Medicine Provider Quick Guides

1. **General Overview:**
   - Login in using your CHS **User ID** and **Password**
   - Select your **Department**
   - Find patients on your **Schedule** tab (Office Visits and scheduled Inpatient Procedures)
   - Find patients in **Patient Lists** tab (Inpatients and scheduled Procedures)
   - Add patients by looking in **Available Lists** or going to **Patient Lookup**

2. **Admission:**
   - Use **Admission Navigator** and follow all the steps as listed.
   - Complete **Medication Reconciliation**.

3. **Rounding:**
   - Find your patients on **Patient List** under **My Patients** or **My Group/Team**
   - Print out a patient list if desired
   - Use **Chart Review**, **Notes**, and **Orders** tabs to do most of your work.

4. **Consults:**
   - Find your consults in the **Patient List** tab under **Available Lists** and drill down to **New Consults – Specialty**
   - Associate your **Consult Note** with the **Consult Order**.
   - Order a consult by placing a **Consult Order**, specify the **Reason**, add the providers name in **Consult To:** and select whether you contacted the provider

5. **Bedside Procedure:**
   - Go to **Notes**, choose the **Procedure** tab, and select **Create in NoteWriter**

6. **Transfer a Patient**
   - Use **Transfer Navigator** tab and follow all steps
   - Complete **Medication Reconciliation**.

7. **Discharge to home:**
   - Use **Discharge Navigator** tab and follow all steps.
   - Complete **Medication Reconciliation**.

8. **Housekeeping and communication items:**
   - Use **In Basket** to complete Charts and Cosign items
   - Use **Secure Chat** to send a secure private message to a colleague
   - Use **Dashboard** to see your specific metric data

9. **Personalization:**
   - Open the **Personalize** menu button and spend time with **Order Sets**, **SmartPhrases**, **Preference Lists**, and **Macros** to make your life easier.

CHS Medicine Provider Quick Guides

Log In and Navigation

- Log In using your **CHS User ID** and **Password**
- Log into your **Department**
- **Schedule** is the first **Activity Tab** to open up.

Startup Activities

1. The **Schedule** tab lists office visits and scheduled inpatient procedures.
2. The **Patient Lists** tab shows admitted patients you are following.
3. The **Dashboard** tab shows your specific dashboard of statistics and has a Learning Home to learn how to use Epic.
4. The **InBasket** tab shows results, cosigns, HIM queries, incomplete charts, messages, & other communication items.
5. The **Secure Chat** tab shows the imbedded text messaging functionality of Epic.

Tool Bar

Items on the Tool Bar will change depending on your specialty, a few of the more popular items on the Tool Bar are:

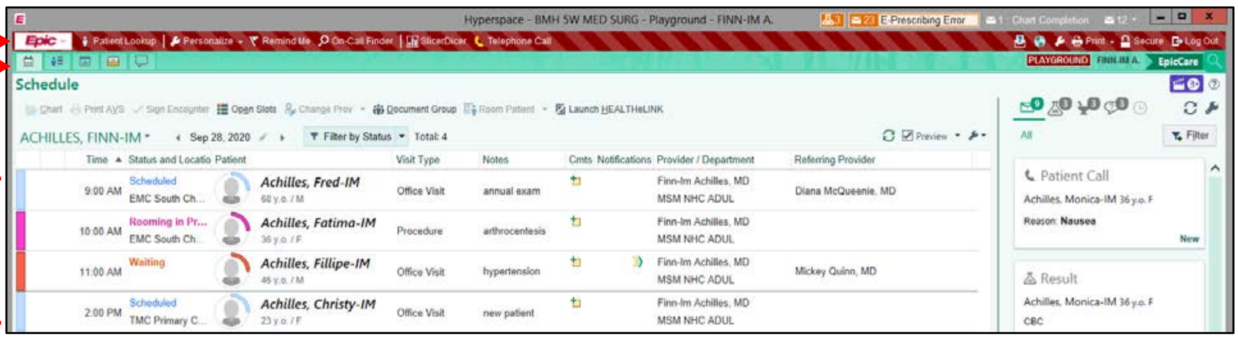
6. Epic — The **Epic Menu Button** opens up user settings and other Epic functionality.
7. Patient Lookup — The **Patient Lookup** tool open up a patient lookup window for finding patients.
8. Personalize — The **Personalize Menu** opens up a list of Epic items to personalize to make your life easier.
9. Prep for Procedure — The **Prep for Procedure** button is available for Procedure based specialties to prepare for procedures.
10. On-Call Finder — The **On-Call Finder** opens up a tool to find out who is on-call.
11. Print — The **Print** button opens up different printing options.
12. The **Wrench** helps modify the user settings or appearance of this section.

Schedule Activity

Tool Bar

Startup Activities

List of office visits and scheduled inpatient procedures



Patient Lists Activity - Finding Patients/Assigning Patients/Group Patients

- Open **Patient Lists** tab, this is your hub for managing patient assignments.
- **My Patients**- list shows the admitted patients you're following. Patients appear when you're assigned to their treatment team as the admitting, attending, consulting, or primary care physician. Admissions staff might assign you, or you might assign yourself when consulting on a patient.
- **My Group/Team Patients** – list shows patients your **Group/Care Team** is following.
- **Shared Patient Lists** - list of patients you and other providers are sharing.
- **Add Groups or Teams** to your lists by going to **Available Lists,** open up your hospital site and drill down to search for a specific group, hospital unit, or service that you want to add. Right click and use **Send To** or simply Drag and Drop the item to the appropriate list above.
- **Add patients or consults** to your lists in the same way, when you select the group, lists of patients appear in the main window, right click on the patient and **Assign Me** or **Assign Team** or whatever choice is appropriate.

