for access, you will receive a Welcome Email with username and temporary password. Please input the username and password directly (do not copy and paste from email) into the Login and Password field. If temporary password still does not work, please call the SHC Service Desk at (650) 723-3333.

Is a 2FA passcode needed for every login?

After the initial setup, the next time you attempt to log in, the system sends you a one-time passcode using the method you had selected and prompts you to enter that passcode. You can then select a check box "Remember Me" to have the system remember you on that same browser. If you **use the same workstation and browser** for your subsequent logins to MedLink, you will not be prompted for a passcode for the next **30 days**.

Can I reset my authentication method?

When you first set up two-factor authentication, you also receive a reset code that you can use to reset your two-factor authentication settings. For example, if you replace your smartphone, you can use this reset code from the login screen to set up two-factor authentication with your new phone. Unlike passcodes, the reset code appears only once after you set up your authentication method. You should use this reset code only if you need to change how you receive passcodes.

I am moving to new clinic; how can I update my MedLink access to view the patients at my new location?

You will need to request access for MedLink again by selecting **Request New Access** from the MedLink home page. Please provide the details of the new clinic and your updated information while signing up. The registration process will ensure that your current access is retained while updating the mapping of your account to the new clinic. Please note that not all clinics have access to MedLink and/or eligible for MedLink access. If your new clinic does not currently have MedLink access and/or providers do not refer to any Stanford Health Care/ValleyCare/Stanford Affiliated (UHA) clinics, then access could be denied by SHC Referring Provider Services.

What information is available to referring provider via MedLink?

MedLink gives referring physicians access to the same electronic medical record that Stanford faculty and medical staff use. Everything from care notes and lab results to radiology images and reports are available to referring physicians as soon as they are available.

Can I send messages to other MedLink Users/Stanford Providers?

Yes, you can send messages via the In Basket feature. Search for the desired user or Stanford provider in the "To" field. Refer to the User Guide for detailed instructions on how to send an In Basket message.

Can I send messages to messaging pools at Stanford?

Yes, you'll need to know the messaging pool and type it in the **To**: field in the following format: "**P [insert pool name]"** to search for the pool. Any Stanford staff with access to the messaging pool can review your message.

How do I add my provider's In Basket to my view?

First, you must be granted permission to the view your provider and/or staff's In Basket (refer to the section Give Permission to your In Basket within the User Guide). Once you have permission to add your provider/staff in your view, you can then attach there in basket to your view. Navigate to the In Basket activity and select attach. Refer to the User Guide for detailed instructions on how to attach a provider/staff in basket to your view.

Notifications

Why am I receiving Event Notifications in my In-Basket?

Event Monitor allows users to monitor events that occur for their patients. Events are triggered by actions in SHC instance of Epic, such as Inpatient admissions, ED Admission, or Outpatient notifications for closed encounters. Each event triggers an In-Basket message from SHC Epic Hyperspace to MedLink.

Am I able to opt in/opt out of which notifications I receive in my In- Basket?

Yes, you have the option to configure what types of patient events you are notified of under User Settings which is the gear icon located next to the Log Out Button. Step-by step instructions are available in the User Guide.

Can I turn on notifications (Email/Text) for new In Basket messages that I receive in MedLink?

Yes, MedLink offers users the options to also be notified of certain patient events via text or email. Step-by step instructions are available in the User Guide.

Site Administration

What is the role of the Clinic Site Administrator?

Site Admins have the following two responsibilities:

Site Verification: Every six months, Providers/Site Administrators will be promoted to verify all users. If any users have left the clinic or no longer need access to MedLink they should be selected as no longer active. Sites must be verified by admins every six months.

Manage My Clinic: Providers/Site Administrators will have access to a list of all MedLink users from their Clinic. They can deactivate users at any time from Manage My Clinic and request new user accounts for delegates.

How many Site Administrators can a clinic have?

While there is no limit to the number of users who can be Site Administrators, we recommend limiting it to only a few users who can ensure that only appropriate users have access to relevant patient information.

I accidently deactivated a user; how do I reactivate the users MedLink account?

Please call the SHC Service Desk at (650) 723-3333.

Referrals

Why can I no longer submit my referral through Referral Entry?

As of August 2023, the Referral Entry activity was replaced by the Referral Order Entry activity. To submit referrals to Stanford physicians, navigate to the Order Entry activity and select referral order of choice. Please see the Order Entry FAQ section for more information. Note: Affinity users will continue to have access to Referral Entry to submit referrals and authorizations for in-network facilities outside of Stanford Health Care

Do I have to answer all the questions asked in a referral order?

We recommend completing as much information as possible. However, you are welcome to skip the fields which are not indicated as required. Most referral orders will have a Comment field available for any additional notes or patient specific information.

I do not see the specialty or procedure order I am looking for as an available option, how can I submit the order?

Currently, we only have specialty consult orders available on MedLink. If you do not see a specific specialty or procedure, please select the specialty that is the closest match to the desired option and use the Comment field for additional context. Our internal teams will reach out and contact you for additional information. You may contact the following numbers for additional support:

- For concierge assistance, referral tracking and MD consult assistance, call 650-724-1314.
- For referrals related to the Affinity Medical Group, call 1-800-615-0261.

