

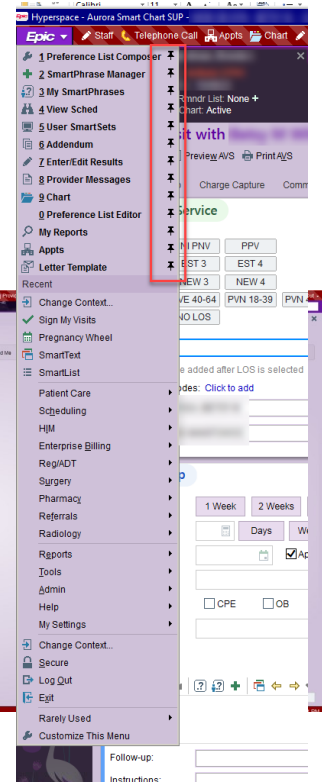
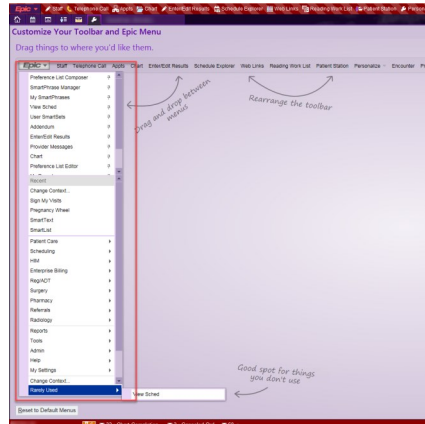
Personalization

Big Epic Button



The wrench in the top red bar will let you place shortcuts from the Epic button on to your top bar. Good options for clinicians: Staff (to send reminders), Telephone Call (to start a new telephone encounter), Chart (to review), Enter/Edit results (if you frequently do this), Web Links (if you want to get in to UpToDate from your home computer). Other items that you use can be "pinned" to the top of the dropdown menu. Other items that you rarely use can be put in the rarely used folder.

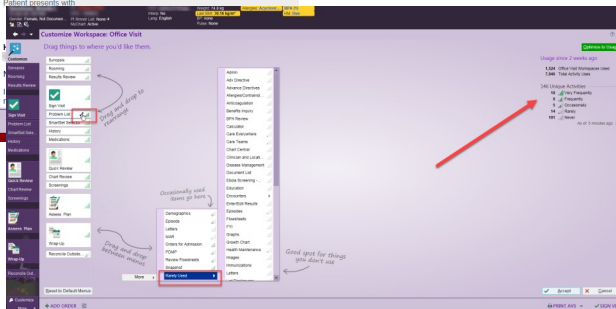
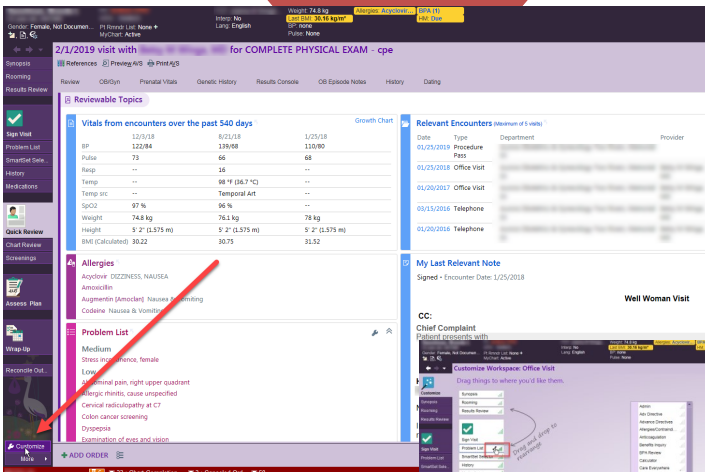
Hint: it's easy to click on a button, and if you have to open a menu to find something, the shorter and cleaner it is, the quicker to find what you need.