Patient Lists Activity

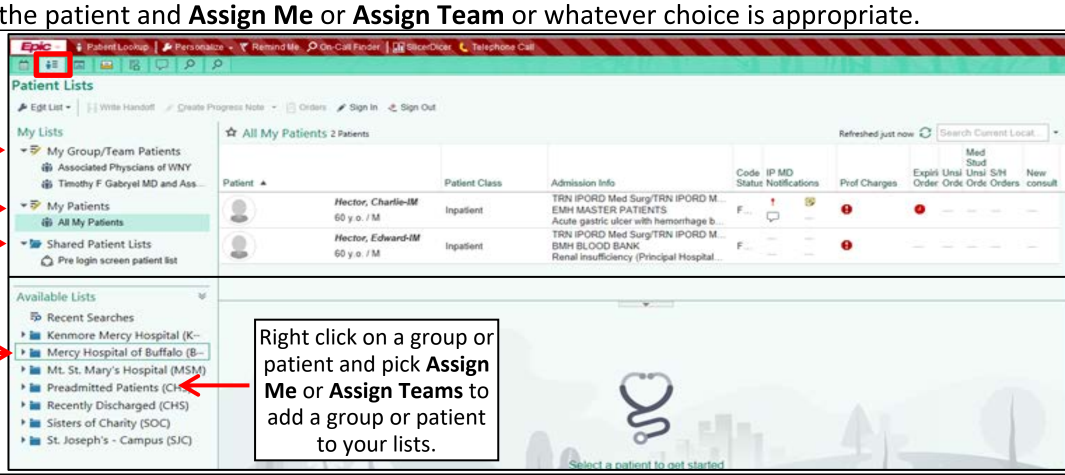
My Lists

My Group/Team

My Patients

Shared Patients

Available Lists: Click folders to open up and drill down to find groups or patients to add your list



Patient Chart Navigation

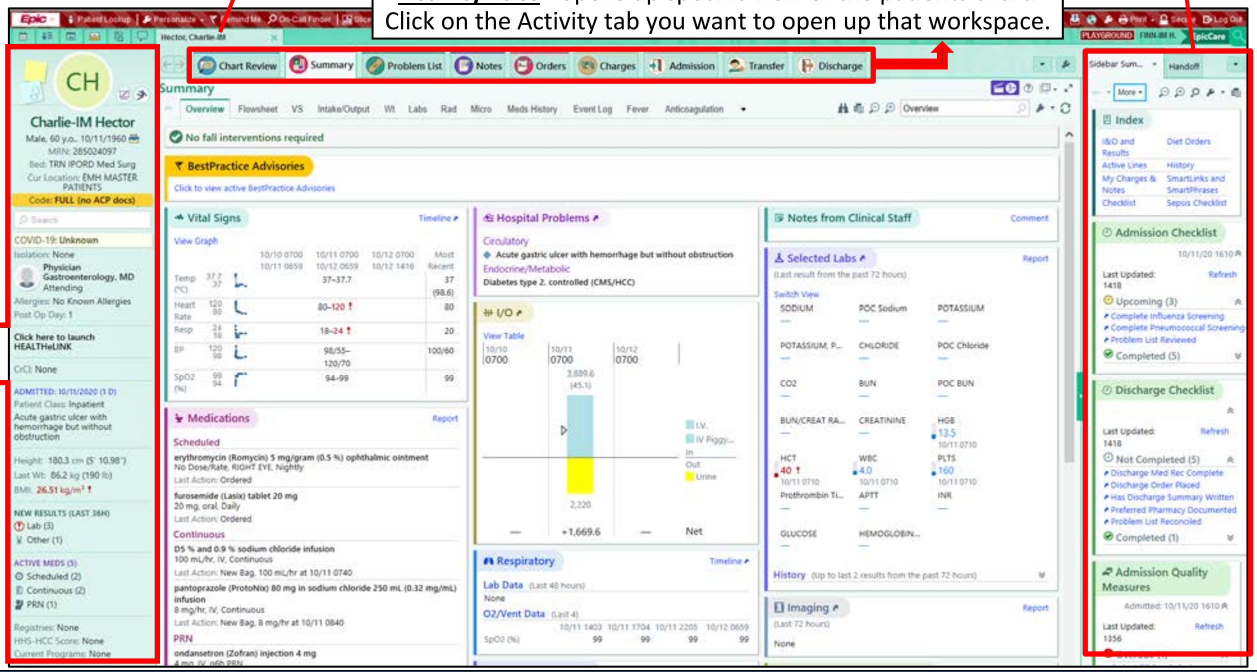
When you double click on Patient in your **Patient List** or **Schedule**, you open up the patient chart.

Patient Name

Sidebar

Activity Tabs - opens up specific view of the patients chart. Click on the Activity tab you want to open up that workspace.

Story Board
This displays useful patient information and hyperlinks that open up another part of the chart when you click on it. Hover over something and it opens up a window to discover more information.



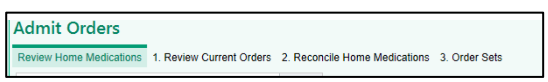
Inpatient Admission Navigator

When admitting a patient, use the **Admission Navigator** to complete the following tasks.

Admission Documentation

1. Consider clinical suggestions that appear in **BestPractice Advisories (BPAs)** section based on the patient's problem list and other information.
2. Review and update medical problems in the **Problem List** section and click the **Mark as Reviewed**.
3. Cosign orders in the **Cosign Orders** section.
4. Review and update allergies in the **Allergies** section and click **Mark as Reviewed** or **Unable to Assess**.
5. Review and update history in the **History** section and click **Mark as Reviewed**.
6. Document the patient's implants, such as drains and catheters, in the **Implants** section.

