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Access Related Questions

How do I request Access to Prism?

Prism Home Page: Provider should submit initial request for Prism access on behalf of clinic. From the Prism homepage select **Sign Up Now** and select user type (Provider). Once access for Provider is approved, access for delegates (Clinical Staff and Office Staff) can be requested from **Manage My Clinic** (See Below). If you have more questions regarding Prism Enrollment, please contact the Stanford Referring Provider Services Hotline at **1-866-742-4811**.

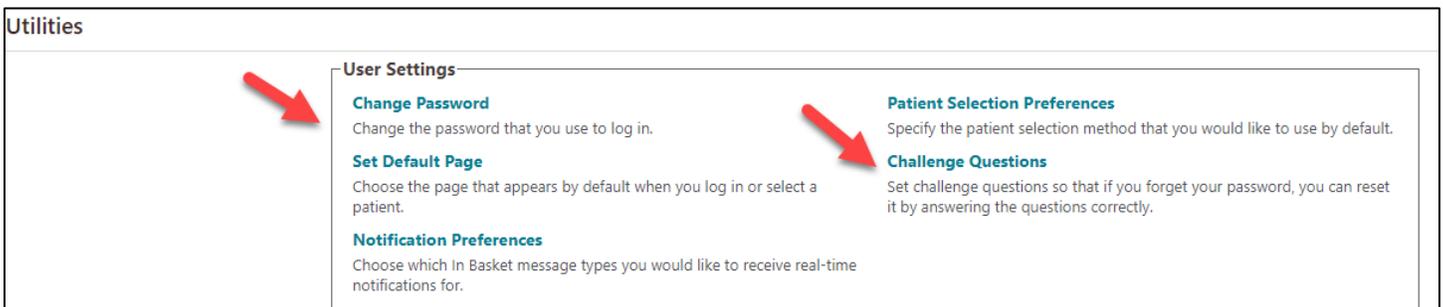
Manage My Clinic: Existing Prism users (Physicians/Site Administrators) can request access for delegate (Clinical Staff and Office Staff) users from **Manage My Clinic**. Manage My Clinic can only be accessed by Provider/Site Administrator and is available after Login from the Utilities Page.

I forgot my password, how do retrieve my password?

From the Prism homepage, select the **Forgot Password**. You will be prompted to answer security challenge questions (set by user). Once security questions are correctly answered, user can change password. *Note: If you don't 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 Prism account, from the homepage toolbar, click on the gear icon next the "Log Out" button. Select **Change Password** or **Challenge Questions**.



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

After your Prism account is approved for access, you will receive a Welcome Email with username and temporary password. If you try to copy and paste Username and/or password from email to Login and Password field on the homepage, sometimes the username/password is not accepted. 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.



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

Please call the SHC Service Desk at (650) 723-3333. We will need your information and new clinics details to further process any updates to your Prism account. Please note that not all clinics have access to Prism and/or eligible for Prism access. If your new clinic does not currently have Prism 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 Prism?

Prism 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.

How do I send messages to other Prism Users/Stanford Providers?

- 1) Login to Prism
- 2) From the toolbar select **In-Basket**
- 3) Select **New Message**
- 4) Enter Recipients name (last name, first name)
- 5) Compose Message and select **Send Message**

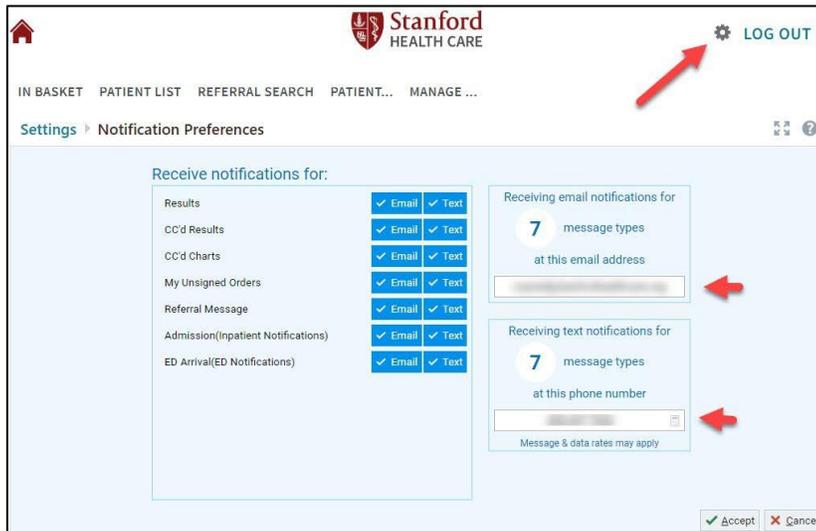
Notifications

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 Prism.

How do I turn on notifications (Email/Text) for new InBasket messages that I receive in Prism?