Navigator Activities

Within each navigator, you can adjust the left side-bar menu. You can have which buttons show, if they're fat or thin (not applied to all buttons), and for the activities that you don't use, put them in rarely used. The system also has information on the right-hand side of the page about what activities you use the most.

Hint: This has to be done for each type of encounter (office visit 1, telephone encounter, post-op, ob check, etc). This is why we want to limit the number of navigators that you use.



Within an Activity

Sometime, they can be tricky and hide the wrench in the symbol for the drop down menu. You can arrange the order of the activity in to what works best for you.

Hint: you cannot move an activity from pane to pane, you can only adjust order within a given pane.

Notes Section

Wrap-up Section

You can make buttons for your common LOS, time for next follow-up, and reason for follow-up

You can make buttons for the most common note templates that you use.

Hint: name them something short and sweet, that you'll remember, to save space and keep it tidy.

Pre-Charting. What can and cannot be done...

You can...

- Review and edit problem, including A/P notes
- Review and add visit diagnosis
- Review and refill or d/c any meds (just don't sign your cart until the patient is seen and those actions are confirmed)
- Start a progress note, H&P, or procedure note—can use all of your normal tools
- Reconcile Outside Information
- Please new orders (imaging, labs, medications) - again, do not sign until the patient is seen and the need for these are verified
- Review BPAs

You cannot...

- Place LOS
 - Place a f/u recommendation
 - Insert patient instructions
- (essentially, you can't do anything that will indicate to the system that the patient is arrived and checked in)

Q. Why should I spend my time pre-charting. How could it possibly help me?

A. You can likely get a lot more done in 30 minutes of focused, uninterrupted time than during any amount of time in the middle of clinic. Clinic brings a lot of distractions...patient questions, peer comments, nursing questions, phone calls, emails, etc. Getting yourself prepped and set up for the day will allow the day to run more smoothly once you're in the middle of it. Additionally, reviewing your schedule before will allow you to have staff make adjustments as needed to ensure a smooth day.

Chart Review

Chart Review

Notes/Trans | Imaging | Lab | Medications | Encounters | Procedures | Surgeries | Consents | Media | Cardiac Dx | Letters | Episgdes | Other Orders | Misc Reports | LDAs

Refresh (1:36 PM) | Add to Bookmarks | More

Filters: Exclude Me Obstetrics Gynecolo... Aurora Obstetrics G... Consult Notes Procedure Notes Provider Notes Adv Dir Notes ob

Department Specialty contains...

Department Specialty	Count	Last Date
<input type="checkbox"/> Emergency Medicine	9	08/29/2017
<input type="checkbox"/> Family Practice	10	10/09/2018
<input type="checkbox"/> Laboratory	1	09/16/2013
<input type="checkbox"/> Neurology	19	07/31/2018
<input type="checkbox"/> Obstetrics & Gynecology	49	12/01/2017
<input type="checkbox"/> Ophthalmology	15	11/09/2018
<input type="checkbox"/> Orthopedics	11	01/25/2017
<input type="checkbox"/> Rehabilitation Services	8	01/18/2017
<input type="checkbox"/> Surgery	6	12/28/2016
<input type="checkbox"/> Urgent Care	24	06/18/2017
<input type="checkbox"/> <Unknown>	13	11/18/2016

Save this Filter for Quick Access Later
Select filter criteria or apply a quick filter for options to save.

