



# EpicCare Link (ChartLink)

## Quick Start Guide

Last updated 11/6/2025

Boston Medical Center  
**HEALTH SYSTEM**



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## Getting Started

ChartLink is a tool that provides real-time web access to patient information so you can access patients' clinical data and communicate with Boston Medical Center Health System to provide quality patient care. You can also use Chartlink to quickly refer patients to our organization.

ChartLink is a collection of different web pages, or activities, that correspond to different tasks. The activity that you use depends on what you want to accomplish.

This guide includes information to help you get started, such as browser requirements and how to log in.

## Help & System Requirements



### TRY IT OUT

1	<p>If you forget your password or cannot log in,</p> <ol style="list-style-type: none"> <li>1. If you have a bmc.org email, you can reset it at <a href="https://passwordhelp.bmc.org">https://passwordhelp.bmc.org</a> or call <b>617-414-4500</b>. <ul style="list-style-type: none"> <li>• If you do not have a bmc.org email you can ask your site administrator to reset your password</li> </ul> </li> <li>2. If you need support, email <a href="mailto:BMCHS_NetworkSupport@bmc.org">BMCHS_NetworkSupport@bmc.org</a></li> </ol>
2	<p>If you need to submit a help desk ticket, your help desk is likely going to ask for technical information. To find this information, go to <b>Settings → Session Information Report</b>.</p>
3	<p>You must use one of the following internet browsers to access Chartlink:</p> <ul style="list-style-type: none"> <li>• Google Chrome version 118 or later</li> <li>• Microsoft Edge version 118 or later</li> <li>• Mozilla Firefox version 115 or later</li> <li>• Safari version 17 or later</li> </ul>
4	<p>Chartlink requires a minimum screen resolution of 1024x768 pixels. We recommend that you use a high-speed Internet connection to achieve the best system speed and performance.</p>

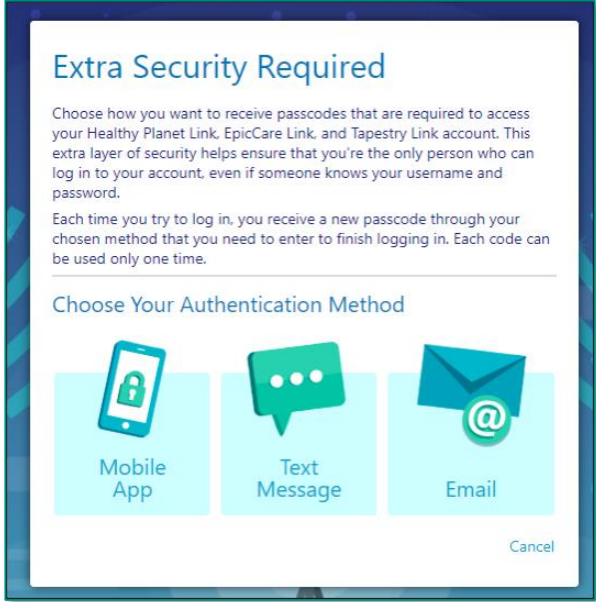
## Logging In



### TRY IT OUT

1	Use the link provided by your organization to access EpicCare Link.
2	Enter the user ID and password that you received for EpicCare Link.

	<ul style="list-style-type: none"><li>• If you have a bmc.org email, your username will be the first two letters of your first name and first six letters of your last name (Example: If your name is Kyle Johnson, it would be kyjohnso).</li><li>• If you do not have a bmc.org email, a numeric user ID would have been emailed to you</li></ul>
3	Enter your single-use passcode that you receive through your two-factor authentication method.
4	After you enter the passcode, optionally select the Remember me checkbox to indicate that you are using a device that is not shared with anyone else. This means you will not be asked for a passcode the next time you sign in from the same device for a while. Note that if you log in through a different device or browser, or your browser's settings are reset, you are still prompted for a passcode.
5	Two-factor authentication (2FA) is a process by which you verify your identity through a single-use passcode before you can access your account. This extra layer of security helps ensure that you are the only person who can log in to your account, even if someone knows your username and password.
6	When you first log in with your username and password, you are prompted to choose how you will receive these single-use passcodes.
7	<p>Choose how you want to receive 2FA passcodes. You can receive the passcodes through a mobile application, a text message, or email.</p> <ul style="list-style-type: none"><li>▫ Mobile application requires you to have access to a smartphone with an application like Microsoft Authenticator or Google Authenticator installed. These applications are free on the Apple App Store and the Google Play Store, but standard data rates apply.</li><li>▫ Text message requires you to have access to a cell phone with text messaging capabilities. Standard messaging rates apply.</li><li>▫ Email requires you to access your email at the same time as having the EpicCare Link website open.</li></ul>

	
8	Refer to <a href="#">Choose an authentication method</a> for more information on single-use passcodes.
9	<p>Refer to the appropriate section below for detailed steps about using each 2FA authentication method:</p> <ul style="list-style-type: none"> <li>• <a href="#">Set up mobile application 2FA</a></li> <li>• <a href="#">Set up text message 2FA</a></li> <li>• <a href="#">Set up email 2FA</a></li> </ul>

