

**EXACT
SCIENCES**

EpicCare® Link



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Follow the steps below to help walk through various touchpoints within EpicCare® Link. For any questions pertaining to these steps please feel free to reach out to your Cologuard® Representative.

ORDERING COLOGUARD

1. Start on the EpicCare® Link Home Page
2. Click on **Order Cologuard** in the quick click boxes on the top right hand quadrant of the screen
3. Choose any one of the options below to start an order:
 - a. Search My Patients
 - b. Search All Patients
 - c. Create a New Chart
4. Click **Order Entry** tab in Patient's Chart
5. Select **Authorizing Provider** in dropdown menu
6. Select **New Procedure**
 - a. Type: Cologuard
7. Edit Order
 - a. Add New Diagnosis Code
 - i. Z12.12 and Z12.11
 - ii. Screening for colorectal cancer
 - iii. Up to HCP's discretion
 - b. Answer the optional 3 questions
8. Click **Sign Orders**
9. Order has been placed for patient

CREATE A NEW PATIENT CHART

1. Start from the EpicCare® Link Home Page
2. Click **Select Patient**
3. Select the last Patient Search option
 - a. Create a **New Chart**
4. Fill out Patient Demographic information

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5. Click **Create**

6. Billing Information is prompted

7. Click **Add Coverage**

- a. Select payor by magnifying glass or typing in the search bar
- b. Add Member ID
- c. Select **Plan**
- d. Add Subscriber info (if applicable)
- e. Add Group Number

8. Additional way to Add Coverage

- a. Click **Upload Insurance** on bottom left hand corner
- b. Choose **File**
- c. Click **Submit for Review**

SEARCHING PATIENTS

1. Start on the EpicCare® Link Home Page

2. Click on:

- a. **Select Patient**
- b. Open Chart Review
- c. Order Cologuard
- d. **Select Patient** on top of menu bar

3. You will search for a patient 1 of 3 ways:

- a. Search **My Patients**
 - i. Patients that have been prescribed Cologuard or chart has been viewed in the last 365 days
- b. Search **All Patients**
 - i. Any patient in the Exact Sciences Laboratories database
 - ii. HCP will have to provide information on patient and why they are opening their chart
- c. Create a **New Chart**
 - i. Starting a new patient chart for a patient that has never been prescribed Cologuard in the past

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CHART REVIEW

1. Start from a patient's chart
2. Click on **Chart Review** on the top tab of the patient's chart
3. Cologuard Lab Test will display
4. Result will be available (if applicable) in list
5. Click on the Date/Time to the left of the lab result
6. Results will be available
7. Result: positive/negative will be located in the middle of the report Component
8. Click the **Printer Icon** in the top right-hand corner to print results

RESULTS: SINGLE PATIENT

1. In Basket:
 - a. New results are in the Result Notifications section of your In Basket. You'll see an alert in the Event Monitor section of your home page when a new result comes in.
 - b. You can click **Select Patient** to jump to the patient chart
 - c. You can click **Print Selected** to print the result report for one or more patients
2. Chart Review: Follow instructions above to access Chart Review for a patient

RESULTS: HEALTH ORGANIZATION OR LOCATION

1. There are dashboards showing data at 3 levels:
 - a. Organization
 - b. Location
 - c. Provider
2. The left side will be a summary review of results within the last year.
3. On the right side will be the **Reports**
4. Simply select which makes most sense, and a roster report will be loaded.
5. You can then Print, or Export this report to Excel

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INBASKET – RESULT NOTIFICATIONS

1. Start on EpicCare® Link Home screen
2. Click **InBasket** option on top Menu Bar
3. Click **Result Notifications** on left side of screen
4. Click on Patient name
5. Result report will display on bottom half of screen

ORDER RESCREEN

1. Select **Dashboards**
2. Run the report **Cologuard – Patients Due for Rescreen**. You can run the organization, location, or provider-level rescreen report.
3. For each patient you'd like to rescreen, click the chart icon to jump to the patient's chart.
4. Select **Order Entry**, and follow the Ordering Cologuard instructions to place a new Cologuard order for the patient.