Date of Service	File Date	Type	Author	Encounter Type	Cosigner
Recent Visits					
11/09/2018	11/09/2018 10:28	Progress Notes		Office Visit	
11/09/2018	11/09/2018 08:43	Progress Notes		Office Visit	
10/09/2018	10/09/2018 13:34	Progress Notes		Office Visit	
10/09/2018	10/09/2018 12:59	Progress Notes		Office Visit	
6 Months Ago					
07/31/2018	07/31/2018 10:00	Patient Instructions		Office Visit	
07/31/2018	07/31/2018 10:06	Progress Notes		Office Visit	
07/31/2018	08/07/2018 08:05	Progress Note/Visit Note		Office Visit	
04/26/2018	04/26/2018 14:13	Progress Notes		Office Visit	
04/26/2018	04/26/2018 13:51	Progress Notes		Office Visit	
1 Year Ago					
01/11/2018	01/11/2018 09:41	Patient Instructions		Office Visit	
01/11/2018	01/17/2018 18:20	Progress Note/Visit Note		Office Visit	
12/01/2017	12/01/2017 14:30	Progress Notes		Office Visit	
12/01/2017	12/01/2017 12:47	Progress Notes		Office Visit	
10/05/2017	10/05/2017 15:15	Progress Notes		Office Visit	
10/05/2017	10/05/2017 09:42	Patient Instructions		Office Visit	
10/05/2017	10/09/2017 12:32	Progress Note/Visit Note		Office Visit	
09/14/2017	09/14/2017 11:09	Telephone Encounter		Telephone	

Tips:

- 1) **Use Filters.** You can filter any of the tabs by a plethora of options. You need to take 10 minutes to play around with it to see what works for you. Examples: all encounters associated with a given diagnosis; all medications every prescribed from a certain pharmaceutical class; all the lab results for a specific lab. Click the filter button to make that window appear and disappear
- 2) **Personalize (the wrench).** You can change what order the tabs are in, and the first tab will be the default that the window opens to every time. You can change the color coding on the tabs. You can adjust the short-cuts to filters.

Remember, the most useful box in the world...

Chart Search

This box will search a patient's chart for anything that has that given word. For instance, in this case I searched hypertension. The results are going to be any progress notes with the word hypertension anywhere in them, any labs ordered with an associated diagnosis of hypertension, any medications with an associated diagnosis of hypertension, and procedures associated with hypertension, etc. Any document that can be "read" by Epic will show up.

Hint: What will not show up? Documents that have been scanned in to Epic, usually under the media tab. Those come in as a picture, therefore are unable to be "read" by the search engine.

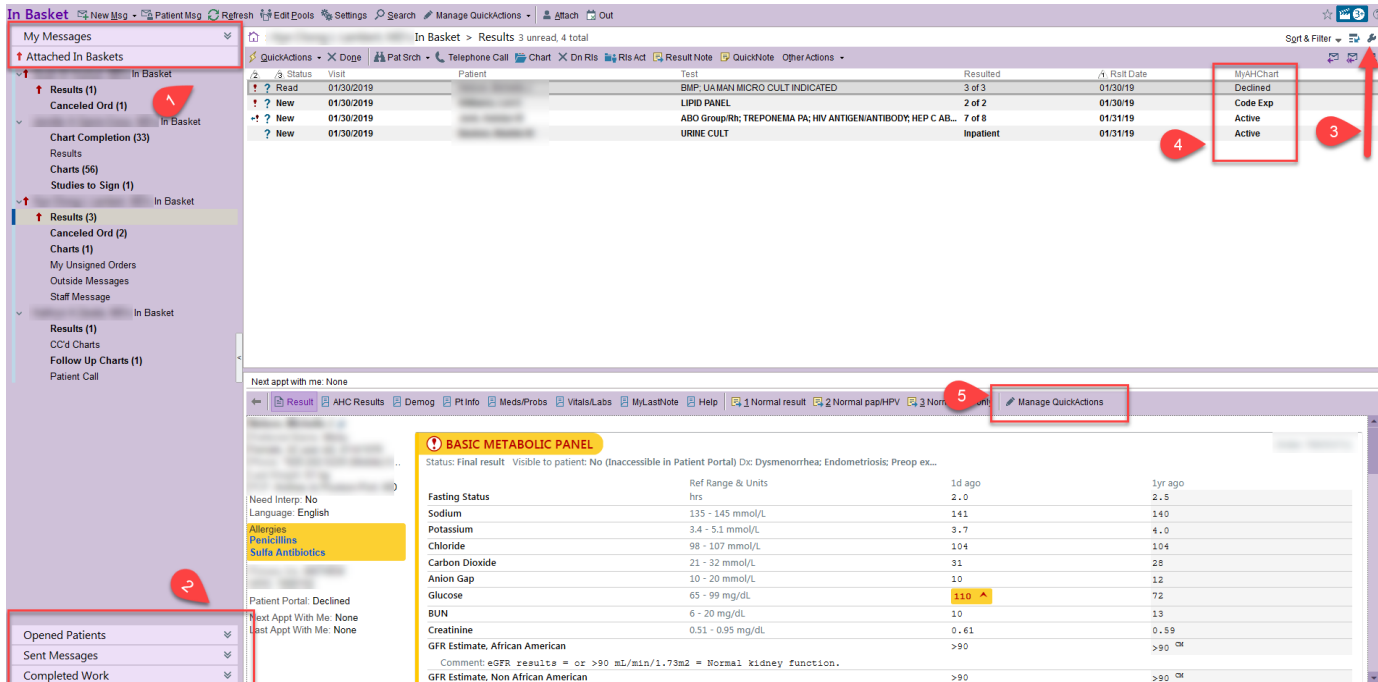
The screenshot shows the Epic EMR interface with a search window open. The search term is "hypertension". The results are organized by year:

- February 2018**
 - Progress Notes by [redacted] 2/15/2018
.. BP 100/70 | Pulse 76 | Ht 5' 5" (1.651 m) | Wt 64 kg
- 2017**
 - Telephone Encounter by [redacted] 3/24/2017
.. Cholesterol is ok at this point
 - LIPID PANEL WITH REFLEX Collected 3/23/2017
 - CHOLESTEROL 193
 - CALCULATED LDL 110
 - HDL 74
 - TRIGLYCERIDE 43
 - CALCULATED NON HDL 119
 - CHOL/HDL 2.6
 - Includes: Additional Results (1)
 - GLUCOSE LEVEL Collected 3/23/2017
Includes: Additional Results (2)
 - THYROID STIMULATING HORMONE REFLEX Collected 3/23/2017
TSH 1.459
- 2015**
 - Progress Notes by [redacted] 10/8/2015
.. BP 122/64
- 2014**
 - Progress Notes by [redacted] 11/3/2014
..Respiratory: shortness of breath
- 2013**
 - Progress Notes by [redacted] 7/8/2013
..Respiratory: shortness of breath

The search window has tabs for "All (10)", "Notes (6)", "Labs (4)", "Meds", and "More (0)". The "All (10)" tab is selected. The search window also has a "Search" button and an "Off" button.

1:44 PM

In-Basket Management

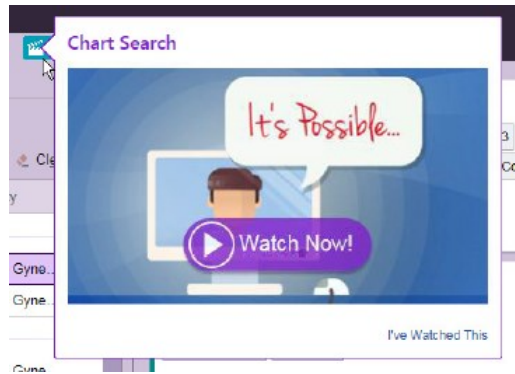


There are so many things to say about the in-basket, so in order to not overwhelm, we'll just provide a few key tips:

- 1 & 2) Use the tabs on the left side of the screen to navigate between your inbasket, any in-baskets you are attached to, and your sent/completed work.
- 3) Use the wrench. First, click "report on bottom." That will orient you in the manner that the above photo shows. This is a much better configuration for a laptop. Then, you can play around with various setting to show or hide different columns. Only show the ones that you need—it's easier to see things in a less-muddled page.
- 4) Example of a useful column. Shows the patient's myChart status.
- 5) Quick actions can help you be more efficient with repetitive result notes.