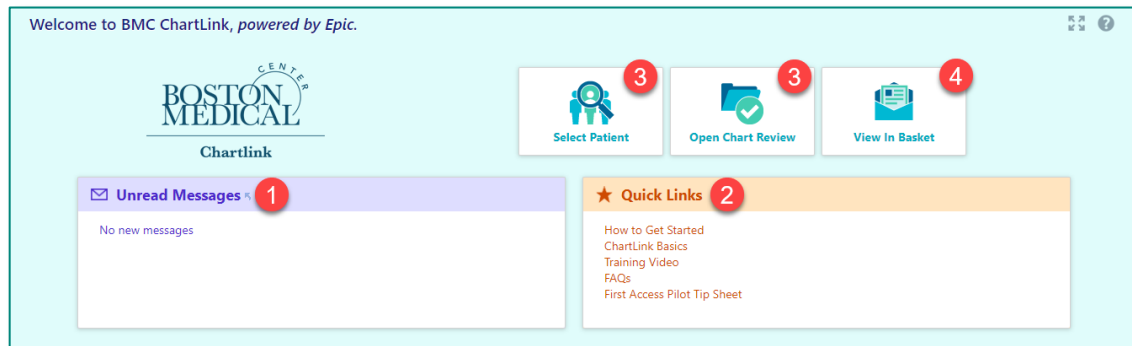
## Home



### TRY IT OUT

- |   |   |
|---|---|
| 1 | <p>Welcome to ChartLink! On your home screen, there are various components available to you:</p> <ol style="list-style-type: none"> <li>1. Unread Messages will show you a snapshot of your In Basket Messages that you have not yet read. Want to set up an In Basket tickler? Click here to find out how!             <ol style="list-style-type: none"> <li>a. Clicking on Unread Messages will jump you directly into the In Basket.</li> </ol> </li> <li>2. Quick Links offers support documentation including this quick start guide, FAQ's as well as the First Access tip sheet, which includes information on finding patients using three identifiers.</li> <li>3. Both the Select Patient and Open Chart Review will pop you over to the Patient activity. You will need three identifiers to search for new patients who are not on your list. Please reference the First Access tip sheet for more information.</li> </ol> |
|---|---|


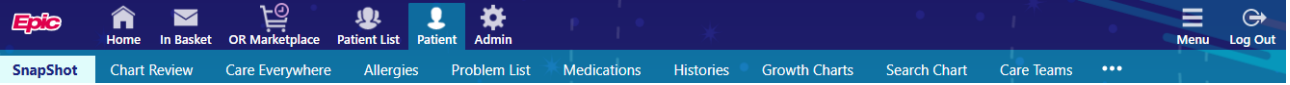


## 4. View In Basket will take you to your In Basket activity.



## Navigating EpicCare Link



### TRY IT OUT

- 1 When you log in to EpicCare Link, several sets of navigation tools appear at the top of the page:
 
- 2 Navigation Tabs: Use these tabs to open different activities in EpicCare Link. Each tab contains one or more related activities. For example, the **Patient** tab contains patient-specific activities. When you click a tab, the default activity for that tab opens.
 
- 3 Activity Menu: Use this menu to open the various activities that are contained in the selected navigation tab. For example, the **Patient** tab activity menu contains the **Allergies** and **Chart Review** activities.
  - If there are more activities than can fit on the screen, hover over the ellipsis on the far right of the menu to see all the activities contained in the tab.
  - You can also click  to pin an activity so it appears first in the menu. If you pin multiple activities, they appear in the order that you pinned them. Click and drag pinned activities in the menu to change their order.
- 4 Action Options: Use these buttons, located on the top right of the screen, to see all of your available activities, click Menu or to log out.
- 5 Click  **Patient** and go to the **My Patients** tab.
- 6 If you have access to many patients, your patients might appear on more than one page. Use the field at the top of the page to search for patients by their name (and two other additional identifiers):

PATIENT NAME	MRN	ID Type	Sex	DOB	Street Address	SSN	General PCP
Adttest, Michael	9000048		M	8/11/1987	100 Santa Ln, BOSTON MA 02116	xxx-xx-0000	Daniel Newman, MD
Adttest, Monday	8800146		F	6/5/1991	85747 Tuesday Dr, BOSTON MA 02119	xxx-xx-9809	Daniel Newman, MD

7 Double click a patient's name to open their chart.

- 8 When the patient's chart opens, you'll see different sections of the workspace:
1. This is the patient **storyboard**. The storyboard tells a little story about the patient. You are able to see their demographic information including name, age, sex, DOB. Did you know you can hover over the patients name to see more information? Give it a try!
  2. This is the default report, **SnapShot**. The SnapShot report give you just that, a SnapShot view of what is happening with your patient. It includes information such as current problems, allergies, immunizations, history and care team information. Notice you also have several other pinned reports that you can drill down into – Face sheet, Meds & Allergies, and so on.
  3. To dig deeper into the patient's record, you will use the **Activity tabs** along the top of your screen. Chat Review is likely where you will spend most of your time, reviewing the patient's chart. If you know you need to only see Medications, it may be easier to navigate specifically to the Medications tab. either way is perfectly fine and you will find the information you are looking for!
  4. If you see the **ellipses**, it is possible there are more menu items that were not able to fit onto your screen. Click the ellipses to see more activities.