How do I refer directly to a specific provider?

Search for the desired provider in the **Provider** section of the referral order, and our New Patient Coordinators will ensure your patient is scheduled accordingly. Please note that some referral orders do not have the option to indicate a specific provider or department. Please indicate any preferences using the **Comment** field as needed.

How do I refer directly to a specific department or location?

If available, use the **Department** field to search for the desired department. Some orders have the option to indicate a **Preferred Location** within the orders questions. Please note that some referral orders do not have the option to indicate a specific provider or department. Please indicate any preferences using the **Comment** field as needed.

What does the "Class" field mean?

The referral class helps route referral orders to the appropriate internal teams for processing. Below are the general regions and clinic locations for each class:

- Stanford and Emeryville: South Bay (San Jose) and Peninsula (Palo Alto, Portola Valley, San Mateo), East Bay (Emeryville)
- UHA (now Stanford Medicine Partners (SMP): South Bay and East Bay

I would like a consult for my patient with a Stanford provider, and do not want my patient to be evaluated or treated at this time. How do I indicate this in the referral?

All referral orders available through MedLink are for consult only.

I created a referral order in error, what do I do?

Navigate to the **Order Review** activity and cancel the referral order.

Can I upload additional notes/attachments to a referral order?

Yes, each referral order will have the option to add multiple files to the order.

Can I append a referral with additional notes and/or attachments?

While you cannot edit a referral via the portal, you can always add new notes and attachments even after submitting the referral. Refer to the User Guide for detailed instructions.

How do I respond to a referral notification letter?

If you get a referral notification letter, this means that the clinic/provider that you are referring your patient to, is requesting additional medical information for them to be seen. You will be required to attach/respond to this message to get an appointment scheduled. Refer to the User Guide for detailed instructions.

Order Entry

What is Order Entry?
Order Entry is a functionality within MedLink that allows community physicians to electronically submit laboratory and radiology orders through the MedLink digital portal.

How do I place and submit an order for a patient?
Navigate to **Place an Order**, search for the patient and either use the search function or the preference list to sign the order. All orders must be signed to be completed. Refer to the User Guide document for step-by-step instructions.

What orders are available in Order Entry?
Users can Pend and Sign orders for the following:

- Imaging services at Stanford Health Care (SHC), ValleyCare (VC), and Stanford Affiliated Practices (UHA). For Interventional Radiology referrals, please use the MedLink **Create a referral** option instead.
- Laboratory orders including specimen collection orders at Stanford Health Care (SHC)
- Referral orders to Stanford Healthcare, UHA (aka Stanford Medicine Partners (SMP)) and Emeryville

What if I cannot I find the specific order I'm looking for?
It is likely that the procedure or order you are looking for was purposely excluded from being orderable via MedLink. If a provider needs to place such an order, submit a **Requisition Order** as per usual practice, such as through Fax.

Why cannot I sign the order?
Only providers have the ability sign orders. Other clinical staff can only **Pend Orders** for signature. Referral orders are an exception and can be signed by any user.

What does 'Pend Order' mean? Who can use it?
Pend orders allows non-physician users (referral coordinators, MA's, other clinical staff) to prepare orders for physician review and approval. **Pend Orders** save orders in an 'incomplete' status and are not considered complete until signed by a physician who are notified 24 hours after an order is pended.

Where do I view pended orders?
All submitted orders for a patient are available in the **Order Entry** activity.

What does 'Sign Order' mean and what happens when I do this?
'Sign Order' is only available to Medlink providers. It completes the ordering process and sends the order to Stanford. Be sure to complete all required fields and resolve warnings.

How can I sign only one of the orders?

MedLink currently only supports order signature for the entire encounter. We recommend you remove orders that may not be needed for the encounter and submit a new order in another encounter.

How do I cancel orders?

If an order remains unsigned, deleting it will remove it from the encounter. If you are attempting to cancel a signed order, select the **Trash** icon to delete and notify Stanford of the cancellation.

How do I review the status of signed orders?

The **Order Review** activity is the best way to look at all the orders placed for that patient and shows the Order Status and Appt Status.

How do I route the order to SHC/VC/UHA?

Referral Orders

Depending on the order, you will get the options to choose any of the following options in the Class field which will determine where the referral is routed:

- Stanford Referral: Routes to facilities associated with Stanford Medicine faculty that are generally located in the Peninsula (Palo Alto and Redwood City)
- UHA (aka SMP referral): Routes to clinics throughout the larger Bay Area that are part of the Stanford Medical Partners (formerly) UHA) Medical Group
- Emeryville Referral: Routes to clinics located in our Emeryville location.
- External Referral: Routes to external facilities outside of Stanford Health Care. Currently we do not support this option through MedLink.

You can also indicate specific providers or specific departments in the order if desired and our new patient coordinators will do their best to accommodate the request.