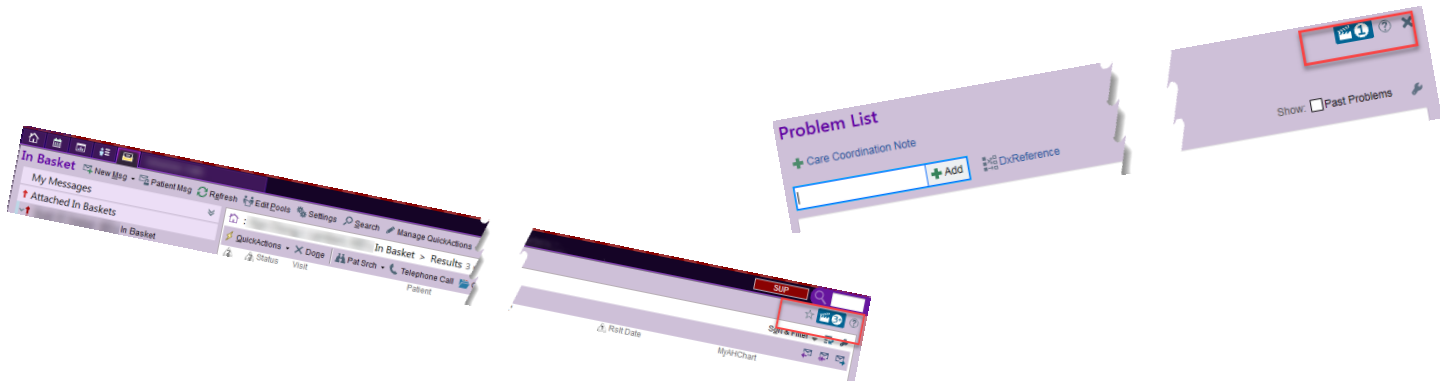
Hint: Each section of the in-basket will need to be adjusted as noted above. That means, until you have something in your "co-sign charts" folder, you cannot set it to show "report on bottom." There is no "apply all" button. Each folder is individualized. Check out the wrench in each folder to make it the most efficient for you.

"It's Possible"
A Great Way to Learn



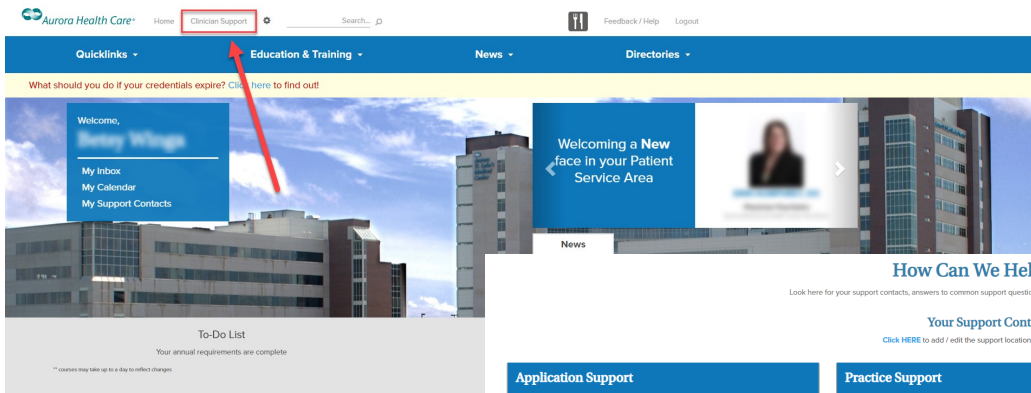
Take 30 seconds to watch and learn.

You could be surprised...



Where to Find Extra Help

Step 1: go to the Portal and click “Clinician Support”



Step 2: Click on “Tip Sheets” at the bottom of the page



Step 3: Select the appropriate category of Tip Sheets.

Step 4: Search with key words for any applicable Tip Sheets. Push CTRL+F, then type in the key word.

Hint: There are directions at the top of the page if you forget how.