**1** MA

**3** Snapshot

**2** Patient Snapshot

**4**

Michael Adttest  
Male, 37 y.o., 8/11/1987  
MRN: 9000048  
Language: Spanish

Search Chart

Daniel Newman, MD  
PCP - General

Allergies: Not on File

ACCESS ENDS  
2/23/2025

**Demographics**

Michael Adttest  
37 year old  
Legal sex: Male  
8/11/1987  
Comm Pref: [icon]

100 Santa Ln  
BOSTON MA 02116  
617-414-0000 (H)

**Significant History/Details**

Smoking: Never Assessed  
Smokeless Tobacco: Unknown  
Alcohol: Not on File  
Preferred Language: Spanish

**Family Comments**

None

**Care Team and Communications**

PCPs: Daniel Newman, MD  
Type: General

No other patient care team members

Recipients of Automatic ADT Notifications for Most Recent Admission  
[Show All Admissions](#)

No notifications found.

**Allergies**

Not on File

**Problem List**

2 items

Non-Hospital  
Cancer of overlapping sites of gastrointestinal tract  
Secondary malignant neoplasm of gastrointestinal tract

**Immunizations/Injections**

None

**Implants**

No implants to display

**Reminders and Results**

None

**Health Maintenance**

None

**Last 3yr**

Apr 20, 2023

Case Management with Care MGMT - Albano, M

9 Keep in mind, all activities and reports function the same so we will not cover every single one in this guide. Click [here](#) for a quick tutorial!

10 In Chart Review, there are additional embedded activities that we like to call **categories**. Looking for a note? Click **Notes**. Looking for a lab result? Click **Labs**.

Snapshot

**Chart Review**

Care Everywhere

Allergies

Problem List

Medications

Histories

Growth Charts

...

Chart Review - Loaded: 7, Filtered count: 7

Encounters

Surgeries

Anesthesia

Notes

Labs

Imaging

Cardiology

Procedures

Meds

LDAs

Consents

Media

Letters

Start Review

Refresh

Filters

Hide Admin Encs

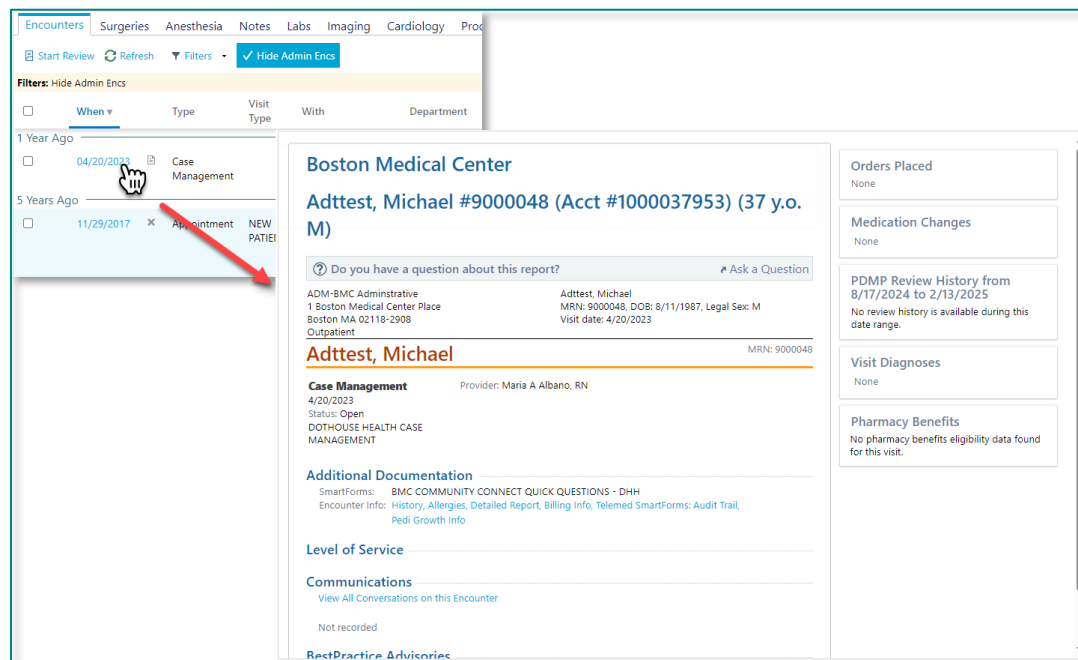
Information from other organizations

Filters: Hide Admin Encs

When	Type	Visit Type	With	Department	Description	Bookmark	Open/Closed	Reason for Visit
1 Year Ago								
04/20/2023	Case Management		Care MGMT - Albano, M	DHH CM			Open	

11 Once you are in a tab and you've found the information you are looking for, single click the hyperlink to see the report with detailed information:





- 12 The **Encounters** tab is all-encompassing, meaning it shows you everything that happened during that encounter with the patient. This includes notes, orders, medication changes, visit diagnoses, billing codes, flowsheet documentation etc. Navigating Chart Review is really a matter of preference. Some patients have a rich history or perhaps a complex encounter. This might mean finding the exact information in the encounter report might be complicated. If that is the case, use the other categories to find what you need. Looking for a specific Medication detail from that specific encounter? Try navigating to the **Meds** tab instead.

- 13 To get back, click **Back** in the bottom right of your screen:



















- 14 Take a few minutes to navigate through a patient's chart on your own.

- 15 If you've followed along, close out of the patient chart by clicking the **X** on the workspace:



- 16 Let us walk through finding a patient by **MRN** or **Name**.