REQUEST NEW ACCOUNT

Account Request for HCP Experience

1. Open Web Browser
2. <https://www.cologuardtest.com/hcp>
3. Click **Ordering Cologuard**
4. Scroll to EpicCare® Link Column
5. Click the **here** link
6. Click **Request New Account** on Login Page
 - a. Request Access for **New Site/Location**
 - b. Request Access for **New Provider**
 - c. Request Access for **New Clinical Staff Member/Designee**
7. Directed to Confirmation page
 - a. Request may take up to 2 business days
 - b. HCP will receive 2 emails (username and password are separate)

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- c. Enter username and password in Login screen
- d. Will be prompted to change password the first time the HCP logs in
- e. Any questions, call 844-870-8870 to talk with an Exact Sciences Laboratories Provider Support Specialist

REQUEST A NEW USER

1. Click **Manage My Clinic**
2. Select the **Request** tab and click **Request New Account**
3. Choose the type of account to create
 - a. Access to New Site
 - b. Access for Provider
 - c. Access for designee
4. Enter User's demographic information
5. In the User Group field, select the user group to which the user should belong
6. Enter a comment about the request, if necessary, and click Submit Request

Note: Site Admin will be able to see the status of the user requests that have been submitted in the Status column on the Requests tab

CHANGE A USER'S PASSWORD

1. Click **Manage My Clinic**
2. On the My Clinic tab, select the radio button for the user whose password you need to change and click Change Password
3. In the **Your Password** field, enter the password you use to log into EpicCare® Link
4. In the **New Password** and **Re-Enter New** fields, enter the new password for the user
5. Click **Accept**
6. Tell the user their new password
7. The next time the user signs in using this password, they will be required to select a new password of their choice

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DEACTIVATE A USER

If a provider, designee, or site administrator leave the site, they should be deactivated in EpicCare® Link

1. Click **Manage My Clinic**
2. On the My Clinic tab, select the radio button for that user and click **Deactivate**
3. Enter a comment indicating why the user will be deactivated
4. If the user is associated with multiple sites, they will have to be deactivated from each site individually

NAVIGATING THE DASHBOARD

1. Click on **Dashboards** on the top Menu Bar
2. Summaries Section (left hand side)
 - a. Orders by Status
 - i. Shows number of orders based on current status (ex. Cancelled, results available, and reorders).
 - b. Orders by Result
 - i. Shows result for orders placed. This can be used to track results that are positive, negative, or sample could not be processed
3. Reports Section (right hand side)
 - a. Report Listing
 - i. Generates a personalized list of reports
 - b. Reorders
 - i. Patients due for rescreen; a patient will be removed from this list after an order has been placed
 - c. My Orders
 - i. Orders placed based on certain timeframes
 - ii. Outstanding kits are kits that have not been returned
 - d. My Results
 - i. Available results based on certain timeframes

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UTILIZING DASHBOARD REPORTS

1. Click on **Dashboards** on the top Menu Bar
2. Click a report hyperlink (right hand side) to drill down into more information
 - a. Print the Reports
 - i. This allows you to print the report displayed, exactly as it appears
 - b. Export to Excel
 - i. Click the **Export** button on the top left hand side of the screen.
 - ii. You will be asked for a password. Do not use the same password that was used to login
 - iii. Password will be needed when opening the Excel once it's downloaded
 - c. Sort Columns for Information
 - i. Click on the column header you want to sort data
 - d. Open Patient's Chart
 - i. Jump to the patient's chart by clicking on the blue folder on the left hand side of the screen

DASHBOARD REPORT VIEWS

1. Start on EpicCare® Link Home Screen
2. Click on **Dashboards** on the top Menu bar
3. Click on the **Down Arrow** to change view
 - a. Healthcare Org Designee Dashboard
 - i. View of all locations across entire healthcare organization.
 - b. Location Designee Dashboard
 - i. View of all orders for all providers placed for the location (login department)
3. Search for and select the **Dashboard** you want to run

EVENT MONITOR SETTINGS

1. Click **InBasket** option on top Menu Bar
2. Click **Result Notification** on left side of Screen
3. Click **Event Monitor Settings** on top of screen

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4. Event Filter

- a. Option to receive notifications on
 - i. Positive Test Results
 - ii. Negative test results

5. Relationship Filter

- a. All Event for Patients in my Group
 - i. Notifications for any patient that the HCP has access to
- b. Only Events associated with my Group (Recommended)
 - i. Notification for a patient an HCP has access to that has an order result, and the orders authorizing provider is a part of the HCP group
- c. Only events associated with me
 - i. HCP that only want's receive results for HCP's they are associated with