- 1) Login to Prism
- 2) Top right-hand side of the page, navigate to settings
- 3) Navigate: **User Settings > Notification Preferences**
- 4) Input your email and/or mobile
- 5) Opt-in on the type of notification you would like to receive



The screenshot displays the 'Notification Preferences' settings page in the Prism application. At the top, the Stanford Health Care logo and 'LOG OUT' button are visible. A red arrow points to the 'LOG OUT' button. Below the navigation bar, the 'Settings > Notification Preferences' breadcrumb is shown. The main content area is titled 'Receive notifications for:' and lists several notification categories, each with checkboxes for 'Email' and 'Text'. The categories and their notification options are:

Notification Category	Email	Text
Results	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CC'd Results	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CC'd Charts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
My Unsigned Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Referral Message	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Admission(Inpatient Notifications)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ED Arrival(ED Notifications)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

On the right side of the page, there are two input sections:

- 'Receiving email notifications for 7 message types at this email address' with a text input field and a red arrow pointing to it.
- 'Receiving text notifications for 7 message types at this phone number' with a text input field and a red arrow pointing to it.

At the bottom right, there are 'Accept' and 'Cancel' buttons.



Site Administration

What is the role of the Clinic Site Administrator?

Site Admins have the following two responsibilities:

Site Verification: Every 6 months, Providers/Site Administrators will be promoted to verify all users. If any users have left the clinic or no longer need access to Prism they should be selected as no longer active. Sites must be verified by admins every 6 months.

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

I accidentally deactivated a user; how do I reactivate the users Prism account?

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



Referrals

I am unsure of which Department / Department Specialty to select; how can I submit my referral?

Select “**Provider Relations**” as the Department and Department Specialty and your referral will be routed to our Provider Relations team of clinical navigators to route your referral appropriately. Be sure attach all relevant medical records and any other supplementary materials. Use the Notes section to describe the services you are seeking for your patient.

Can I send Referrals and Orders to SHC using Prism?

Yes, you can send referrals and orders electronically using Prism. See section below for general questions regarding referral or order entry process.

I do not see the location and/or specialty I am looking for as an available option in the referral despite finding the clinic on Stanford’s website, how can I submit my referral?

There is a select group of clinics that is not yet ready to receive referrals via the Prism portal. Please submit this referral via fax. For all other Stanford clinics – Fax #: (650) 320-9443.

How do I refer directly to a specific provider?

Simply include the name of the provider in the **Notes** section of the referral, and our New Patient Coordinators will ensure your patient is scheduled accordingly.

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

Please document this preference in the **Notes** section of the referral, and our New Patient Coordinators will ensure your patient is scheduled accordingly.

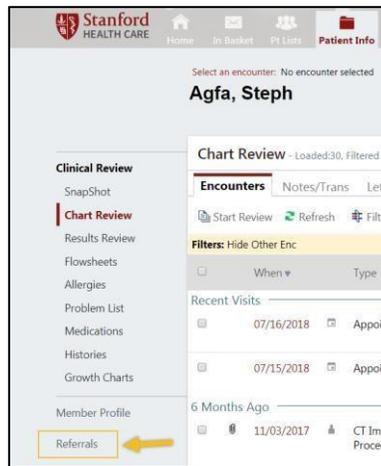
I created a referral in error, what do I do?

Add a **Note** to your referral with the words “Created in Error” in subject line, and our New Patient Coordinators will cancel the referral on your behalf

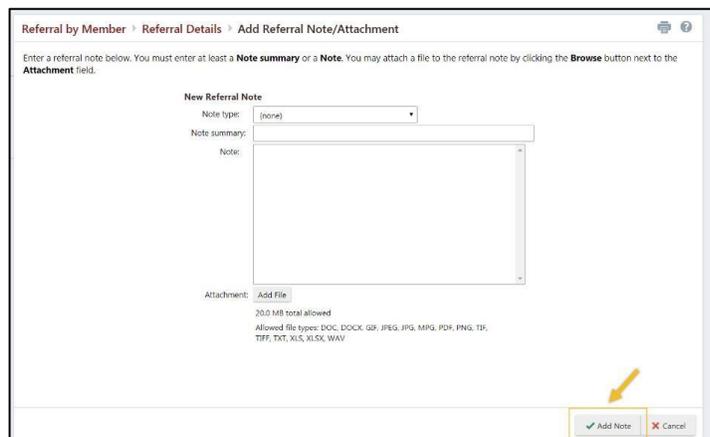
How do I append a referral with additional notes and/or attachments?

While you cannot edit a referral via the portal, you can always add new notes and attachments even after submitting the referral. To do so:

- 1) Navigate to the patient in question via your Patient List, and select **Referrals** in the left-hand menu pane.