Radiology Orders

To route the order to the right location, you must select the correct **Order Class**. If an incorrect order class is selected, the referral may not go to the correct location which can delay patient care. The location of this field is in the **Edit Orde**r screen. Refer to the User Guide for additional details. In general, the following order classes within the SHC network are available for ordering via MedLink:

- Stanford [50]
- Hosp Performed [22]
- ValleyCare Hosp Outpatient [88]
- Imaging San Jose [92]
- Pleasanton CT [95]
- Menlo [51]
- Bay Valley [75]
- AMG San Pablo [93]

<u>Laboratory Orders</u>

To ensure proper routing, all lab orders available in MedLink are defaulted to **Resulting Agency = SHC Lab[14]**. User can only place orders for collection for **ValleyCare Lab [233]**.

Can I change the default values in the order?

Except for the Order Class (for Radiology orders) and Order Count (for Lab Orders), we generally recommend that you keep the default values as suggested.

Why can't I accept the order after editing?

If you have difficulty in selecting 'Accept' option after editing the order, it is likely that hard stops (marked by **red exclamation marks**) need to be filled. If you are trying to save your progress, you will NOT be able to accept/pend any orders that are missing this critical information.

Radiology Orders

Why hasn't a radiology order been scheduled?

It is possible that the order was never completed(signed) and therefore never entered Epic for routing, protocoling, or scheduling. If it was signed/ completed and has not been handled within 2 business days, it may require some investigating.

What is a Decision Support warning and when do I encounter it?

If you encounter a decision support warning when attempting to sign an order, this indicates the system detects the "Reason for Exam" as not matching a selected procedure. The warning will attempt to provide alternate solutions to the situation by offering different procedures that have a higher appropriateness score than the original option.

Do I have to select the options listed on the Decision Support warning?

Selecting the offered solutions is not mandatory but is recommended. Typically removing the existing procedure and replacing it with another procedure that meets medical necessity but has a higher appropriateness score would be considered best practice. This can be done by selecting the 'Remove' option and one of the recommendations. Selecting multiple recommendations may create multiple orders. It can also be manually handled by backing out of the order and changing it.

What is Advance Beneficiary Notice (ABN) Warning and when do I encounter it?

Providers may encounter an ABN warning, which typically means the patient has Medicare A/B insurance and a diagnosis was chosen that Medicare does not currently support. This means the patient may be financially liable for the procedure if they continue with any future scheduled appointments. If encountered, the provider must have the financial liability conversation with the patient or change the diagnosis to another one that meets medical necessity.

Can referral coordinators receive warnings for the orders they're pending if there is an Advance Beneficiary Notice (ABN) or Clinical Decision Support (CDS) issue?

Currently MedLink does not have that capability – all warnings are triggered upon attempting to sign them. Therefore, people who are pending orders will not see ABN warnings or CDS appropriateness score warnings. See ABN and CDS warning sections below for further details.

Can I change the order within the ABN warning, like the CDS warning?

To change the diagnosis, you must back out/cancel signing the order, edit the referral, and change the diagnosis to another one that meets medical necessity and sign the order again.

Why does the ABN warning keep coming up even though I'm changing the diagnosis?

This means you are still choosing diagnoses that are flagged as posing high likelihood of financial liability to the patient with their Medicare insurance. Ensure that the patient signs the ABN paperwork (if they agree they may self-pay) or to choose another diagnosis that meets medical necessity.

How do I find out the financial cost of the procedure (during an ABN Warning) if the patient wants to know?

This information is available by selecting a pop out window in the warning, called 'Attached Advance Notice Waiver Form'. The estimated cost is listed within that pop-up window. If patient wants to continue with the procedure as-is and is willing to accept financial liability, the 'Notice Status' should be changed to the appropriate value ('Patient to Sign ABN' or 'ABN Signed, Service Accepted' if they signed a printed version of this sheet).

What should I do if the patient wants to proceed with the original selected procedure/diagnosis?

If patient agrees to sign the waiver form, it should be printed out, signed by the patient, and brought to their future appointment. The 'Notice Status' must also be updated accordingly. If printing is not possible but the conversation was held with the patient and they still want to proceed, the best status to use is "Patient to Sign ABN".

Do I have to record decision support information for advanced imaging orders?

Unless specifically required by the order, you can skip the record decision support information for certain advanced imaging orders.

Specimen Collection (MedLink only)

Who can collect and send specimens to Stanford labs?

Users who have Specimen Collection access and whose clinics are associated with a submitter record can collect and send specimens to Stanford labs.

How can I request Specimen Collection access for myself and for my clinic?

If you are a new MedLink user, ask your Site Administrator to submit a New Account Request access on your behalf and mark **Yes** to the Specimen Collection question.
If you are an existing MedLink user, you can request access by sending a **Request Specimen Collection Access** message through In Basket.

Please note: Specimen Collection access will require an additional 3-5 business days of processing. You may receive your MedLink username and password first before specimen collection access becomes available.

How do I collect and send specimens to Stanford labs?

Once you have the Specimen Collection access, navigate to **Order Review** and search for the patient and the lab of interest. Then click on **Collect Specimens**. Refer to the User Guide for a step-by-step guide.