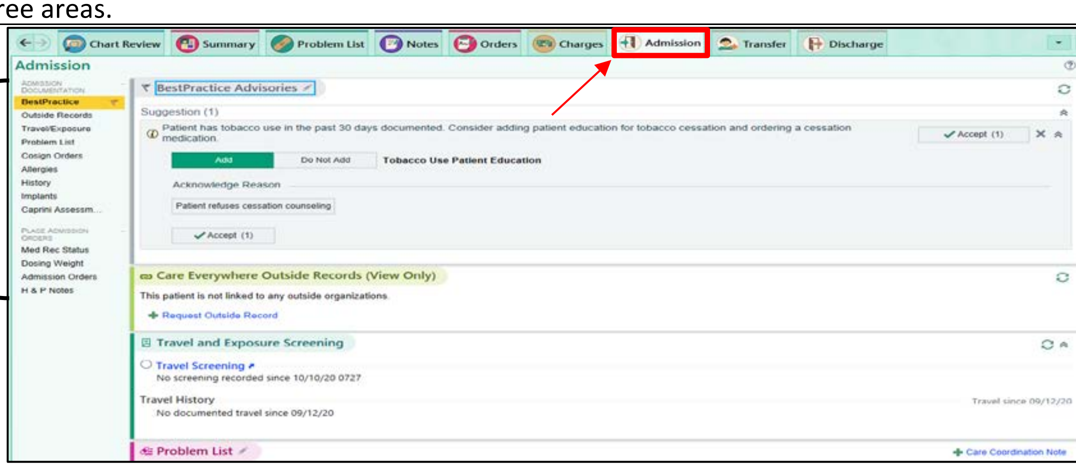
Place Admission Orders

7. Enter Dosing Weight
8. Complete Admission Orders: 

Review Home Medications 1. Review Current Orders 2. Reconcile Home Medications 3. Use Admission Order Set. Required fields must be completed, recommended fields should be completed but are not required. **Sign Orders** when done.
9. Write an H&P note in the **H&P Notes** section. Click **Create Note** to write a note with **NoteWriter**. Or, click **Go to Notes, click on H&P,** and then click **New Note** to write a note with **SmartTools** or free text. Use **F2** to go to areas that need to be completed, fill out **Pick-Lists** (Left-click to pick, Right-click to stick), **Wildcards ***** must be typed over. Use Dragon to dictate in any free areas.

Admission Navigator

Complete the task in the "Table of Contents" as part of the admission process.



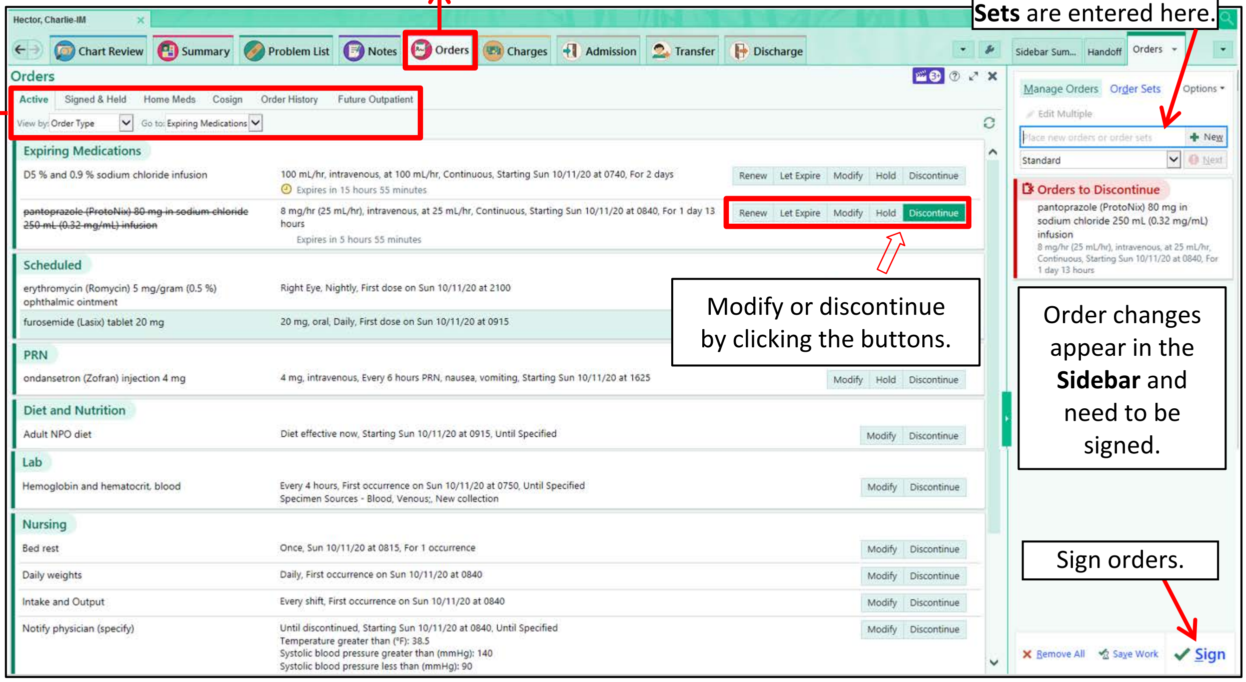
Orders Activity

Open up the **Orders Activity** workspace to place **Orders** and **Order Sets**.

Orders Activity Tabs – manage your orders here.

New Orders or **Order Sets** are entered here.

Orders tabs
Open up the specific view of the **Orders** that you want to display. **Active Orders** can be viewed.