- 17 Click  **Patient** and then click **Search All Patients**:

	<div>  Search My Patients          Search All Patients  </div>
18	Enter the patient's information, keeping in mind; <b>you must enter at least three identifiers</b> to find a patient. These forms of identification could be name (last name/first name), Date of Birth, MRN or SSN#.
19	<p>Once the system finds a match and you confirm it is in fact the patient you are looking for, click <b>Select</b>:</p> <div> <div> <b>Addtest, Michael - 9000048</b>  </div> <div>  Born 8/11/1987 (37 y.o.)            xxx-xx-0000   Male            617-414-0000 (H)   100 Santa Ln            santashelper@email.com            BOSTON Massachusetts 02116         </div> <div>  Select         </div> </div>
20	You are now brought into the patients chart and have the ability to do a full Chart Review, if necessary.
21	If you have followed along, close out of your patient's workspace.
22	<p>If needed, you can Create a New Chart for a patient that does not exist in our system:</p> <div>  Create a New Chart  </div>
23	<p>Complete the required fields, as indicated by red stop signs:</p> <div> <div> <b>Patient Create</b> </div> <div>           Name (Last, First)           <div>  </div> </div> </div> <p><i>Note: If you do not know their social security number while creating the chart, use all 0s</i></p>
24	<p>Click Create Chart:</p> <div>  Create Chart         </div>

## In Basket



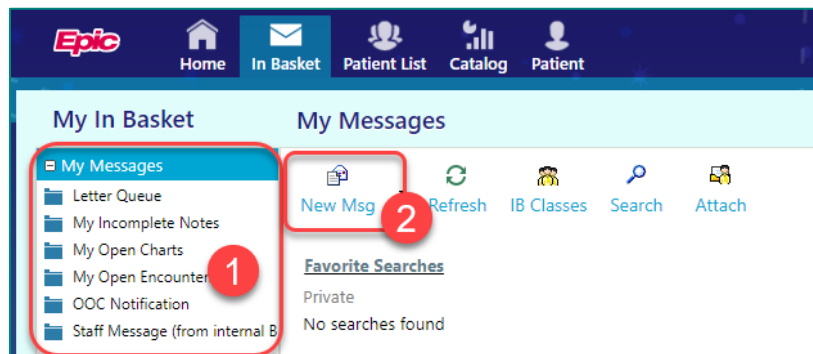
TRY IT OUT

1 Other navigation tools you may use include In Basket, Patient List, and Catalog. Let us jump into your **In Basket**.

2 What is In Basket? In Basket is Epic's communication hub, where you can send and receive messages.

3 In the In Basket, you have to main components:

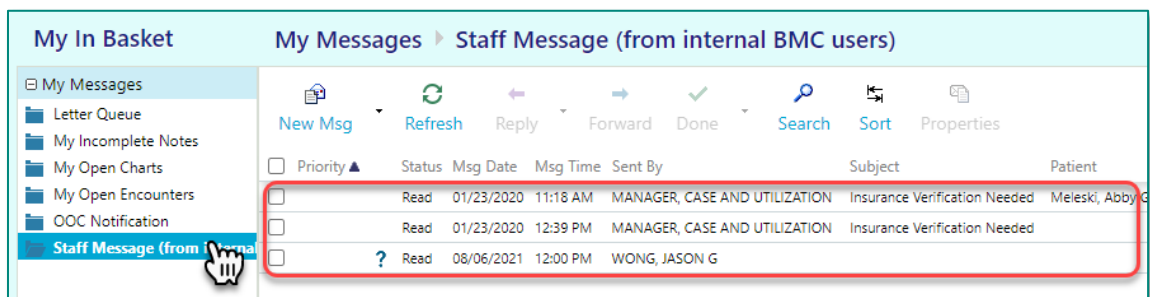
1. **In Basket Folders:** Depending on message type, messages will file into the appropriate folder. For example, messages between you and a BMC provider will appear in the Staff Messages folder.
2. **New Message:** This is where you can write a new message to communicate with another provider



4 Keep in mind; **it is unlikely you will see all of the message types** in the above screenshot.

5 In Basket works much like an email but it is internal to Epic. It is not to be used for time sensitive communications.

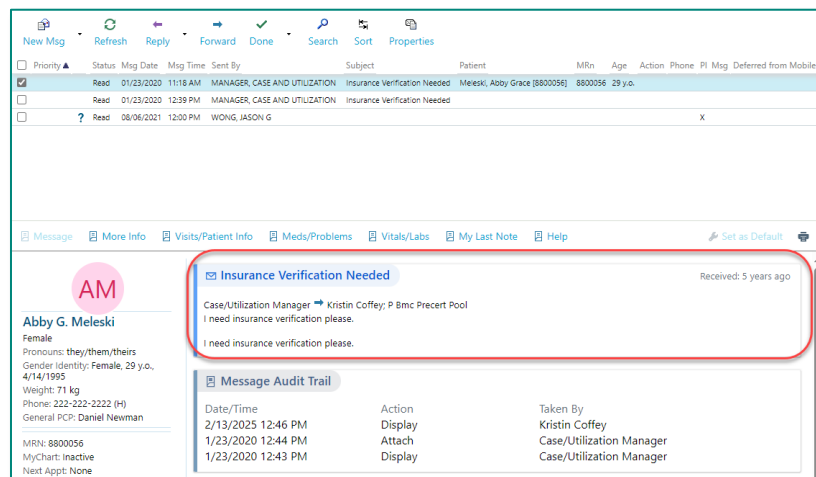
6 Once you click into a **Message Type**, all of your messages in that folder appear:



You are able to see information about the message, such as the status, message date, who it was sent by, what patient it is regarding etc.