- 2) Click **Referrals by Member** in the left-hand menu pane. Locate the Referral you would like to append and click the Referral Id #.
- 3) Click **Add Note/Attachment** at the top of the referral preview.
- 4) Select the **Provider Comments** Note Type, enter a Note Summary, Note, and Attachment (as needed).
- 5) Click **Add Note** in the bottom right



The screenshot shows the 'Add Referral Note/Attachment' form. The form includes a 'New Referral Note' section with a 'Note type' dropdown menu (set to '(none)'), a 'Note summary' text field, and a 'Note' text area. Below these fields is an 'Attachment' section with an 'Add File' button and a list of allowed file types: DOC, DOCX, GIF, JPEG, JPG, MPG, PDI, PNG, TIF, TIFF, TXT, XLS, XLSX, WAV. The form also includes a '20.0 MB total allowed' warning. At the bottom right, there are two buttons: 'Add Note' (with a checkmark) and 'Cancel' (with an X). A yellow arrow points to the 'Add Note' button.



Order Entry FAQ (Prism only)

Note: At this time, the order entry feature is limited to Prism users. For Affinity providers, please continue to submit orders via fax.

What is Order Entry?

Order Entry is a functionality within Prism that allows community physicians to electronically submit laboratory and radiology orders through the Prism 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 Prism **Create a referral** option instead.
- Laboratory orders including specimen collection orders at Stanford Health Care (SHC)

What if I can't find the specific order I'm looking for?

It is likely that the procedure you are looking for was purposely excluded from being orderable via Prism. If a provider needs to place such an order, submit a **Requisition Order** as per usual practice, such as through Fax.

Why can't I sign the order?

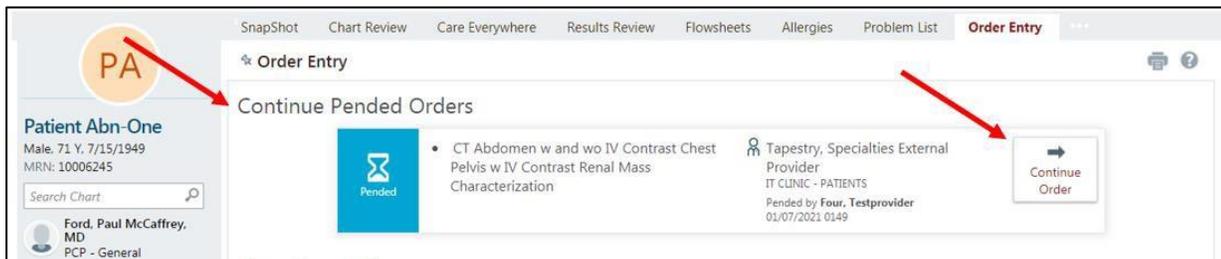
Only providers have the ability sign orders. Other clinical staff can only **Pend Orders** for signature.

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. Physicians are notified of any unsigned, pending orders after 24 hours, but clinic staff are recommended to inform providers of any pending orders to ensure timely submission.

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 can happen when I do this?

This access is only available to Prism/PlanLink providers. Signing the order completes the ordering process and sends the order to Stanford. Be sure to resolve all warnings.

How can I sign only one of the orders?

Prism currently only supports order signature for the entire encounter. We recommend you remove Abn 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.

Order Name	Order Date	Order Status	Authorizing Provider	Ordering User	Appt Status	Order Info	Submitter
<input type="checkbox"/> XR 36in Leg Length and Alignment	08/31/2022	Active	Four, Testprovider	Testprovider Four	Appointment Needed	Expected: 08/31/2022	
<input type="checkbox"/> CBC w/o Diff	08/31/2022	Active	Four, Testprovider	Karla Test			XRRESEARCHDEMO
<input type="checkbox"/> Metabolic Panel, Basic	08/29/2022	Completed	Four, Testprovider	Will Test		Last Verified: 8/29/2022	XRRESEARCHDEMO



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

Radiology Orders

In order 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 Order** screen. Information is below (see Quick Start guide for additional details).

CT Abdomen w and wo IV Contrast Liver Triphasic Chest Abdomen Pelvis w IV Contrast S/P Chemo Embolization

Status: Normal Standing Future

Expected Date: Today Tomorrow 1 Week 2 Weeks 1 Month 3 Months 6 Months

Expires: 1 Month 2 Months 3 Months 4 Months 6 Months 1 Year

Priority: STAT Expedite Routine Timed

Class:

Below is a list of order classes that can be used. Please do not select an order class that is not on this list.