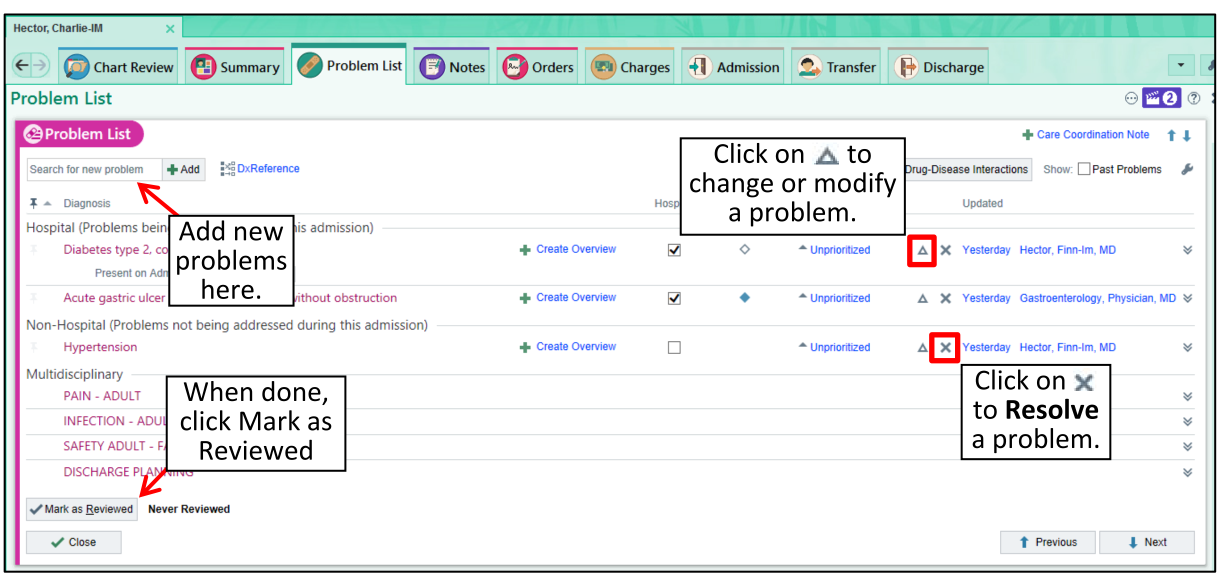


Problem List tab

Each patient has a single problem list that is available to all specialties across all visits and admissions. Use the **Problem List** activity or navigator section to review and update the problem list so you and other clinicians have the most accurate picture of the patient's condition. Updating the **Problem List** is important.

The system provides decision support based on these problems, so keep the **Problem List** updated during the admission. Icons: appears indicates the principal problem, indicates a chronic problem.

1. In the problem list, enter a few letters of the problem's name in the **Search for new problem** field and press **Enter**.
2. Select the appropriate diagnosis and select any additional details, such as laterality, in the bottom pane. Click **Accept**.
3. Enter information about the problem, such as the priority and if it was present on admission.
4. For pregnancy-related problems, select the check box next to the pregnancy episode to associate with the pregnancy.
5. To edit or correct an existing problem, click on the to select a more specific problem.
6. When a problem has ended, click to **Resolve**. The problem disappears from the problem list. The problem list is shared across all specialties, so any physician can resolve a given problem when it is no longer an issue.
7. Click the Mark as Reviewed to indicate that you reviewed the problem list and patient's current conditions.



Notes tab

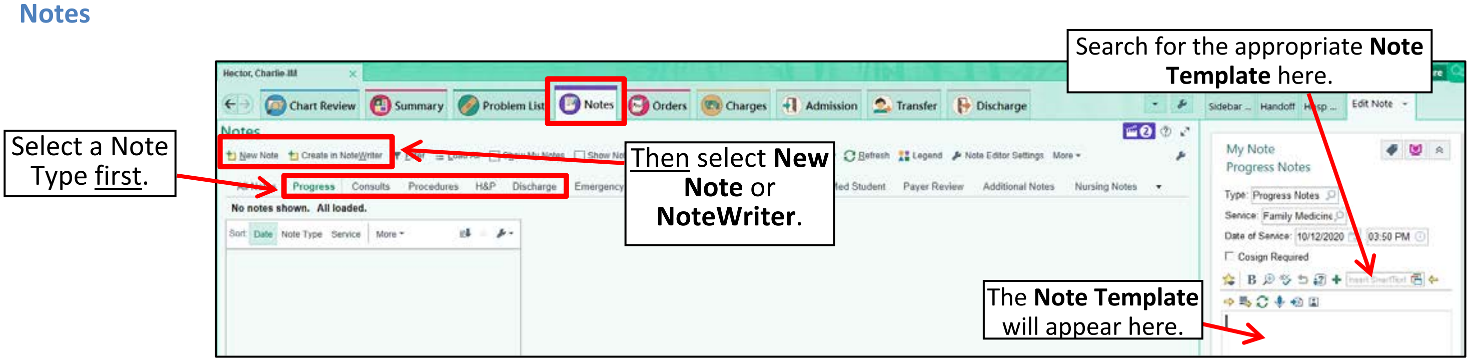
- You can write any type of note in the **Notes** activity. In addition, some navigators include a notes section so you can write a note while working on other related tasks.

1. Specify the **Note Type** (see below for common **Note Templates**).
2. Choose the type of note you want to write. Click:
    a. **New Note** to write a note with **SmartTools**, free text, or Dragon dictation.
    b. **Create in NoteWriter** to use point-and-click documentation.
3. Select the **Note Template** in the right sidebar if one didn't appear automatically.
4. **SmartTools** are charting shortcuts that you can use to pull different information into your documentation. There are several different types of **SmartTools**: **SmartPhrases** (phrases or paragraphs), **SmartLinks** (pulls info from another part of the chart), **SmartTexts** (Templates or long blocks of text), **SmartLists** (a predefined list of choices).
5. Put your cursor in the Note and press F2 (to get you through) to move to items that need to be filled out.
    a. **Pick-Lists** in yellow (Left-click to pick, Right-click to stick)
    b. **Wildcards** *** are placeholders for text to be added (you must type over it or delete it)
    c. **SmartLinks are highlighted in blue, they pull in information from other parts of the chart.**
    d. **NoteWriter** – left-click for a positive finding, right-click for a negative finding, text fills in on the right sidebar, add comments as needed. Use a macro for filling in many items with 2 clicks.
    e. Use **SmartPhrases**, Type, or use **Dragon** to add text in any open areas.
6. When done, **Sign** Note or **Pend** to finish at another time.
7. If you need to make any changes to a signed Note, select the note from the list and use **Addendum,** make any necessary changes and **Sign** the note.