7 Single click to read the message.

8 You are able to see the message in the bottom portion of your screen:



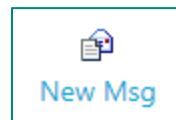
- 9 Just how you would reply to an email, if you would like to reply, click **Reply**. If you would like forward, click **Forward**. If you have addressed the message and consider it complete, click **Done**:



- 10 At the bottom of the screen, you are also able to see more information about the patient using the reports:



- 11 To create a new staff message, click **New Msg**:



- 12 Complete the fields as needed including:
- **To:** Whom the message is being sent to. This looks to a database.
  - **Subject:** Give your message subject so your recipient has a base understanding of what the message is regarding.
  - **Patient:** If the message is about a patient, pull the patient into this field. This is not required. A message can be sent that is not linked to a patient.
  - **Phone:** If there is a call back number or you are expecting the recipient to call back, enter that number in this field.
  - **Note:** Enter the content of your message.

13 Click **Send Message**.

14 Congratulations on sending your first In Basket Message!

## Patient List



TRY IT OUT

1 Let's jump over to **Patient List**:



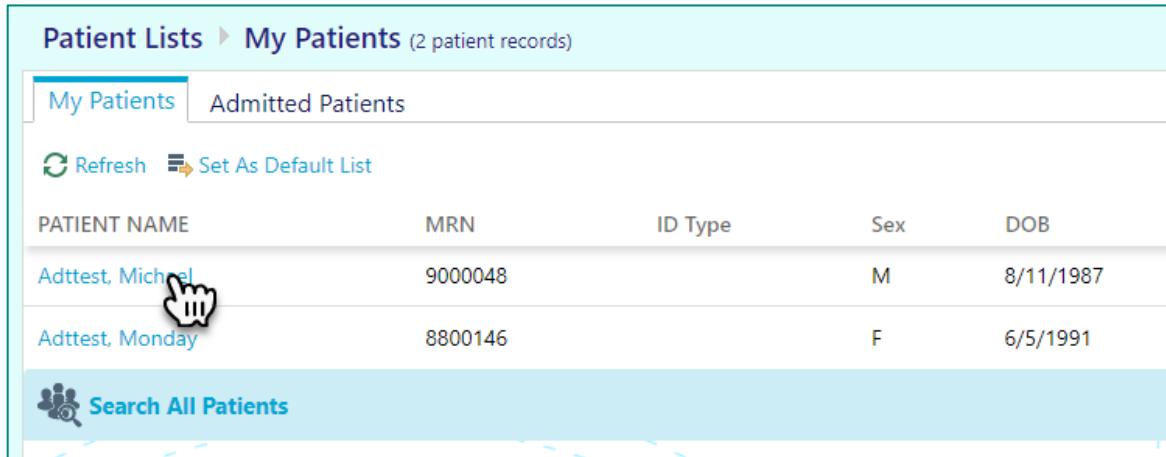
2 You'll be able to see **My Patients** and **Admitted Patients**:

Patient Lists ▶ My Patients (2 patient records)				
My Patients		Admitted Patients		
Refresh		Set As Default List		
PATIENT NAME	MRN	ID Type	Sex	DOB
Adttest, Michael	9000048		M	8/11/1987
Adttest, Monday	8800146		F	6/5/1991
Search All Patients				

3 **My Patients** will show any patient you have accessed or that is part of your care team.

**Admitted Patients** will appear when a patient linked to a provider in your group is admitted to a BMC hospital.

- 4 To jump into a patients chart, **click** the patients name:



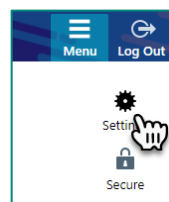
- 5 You are brought into **Chart Review** to do a full review of the patient's record, if necessary.

## User Settings



TRY IT OUT

- 1 Click **Menu** and open your **Settings**:



- 2 Three items to highlight:

1. **Notification Preferences:** This is where you can set up a ticker for In Basket Messages. What do we mean by that? Assuming you are not sitting in ChartLink all day waiting for messages, right? By updating your settings, we can send a notification to your email when you get a new In Basket message!
2. **Event Settings:** Adjusting these settings allow you to determine notifications you receive regarding your patient. For example, want to be notified if they are admitted? You can select those preferences here.

3. **Session Information Report:** Remember at the beginning of this guide we mentioned IT might request session information? Here is where you can gather that for further troubleshooting.

The screenshot shows the 'User Settings' menu with three sections:

- User Settings**
  - [Change Password](#): Change the password that you use to log in.
  - [Set Default Page](#): Choose the page that appears by default when you log in or select a patient.
  - [Reset Additional Authentication](#): Set up a new way to get passcodes.
- Event Monitor Settings**
  - [Event Settings](#) (2): Manage your Event Monitor settings.
- About**
  - [Copyright](#): View additional copyrights and legal notices.
  - [Session Information Report](#) (3): This report displays information useful for technical troubleshooting.

Callout 1 points to [My Demographics](#) and [Notification Preferences](#). Callout 2 points to [Event Settings](#). Callout 3 points to [Session Information Report](#).

