

SCOTTISH RITE



CareEverywhere Instructions

If your organization has given you access to CareEverywhere, you can utilize this functionality to access clinical information from Scottish Rite for Children. When establishing an initial CareEverywhere link with Scottish Rite, you must be in an open encounter at your organization. The encounter type must be one that your organization has authorized for **CareEverywhere** querying (i.e. outpatient appointment, admission or notes only encounter).

1. From the open encounter, navigate to your **CareEverywhere** activity (this may be displayed as an activity tab or found under the **More** button), then select **Request Outside Records**.
2. Scottish Rite may already be linked to your patient. If not, select **Query New Organization**, type **Scottish Rite for Children**, select it and enter your Epic password if prompted.
3. If a matching patient record is found, it appears. Demographic information is highlighted so that you can verify patient details before proceeding. If a result isn't an exact match, you might need to contact Scottish Rite.
 - If you've found the correct patient, click "**✓ Yes - Correct Patient**".
 - If the wrong patient appears, click "**✗ No - Incorrect Patient**".
 - If no match is found, please call the Scottish Rite for Children Help Desk at 214-559-8347.
4. Now, your patient is linked with Scottish Rite! You can access finalized information such as clinical summaries, office visits and test results.
5. To request an update to your query results, navigate to your **CareEverywhere** activity and select **Request Updates**. Scottish Rite does not require that you be in an active encounter to perform an update. However, your organization may have this requirement.

Helpful Hints

- » When opening an encounter available through **CareEverywhere**, you may need to click a hyperlink titled [view related clinical summary](#) to view complete information.
- » If your organization allows viewing linked patients through **Chart Review**, a **CareEverywhere** icon will appear designating linked information. **CareEverywhere** results can be toggled off and on using the CareEverywhere button.