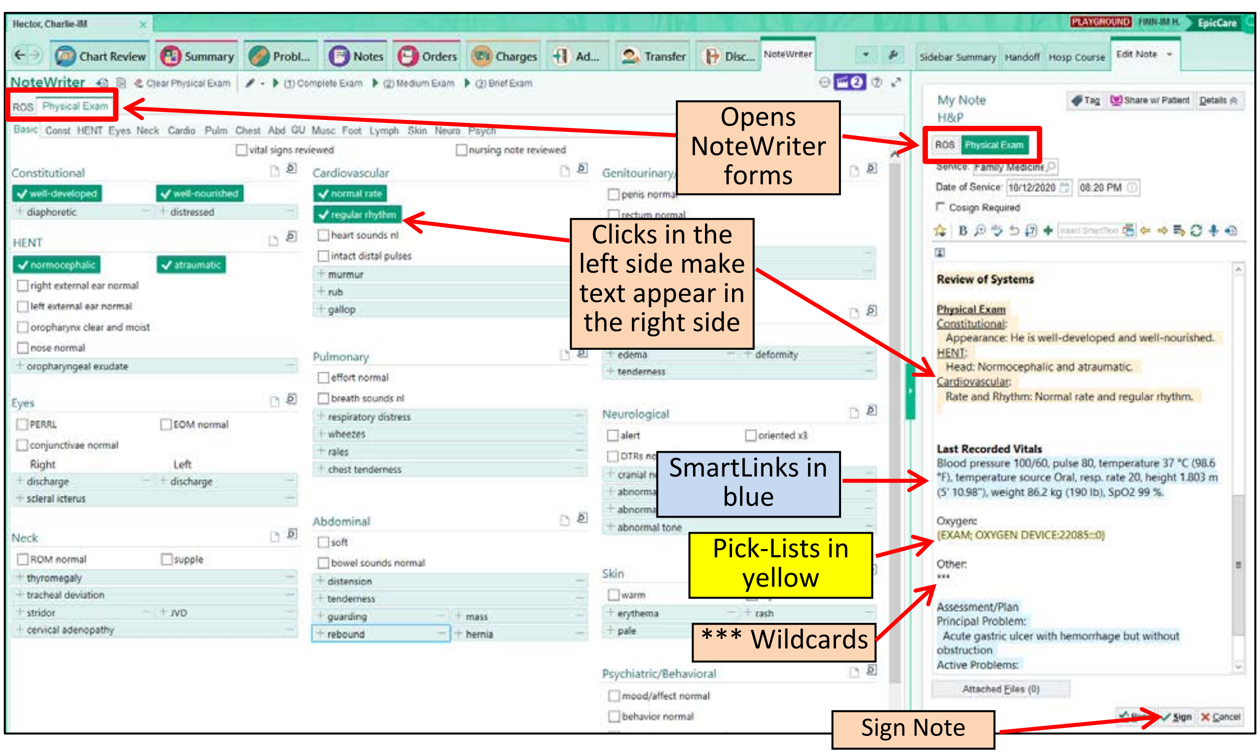
Common Note Templates to use

<u>Progress Notes:</u> **Standard Visit Note**, **Simple Visit Note**, **Gen IP Progress Note**
<u>H & P:</u> **General H&P**, **Gen IP H&P**
<u>Consults</u>: **Gen IP Consults**
<u>Discharge Summary</u>: **Gen IP Discharge Summary**

Notes



NoteWriter



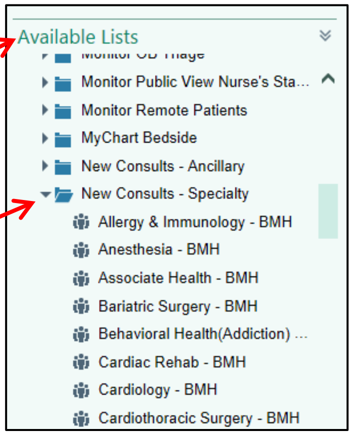
Consults

Find the patient you are consulted on by going to: **Patient Lists** tab, in the **Available Lists** on the bottom left, drill down to the **New Consults - Specialty** and open up your specialty folder and find your patient.

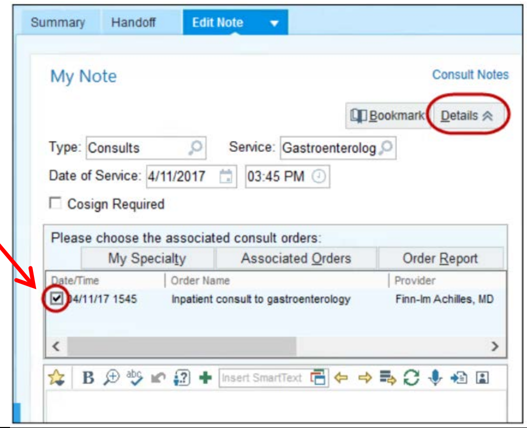
1. Right-click to add the patient to your **My Patient** list.
2. When you create a consult note, click **Details** in the **Edit Note** tab of the right sidebar and select the order associated with your consult note.
3. Select a **Note Template** to use, compose your note as usual. When you sign the note, the consult order is completed.

In the **Patient Lists** activity, look in **Available Lists**.

Open up the folders and drill down to the **New Consults**, look in your specialty, a patient list will appear in the main workspace



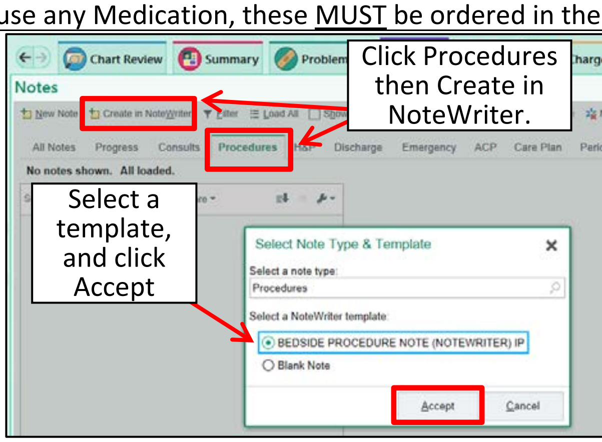
Associate the **Consult Note** with the **Consult Order**