### 3 Notification Settings:

The screenshot shows the 'Settings > Notification Preferences' page. It is divided into two main sections:

- Receive notifications for:**
  - Staff Message (from Internal BMC users): ☒ Email
  - Service Requests: ☐ Email
  - Community Message: ☐ Email
  - Outpatient Notifications:
    - Encounter After Check-Out: ☐ Email
    - Close Encounter: ☐ Email
    - Encounter Addendum Signed: ☐ Email
    - Note Signed: ☐ Email
    - Encounter After No Show: ☐ Email
  - Inpatient Notifications:
    - Admission: ☒ Email
    - Discharge: ☐ Email
    - HOV Confirm: ☐ Email
    - LD Newborn Admission: ☐ Email
    - Note Signed: ☐ Email
    - Note Addendum Signed: ☐ Email
    - Transfer to Inpatient: ☐ Email
- Receiving email notifications for:**
  - 2 message types at this email address
  - Enter email address:

### 4 Event Settings:

The screenshot shows the 'Settings > Event Settings' page. It includes an 'Event Filter' section with checkboxes for various event types:

- ED Notifications:**
  - ☒ ED Arrival
  - ☒ ED Arrival Cancelled
  - ☒ ED Discharge
  - ☒ ED Discharge Cancelled
  - ☒ ED Dismiss
  - ☒ ED Dismiss Cancelled
- Inpatient Notifications:**
  - ☒ Admission
  - ☒ Admission Cancelled
  - ☒ Discharge
  - ☒ Labor / Delivery Assessment
  - ☒ Newborn Delivery
- Outpatient Notifications:**
  - ☒ Visit Charting Completed
- Result Notifications:**
  - ☒ Imaging Results
  - ☒ Lab Result - Abnormal
  - ☒ Lab Result - Normal
  - ☒ Other Results

At the bottom, there is a 'Relationship Filter' section with radio buttons:

- ☐ All events for patients in my group
- ☒ Only events associated with my group (recommended)
- ☐ Only associations that I select

On the right, there is an 'In Basket Settings' section with radio buttons:

- ☐ Only me
- ☒ Any user in my group

#### **Recommended Settings**

PCPs: All events for patients in my group

Surgeons: Only events associated with my group

5

**Session Information Report:**

Settings > Session Information Report

Server process ID(s): poc-1475939, poc-1479377 (HISWeb)

**BOSTON MEDICAL CENTER POC-1475939** 2/13/2025 1:36 PM

**Non-Patient Specific Miscellaneous Reports**

NT - All Protocols (View Only)

**Additional Support Reports**

Show Support Reports Show Report and Print Group IDs  
Installed Special Updates Chart Review Settings  
Mobile Configuration

**Profile Compilation**

Note that any dynamic profile overrides are not considered here. They can be seen in the EpicCare Security section.

User Level Profile: None  
Sec Class Profile: Link Security Class (Partial Profile) [100000000]  
Department Profile: None  
Location Profile: None  
Serv Area Profile: Boston Medical Center Service Area Profile (Partial Profile) [0]  
System Defs Profile: System Definitions (Fixed Profile) [1]  
Compiled Profile: COMPILED:100000000-001 [226952]

**Compiled Profile Summary**

**Patient Encounter Workspaces**

**EpicCare Security**

**Basic Information**  
Default security class: 1100000010  
**Department Overrides**  
Department Security Class Restricted Access  
— — —  
**Profile Overrides**  
Encounter Department Encounter Type Profile  
— — —  
**User Departments**  
Primary department: EHS Secondary department: COMMUNITY  
PRACTICE [0101101]  
**Provider Options**  
Provider at Login Options Lock to linked provider [1]  
— — —  
**EpicCare Inpatient Security**  
**Basic Information**  
Default security class: 1100000018  
Inpatient documentation identifier: —  
**Department Overrides**  
Department Security Class Restricted Access  
— — —

**Template Linking Information**

**General**  
Currently applied: BMC EPICARE  
Linkable: LINK CLINICAL  
Template: STAFF TEMPLATE [700286]  
**Subtemplates**  
Subtemplate Applied? User Environment Subtemplate Environment  
BMC REPORTING ADMINISTRATOR SUBTEMPLATE [700454] Yes [1] — —  
DATA COURIER TEAM LEAD SUB-TEMPLATE [700450] Yes [1] — —  
**Subtemplate Defined Items**  
Defined Item Item Overrides By Item Appended By  
CLARITY DEFAULT SECURITY CLASS ADMINISTRATOR SUBTEMPLATE [29010] [700454] —  
RADAR ACCESS [33210] BMC REPORTING ADMINISTRATOR SUBTEMPLATE [700454] —  
DASHBOARD FRAMEWORK SECURITY CLASS [33300] BMC REPORTING ADMINISTRATOR SUBTEMPLATE [700454] —  
DATA COURIER - USER DATA COURIER TEAM LEAD SUB-TEMPLATE SECURITY CLASS [33300] BMC REPORTING ADMINISTRATOR SUBTEMPLATE [700454] —

## Placing Orders

**TRY IT OUT**

1

Select the **Patient** tab and click **Order Entry**:**Orders**

Order Entry

Order Review

2

Select an authorizing provider and click **Accept**:

**Select Authorizing Provider**


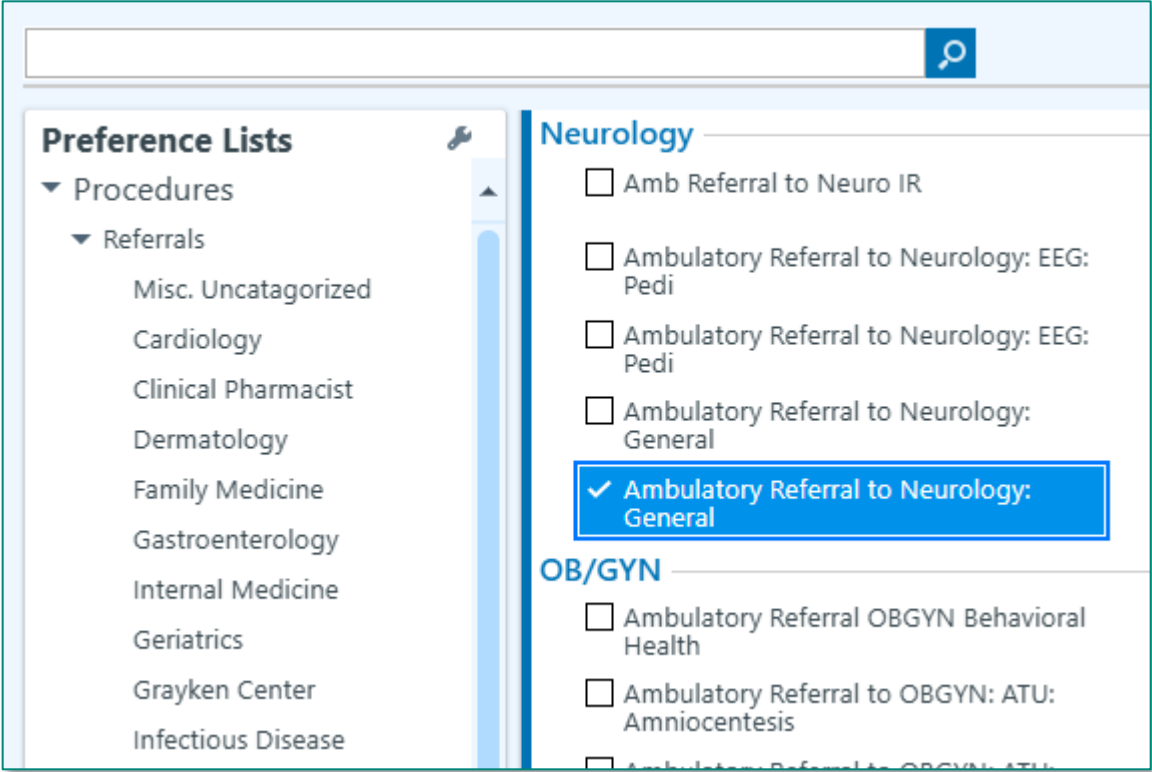



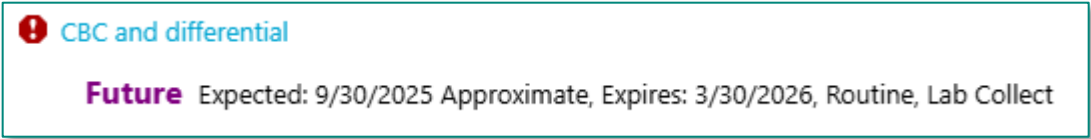
Chavez, Monica E, MD

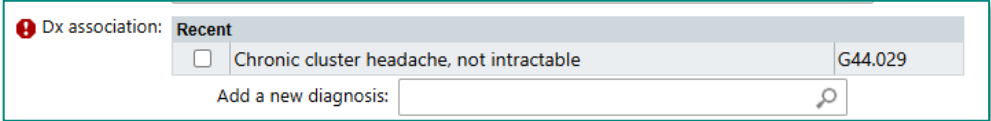
Chin, Larry E, MD

Weinstein, Joseph M, MD

Wilson, Nathan E, MD



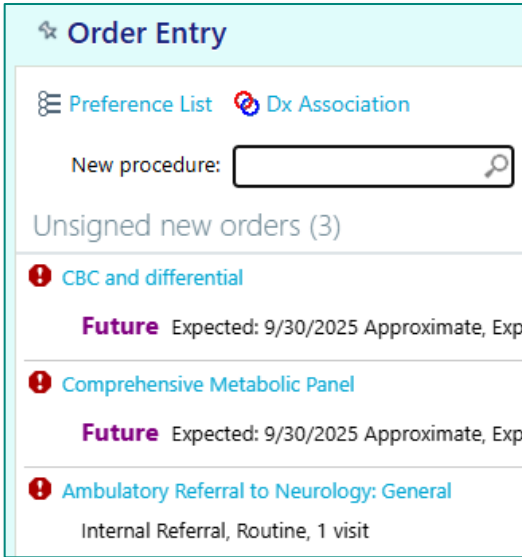
3	Click  <b>Preference List</b> to see a list of available orders.
4	<p>Select the check box next to each order that you want to place.</p> <ul style="list-style-type: none"> <li>○ Use the subsections in the left pane to filter orders by type.</li> <li>○ Use the search bar at the top of the activity to look up an order by its name. Click <b>Select And Stay</b> to select an order and continue searching for more.</li> </ul> 
5	Click  <b>Accept</b> to review a list of your orders and make any necessary changes before signing them.
6	<p>If there's a required () or recommended () icon next to an order, you can enter more information. Click an order's name to edit details like quantity or associated diagnoses.</p>  <ul style="list-style-type: none"> <li>○ For a procedure order, you can attach a file, such as a scanned image, to the order.</li> <li>○ To associate a diagnosis with a single order, either select the check box for a recent diagnosis in the <b>Dx Association</b> section or enter a new diagnosis in the <b>Add a new diagnosis</b> field and press <b>Enter</b>.</li> </ul>