6. InBasket Settings

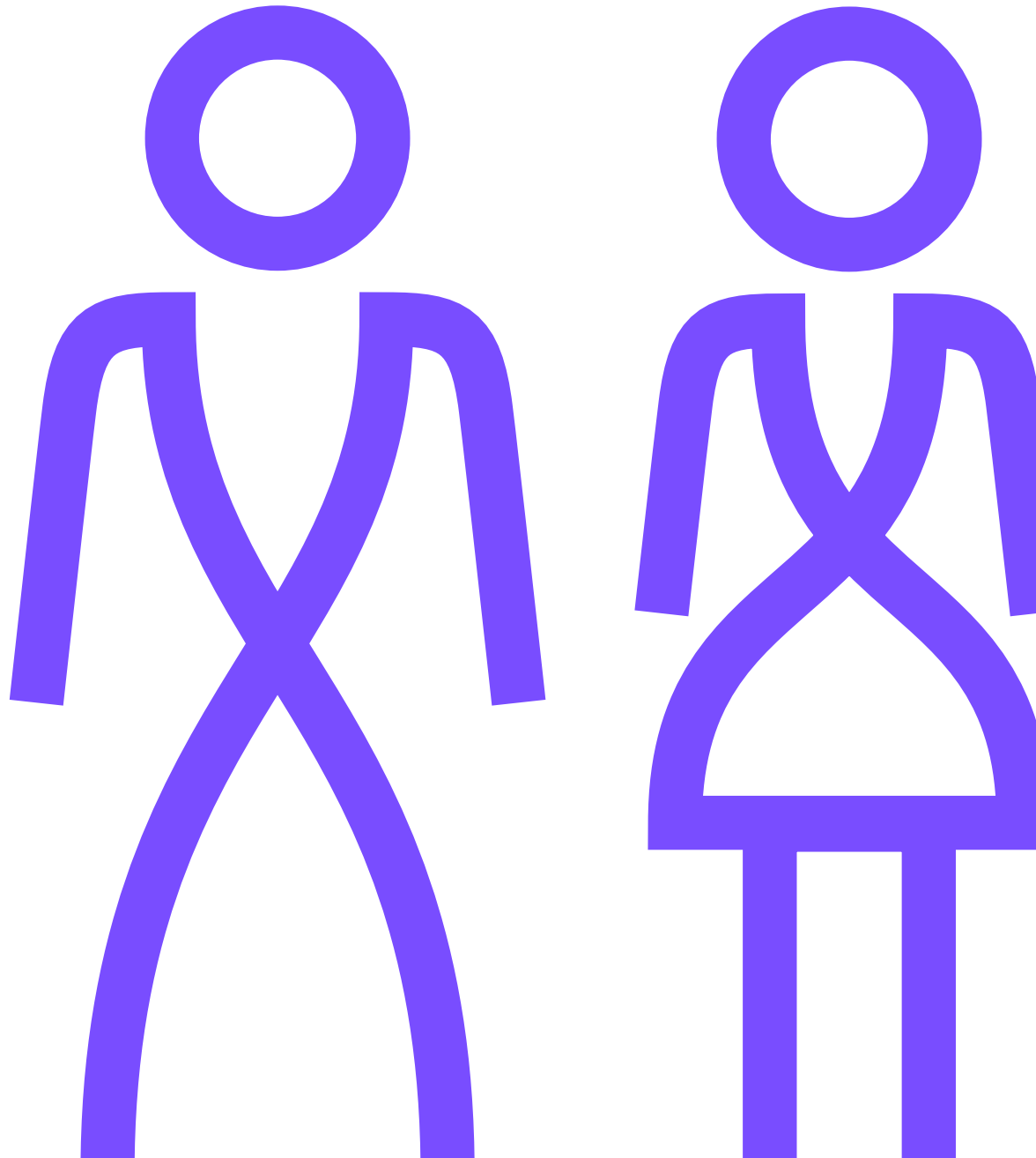
- a. Only me
 - i. Only user to mark notifications as "Done"
- b. Any user in my group (Recommended)
 - i. Any user can mark result as "Done"

SENDING AN INBASKET MESSAGE

1. Click on **InBasket** option on top Menu bar
2. **New Msg** will be located with a drop down arrow
3. Three options are available to send message
 - a. **Customer Service**
 - i. Message to be sent directly to Provider Support Team
 - b. **Upload Document**
 - i. Insurance card for patient
 - ii. Sent to Revenue Cycle for review
 - c. **Staff**
 - i. Message for other staff members enrolled on EpicCare® Link

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RIGOROUS SCIENCE, REVOLUTIONARY SOLUTIONS



**For help,
contact your
Cologuard
Representative.**

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