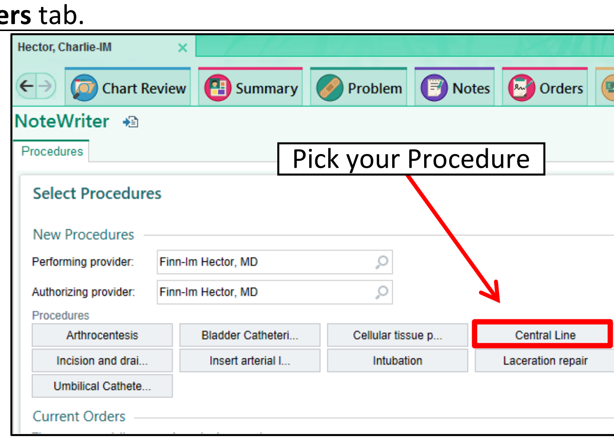


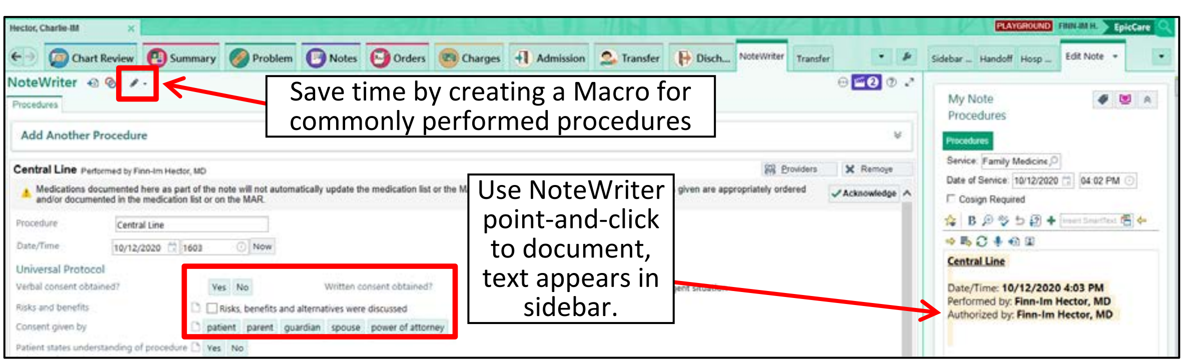
Bedside Procedures

Procedure notes work a bit differently, when you begin writing the note, the system also places an order for that procedure. Signing the note also signs the order behind the scenes. Charges automatically accrue and file when you sign it.

1. Open the Notes activity and select the **Procedures** tab.
2. Click **Create in NoteWriter** and select the **Bedside Procedure Note** template.
3. Click the button for the procedure.
   - If you don't see your procedure, click **More**.
   - If you still don't see your procedure, Go to the **Orders** activity and write and sign an order for the procedure.
     - o Open a new procedure note, click the link for the procedure under **Current Orders**. A **NoteWriter** form appears.
     - o Document the procedure by clicking the **NoteWriter** buttons and adding free text as necessary, sign Note.
4. Document the procedure by clicking **NoteWriter** buttons, you can add free text and use **SmartTools** if desired.
   - Be sure to document completely. Charging is driven by your documentation.
5. **Sign** the note. If you are an employed by CHS, go to the **Charges** activity and review charges for the procedure.
6. If you use any Medication, these <u>MUST</u> be ordered in the **Orders** tab.

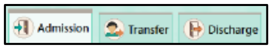




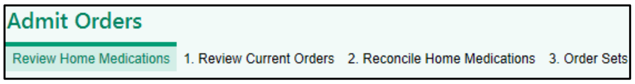


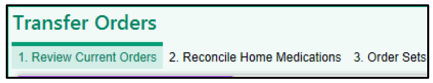
Medication Reconciliation

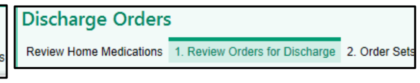
- **Medication Reconciliation** (med rec) is the process of comparing a patient's current orders with new orders. To maintain a complete and accurate list of medications, reconcile medications at **Admission**, **Transfer**, and **Discharge**.

1 **Med Rec** can be found in the  tabs in the respective section: **Admission Orders, Transfer Orders,** or **Discharge Orders.**

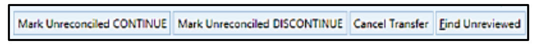
2 Open the **Navigator** and you will be guided through the stages of **Med Rec** based on the **Navigator** you are using. The process is similar with all types of **Med Rec**.