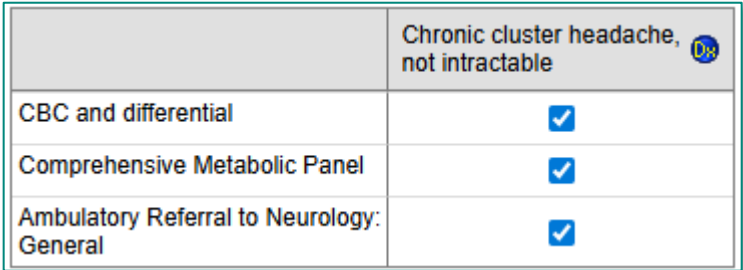
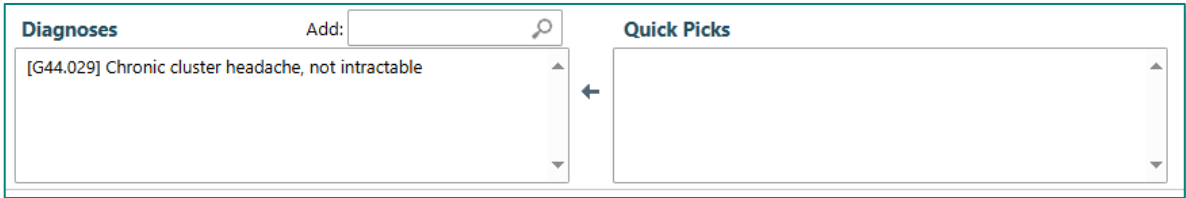
	
7	Accept and sign the orders.
8	If there's decision support associated with any of the orders, select a follow-up action and click <b>Accept</b> .
9	Enter your password if prompted and click <b>Accept</b> .

## Associating Diagnoses



### TRY IT OUT

1	<p>Associate all of the patient's orders with all of the patient's diagnoses by clicking Dx Association → <b>Associate All</b> on the Diagnosis Associate page:</p> 
2	Manually associate orders and diagnoses by selecting the appropriate check boxes:

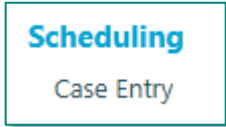
	 <table border="1"> <thead> <tr> <th></th><th>Chronic cluster headache, not intractable</th></tr> </thead> <tbody> <tr> <td>CBC and differential</td><td><input checked="" type="checkbox"/></td></tr> <tr> <td>Comprehensive Metabolic Panel</td><td><input checked="" type="checkbox"/></td></tr> <tr> <td>Ambulatory Referral to Neurology: General</td><td><input checked="" type="checkbox"/></td></tr> </tbody> </table>		Chronic cluster headache, not intractable	CBC and differential	<input checked="" type="checkbox"/>	Comprehensive Metabolic Panel	<input checked="" type="checkbox"/>	Ambulatory Referral to Neurology: General	<input checked="" type="checkbox"/>
	Chronic cluster headache, not intractable								
CBC and differential	<input checked="" type="checkbox"/>								
Comprehensive Metabolic Panel	<input checked="" type="checkbox"/>								
Ambulatory Referral to Neurology: General	<input checked="" type="checkbox"/>								
3	<p>Select a problem from the Quick Picks list, which includes the patient's problems and recently-used diagnoses, and click the left arrow (←) icon to add the problem as a diagnosis for the encounter:</p> 								
4	<p>Remove a diagnosis from the Diagnoses list by selecting the diagnosis and clicking the delete the selected diagnosis (➖) icon.</p>								

## Documenting a Case for Scheduling


Use Case Entry to create surgical or invasive cases to document information in an organized and discrete way, and reduce the need to clarify details with BMC over the phone.



### TRY IT OUT

1	<p>Select the <b>Patient</b> tab and click <b>Case Entry</b> (found under the <b>Scheduling</b> section):</p> 
2	<p>Select a patient from your list:</p>

**Patient Search**





 Search My Patients

Name or MRN


My Patients Recent

PATIENT NAME	MRN	ID Type	Sex
Optime, Panels	7010420		F
Referral, Noelle	9200703		F

3 Enter a location and a provider:

Patient:  Case ID:   
 Location:   Provider:    
 Start Date:   End Date:    
 ☐ Show past cases?

4 Click **+ New Case**.

5 Complete the following fields. A  icon indicates a required field.

- Date**
- Patient Class** - Select the appropriate admission status.
  - Bedded Outpatient
  - Emergency
  - Inpatient
  - SDC
  - Surgery or Procedure Admit
- Case Classification**
- Diagnosis**
- Procedure/Code**
- CPT Code**
- Laterality** (if needed)

Title	Num
Bedded Outpatient (PC)	123
Emergency (ED)	103
Inpatient	101
SDC	206
Surgery or Procedure Admit	209

6 Document other fields as needed.

7 To indicate the case is ready to schedule, go to the **Questions** form and complete the questionnaire:


Ready to Schedule?

## View or Modify an Existing Case

Use Case Entry to create surgical or invasive cases to document information in an organized and discrete way and reduce the need to clarify details with BMC over the phone.



### TRY IT OUT

1	Select the <b>Patient</b> tab and click <b>Case Entry</b> (found under the <b>Scheduling</b> section).
2	Select a patient from your list.
3	A list of the patient's cases appears. Use the <b>Location</b> , <b>Provider</b> , and <b>Date</b> fields to filter the list.
4	To open a case, select it from the list and click  <b>Open Case</b> .