Order Class	Location(s)
Stanford [50]	Any SHC Imaging Services Outpatient Location
Hosp Performed [22]	Anything within the SHC hospital (such as ED)
ValleyCare Outpatient [88]	Hosp <ul style="list-style-type: none"> Stanford Health Care ValleyCare Livermore (1133 E. Stanley Blvd., Livermore CA 94550) Stanford Health Care ValleyCare Pleasanton (5555 W. Las Positas Blvd., Pleasanton, CA 94588) Women's Imaging Center, Stanford Health Care ValleyCare Pleasanton (5725 W. Las Positas Blvd., Pleasanton, CA 94588)
Imaging San Jose [92]	Stanford Medicine Imaging and Express Care (798 S. Winchester Blvd., San Jose, CA 95128)
Pleasanton CT [95]	Imaging Pleasanton (5725 W. Las Positas Suite 100, Pleasanton CA 94588)
Menlo [51]	Menlo Medical Clinic <ul style="list-style-type: none"> 1300 Crane St., Menlo Park, CA 94025 321 Middlefield Ave, Menlo Park, CA 94025
Bay Valley [75]	Bay Valley Medical Group <ul style="list-style-type: none"> 27212 Calaroga Ave., Hayward, CA 94545 319 Diablo Road, Ste. 105, Danville, CA 94526
AMG San Pablo [93]	Alliance Medical Group (100A San Pablo Towne Center, San Pablo, CA 94806)



Laboratory Orders

To ensure proper routing, all lab orders available in Prism are defaulted to **Resulting Agency = SHC Lab**. At this time, only SHC Labs are available to receive orders via Prism.

CBC w/o Diff

Lab: Resulting agency: SHC LAB [14] 

Collection date:

Collection time:

Status: Normal Standing Future

Release: Auto Manual Interval: Count:

Expires: 1 Month 2 Months 3 Months 4 Months 6 Months 1 Year

Class: Lab Collect Clinic Collect

Priority: Routine STAT

Comment:

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.

Why hasn't a radiology order been scheduled?

It's possible that the order was never completed, i.e. 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.

Appropriateness rankings for a 71 year old male
Indications: Palpable nodule or thyroid enlargement

Appropriateness	Procedure	Cost	RRL
1	CT NECK W IV CONTRAST	\$\$	▲▲▲▲▲
Alternate Procedures to Consider			
9	US HEAD NECK SOFT TISSUE	\$\$	
9	US THYROID	\$\$	
4	NM THYROID IMAGE UPTAKE	\$\$	▲▲▲▲

Click here for ACR Appropriateness Criteria reference information

Apply the following changes:

- Remove CT Neck w/IV Contrast Expected: 1/7/2021, Expires: 1/7/2022, Routine, Stanford, Reason for Exam: Palpable nodule or thyroid enlargement Score 1
- Add Score 9 (US Head Neck Soft Tissue)
- Add Score 9 (US Thyroid)

Continue with no changes

What is the 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 Prism 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.

Order Entry > Order Validations

Information Needing Your Attention

ABN Alert: Medicare does not recognize selected DX as medically necessary for procedure or medication. If no action taken, your patient will likely be responsible for paying out-of-pocket.

CT Head wo IMGCT0208 This procedure is not covered for an associated diagnosis. ▲ Details

Failed Charge(s)	Failed Diagnoses	Failed Rule Sets
CT HEAD/BRN C-MATRL [70450 (Custom)]	G44.201	Professional Fees Not Covered

Associated diagnoses

Tension-type headache, unspecified, intractable [G44.201]

Payor/Plan: Medicare/Medicare Part A&B (Hosp And Medical) ABN Status: Notice Triggered

Attached Advance Notice Waiver form



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

In order 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). See example below:

The screenshot displays the Epic ABN warning interface. On the left, the 'Information Needing Your Attention' section contains an 'ABN Alert: Medicare does not recognize selected DX as medically necessary for procedure or medication. If no action taken, your patient will likely be responsible for paying out-of-pocket.' Below this, a table lists failed charges, diagnoses, and rule sets. A red arrow points to the 'Attached Advance Notice Waiver form' link. On the right, the 'Advance Notice Form' is displayed, including patient information, a table of items and services with reasons Medicare may not pay and estimated costs, and three options for the patient to choose. A red arrow points to the 'Print' button at the bottom right of the form.

Items or Services	Reason Medicare May Not Pay	Estimated Cost
11 CT HEAD W/O IV CONTRAST	11 This type of service is not covered for non-covered diagnoses.	11 \$6,706.00

Failed Charges	Failed Diagnoses	Failed Rule Sets
CT HEAD/BRN C-MATRL [70450] (Custom)	G44.201	Professional Fees Not Covered



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".



Specimen Collection (Prism 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.

I would like to send specimens to Stanford labs, how can I request Specimen Collection access for myself and for my clinic?

If you are a new Prism 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 Prism 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 Prism username and password first before specimen collection access becomes available.

I now have Specimen Collection access, how do I collect and send specimens to Stanford labs?

Navigate to **Order Review**, search for the patient and the lab of interest, and click on **Collect Specimens**. Refer to the User Guide for a step-by-step guide.