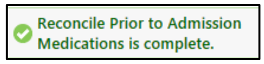


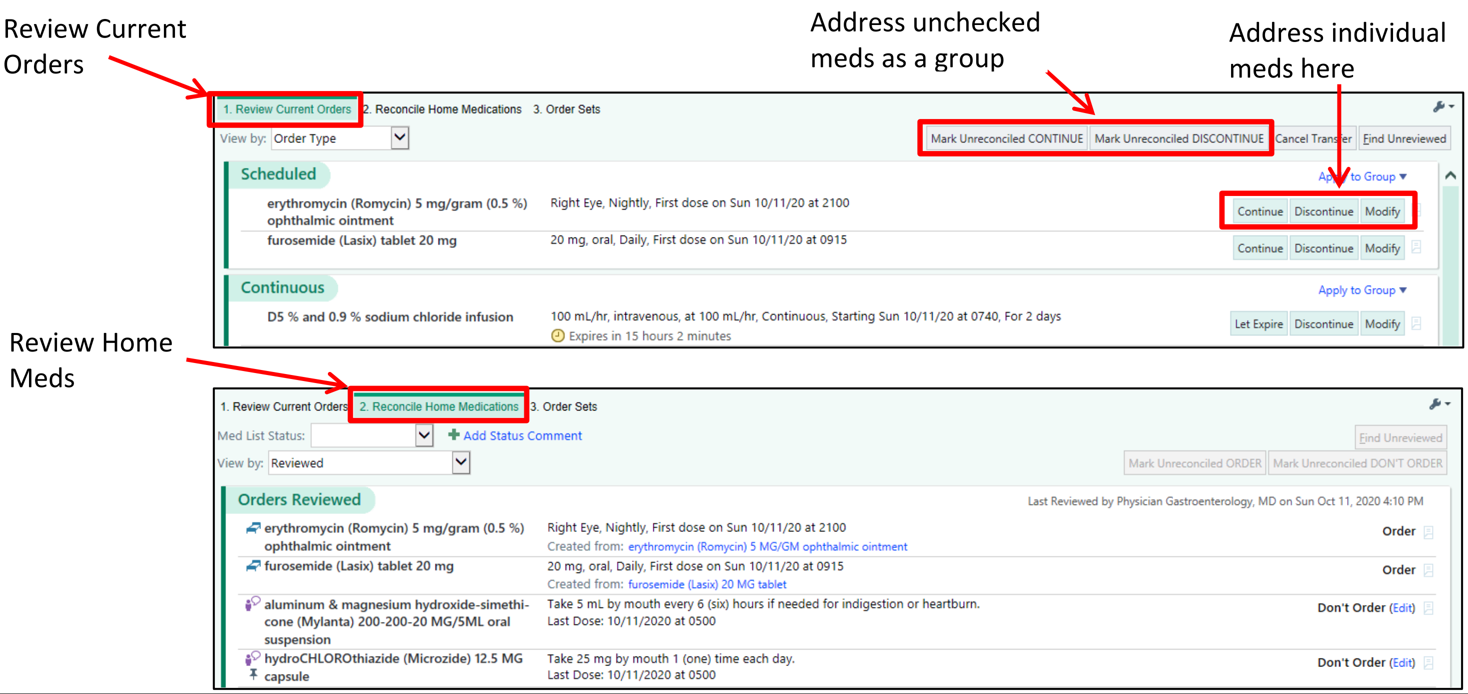




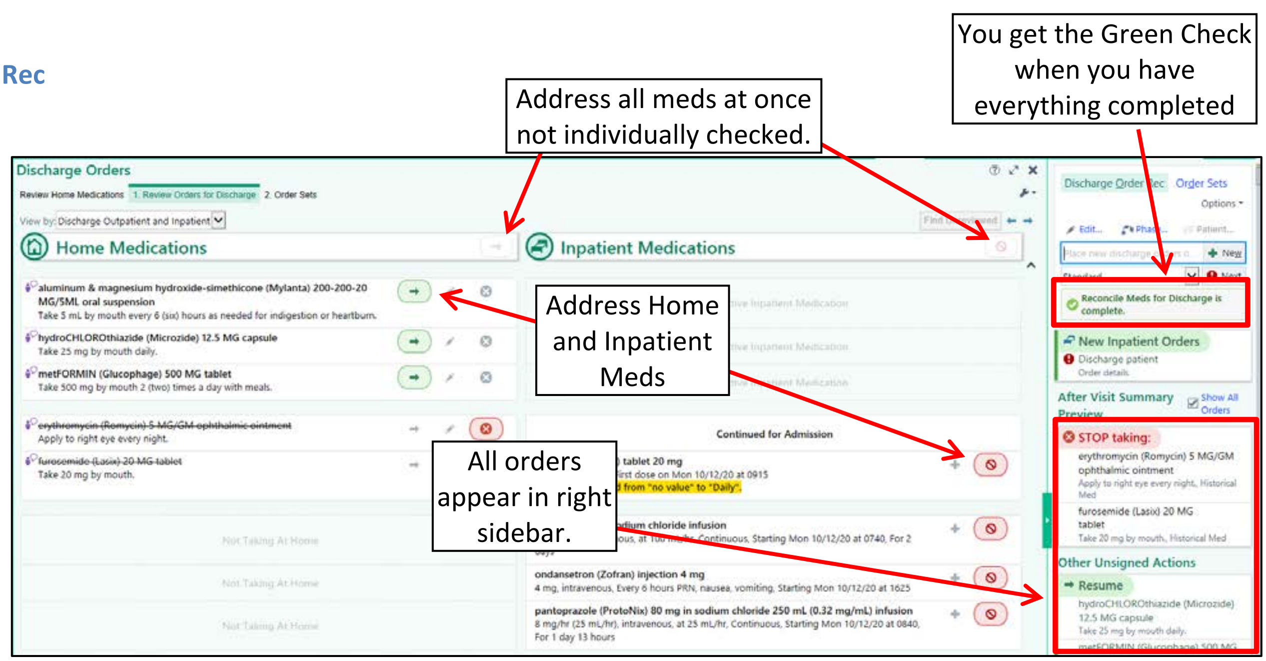
3 You must complete all the different sections.

4 Every Medication must be reviewed, addressed individually or as a group,  **Mark Unreconciled CONTINUE** continues all medication that are not checked, **Mark Unreconciled DISCONTINUE** discontinues all medication that are unchecked. Orders appear in the right sidebar and must be signed.

5 When you have completed all the required fields,  appears in the right sidebar.



Discharge Med Rec



Transfer Navigator

When transferring a patient, use the **Transfer Navigator** to complete the following tasks.

- For **Post-Operative** transfers, use the **Post procedure Navigator.**

<u>Transfer Documentation</u>

1. Consider clinical suggestions that appear in **BestPractice Advisories (BPAs)** section.
2. Review and update medical problems in the **Problem List** section and click the **Mark as Reviewed**.
3. Cosign orders in the **Cosign Orders** section.
4. Complete the **Transfer Note**

<u>Hospital Course</u>

5. Add information to Hospital Course tab in the right sidebar is recommended.

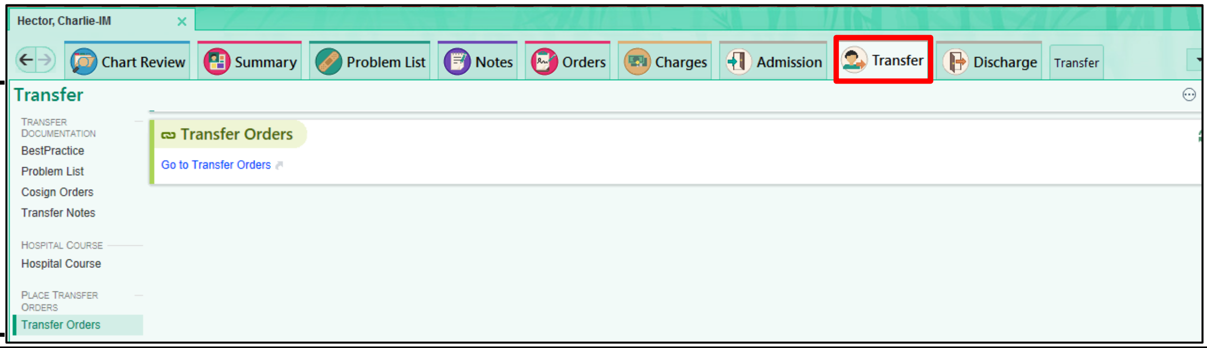
<u>Place Transfer Orders</u>

6. Complete Transfer Orders: 

1. Review Current Orders 2. Reconcile Home Medications 3. Use Admission Order Set. Required fields must be completed, recommended fields should be completed but are not required. Sign Orders when done.

Transfer Navigator

Complete the task in the sidebar as part of the transfer process.



Discharge Navigator

When discharging a patient, use the **Discharge Navigator** to complete the following tasks.

1. Consider clinical suggestions that appear in the **BestPractice Advisories** section.
2. Review the last day's results and unresulted labs in the **24-Hr Results** and **Unresulted Labs** sections.
3. Adjust discharge prescription printing options in the sidebar. If you don't make any changes, prescriptions are e-prescribed. If the patient wants printed prescriptions, click **Edit Multiple**. If the patient is going to a skilled nursing facility, select all the prescriptions and apply a **Medication Class of No Print**. The other facility will receive the med list as part of the **After Visit Summary** or transfer report.
4. To maintain a complete and accurate list of medications, reconcile medications in the **Discharge Orders** section.
5. Review and update the problem list in the **Problem List** section, resolving any problems that have been addressed. When you're done, click ✔**Mark as Reviewed**.
6. Cosign orders in the **Cosign Orders** section.
7. Write a discharge summary note about the admission in the **Discharge Summary** section. Click **Create Note** to write a note with **SmartTools** or free text.
8. Preview the **After Visit Summary** in the **After Visit Summary** section. The nurse will add more instructions and print or provide an electronic copy for the patient.

Discharge Navigator

Complete the task in the sidebar as part of the discharge process.

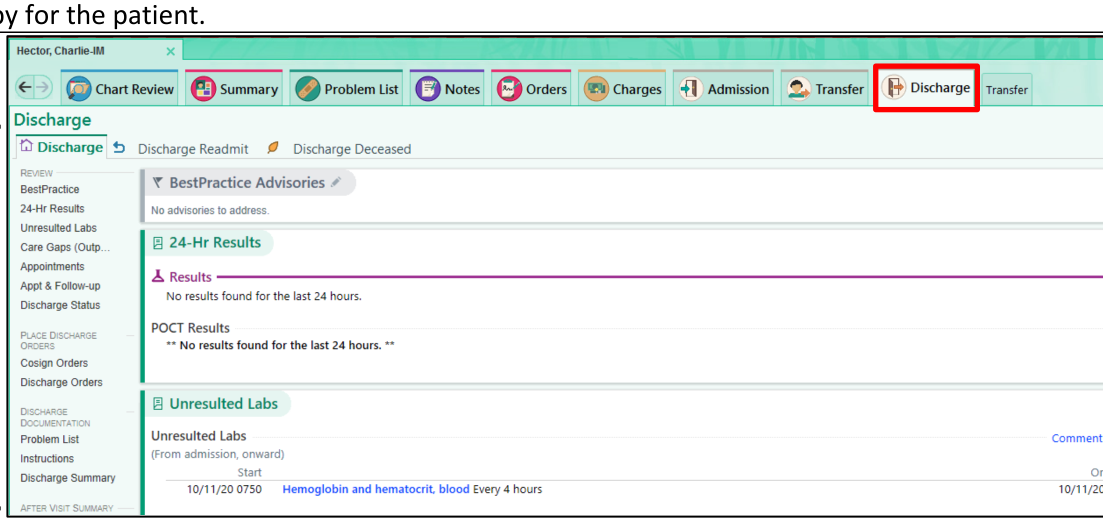


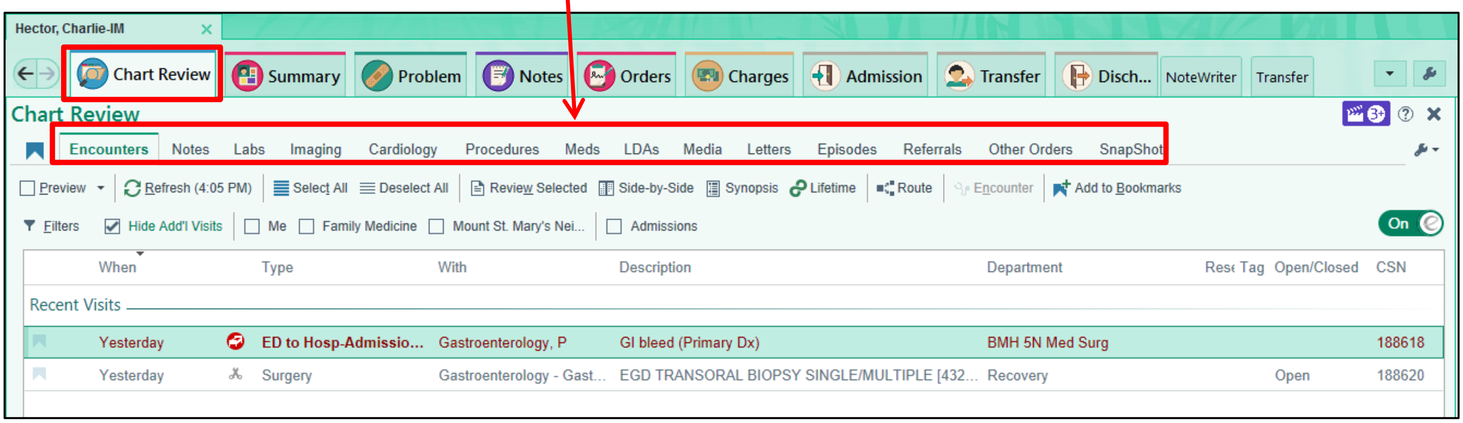
Chart Review

You can review patient data using a variety of tools. Use this table to determine which activity meets your needs:

Activity	Description
Summary	Overview report: See the big picture of the current admission. Accordion reports: See trends in vitals, I/O, lab results, and more.
Orders	See all orders since admission, including discontinued orders.
Intake/Output	See trends in fluid levels and hydration, including weight-based totals and graphs.
Chart Review	See information about prior admissions and visits.
Notes	See all notes, organized by type.
Results Review	See current and past lab results, search for specific results, and choose to view only new results.
Synopsis	See correlations between vitals and events like procedures, med administrations, and results.

Chart Review

Select the tab for the type of information you want to review



Summary

Select the tab for the type of information you want to review