Epic

Epic 2018

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CLN251/252

CLN251/252 Configuring the Epic End User Clinical/Shared

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CLN251/252 Configuring the Epic End User Clinical/Shared

Lesson 1: Introduction

Introduction

Welcome to Configuring the Epic End User

The Configuring the Epic End User training companion is intended to be used in conjunction with the material presented in class and your notes on that material. The contents of this companion will help reinforce the topics covered in class, and provide additional depth and detail when appropriate.

The chapters in this companion are ordered chronologically to correspond with the material presented in class.

The companion is yours to keep, so feel free to make notes, highlight, or otherwise mark it in any way that will aid your study.

After training is complete, this companion will be a valuable study aid. It is recommended that you read the companion as part of your preparation for other classes and certification exams. Be sure to answer the review questions at the end of each chapter. However, do not limit your study to the companion alone. Reviewing your lecture notes and completing hands-on practice within the system are critical to success.

Customer/Consultant Agenda

Day 1 (8:30 am - 5:00 pm)	Day 2 (8:30 am - 12 pm)
• Introductions and Welcome • Class Overview • Overview of Chronicles • Reports and Print Groups • Profiles • Navigators • Workflow Engine Rules • End of Day Wrap-Up	• Users and Providers • Security Classes • User Roles • Lab Synthesis Exercise

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CLN251/252 Master File Cheat Sheet

Take this page out and use it to write down key terms and concepts covered in class.

Reports (LRP)	Profile (LPR)
Navigator (LVN)	**Workflow Engine Rule (LOR)**

User (EMP)	Provider (SER)
Security Class (ECL)	**Role (E2R)**

What Do the Text Boxes Mean?

In the training companion, special text boxes are interspersed throughout the chapters. The following show the icons and describe the purpose of each.

An information box with the exclamation point icon means that the information is critical.

An information box with this icon means you are being provided setup information related to the topic. This most often appears in a Fundamentals chapter, and provides basic information about the system build required to get a feature to work properly.

My Questions

Because customers from different organizations are in the room and our time is limited, use this sheet to record your site-specific and other questions to bring up with your Epic Implementer or Technical Services representative. Your instructor is happy to try to discuss any site-specific questions during breaks, if time permits.

My Questions (continued)

Lesson 2: Overview of Chronicles

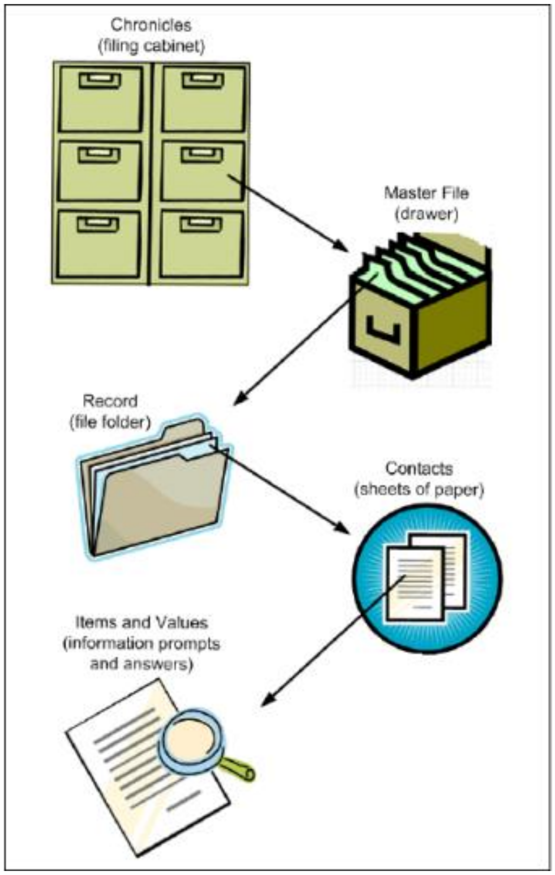
Overview of Chronicles

Overview of Chronicles

The foundation for everything done in Epic is the underlying data structure. Having a basic understanding of this structure will help you answer questions and allow you to investigate and better understand the system.

This chapter will introduce the basic terms for Chronicles, Epic's database management system. We will investigate the structure of some of Epic's master files and explore how you can use tools such as Record Viewer to investigate issues.

Chronicles Data Structure



Chronicles

You can think of *Chronicles* as a giant file cabinet. All of the data that your staff and clinicians enter in the system is stored in this file cabinet. Chronicles manages data and provides the underlying structure that allows you to run reports and searches, analyze statistics, perform computations, import and export data, and manipulate data set structures.

Master Files

Information in Chronicles is organized into *master files*. Each master file stores all of the data about one type of thing. For example, information about patients is stored in the Patient master file.

The drawers in the filing cabinet represent master files. Each drawer stores all of the information about one type of thing.

Some master files are routinely updated by your staff. For example, clinicians constantly modify and add data to the Patient master file. These master files are sometimes referred to as "dynamic" master files. Other master files, like the Procedure master file, are only updated by administrators. You may hear these master files referred to as "administrative" or "static".

Each master files has an abbreviated name called the INI. A master file's INI is a three character initial. For example, the Patient master file's INI is EPT.

Records

The next level in the Chronicles data structure is a *record*. Within each master file, we need a way to keep specific examples of that type of thing separate. That is the purpose of records. Each record stores information about one specific entity in the master file. For example, each patient has one record in the Patient (EPT) master file.

In the filing cabinet analogy, each folder represents one record. Information about doctors and other clinical staff is stored in the Provider (SER) master file in Chronicles. Each individual clinical staff member has one record in the Provider master file.

Each record has a name and an identification number (ID). While two names within the same master file might be the same, IDs must be unique. For example, if there are two doctors named Jane Smith at your organization, you would create two provider records that have the same name, but each would have a unique ID.

Contacts

In Chronicles, date-sensitive information about a record is often stored within a *contact*. A contact is a date-specific snapshot of the data within a record. For example, in the Patient master file, the information about a patient that is specific to one hospital stay is stored in a contact. The Patient master file is unique in that it includes many different types of contacts, including hospital encounters, appointments, and telephone encounters.

> For example, Harold Saunders has a record in the Patient (EPT) master file. One year ago, he went to the emergency department. Five weeks ago, he had an office visit. Yesterday, he called and talked with a nurse.
>
> When talking about the Patient master file, you can think of each contact as an encounter. So, each contact (emergency, office visit, and telephone) is recorded separately in Harold's patient record. Each contact contains the new information received in that visit.

In the filing cabinet diagram, contacts are represented by dated sheets of paper in the file folder.

In administrative master files, such as the Medications (ERX) master file or Procedures (EAP) master file, contacts do not represent hospital encounters or appointments. Instead, they represent a date specific change in the information. The purpose of the contact is to make a change to the record that will become effective on a specific date. Prior to the effective date of the contact, the old values will be used by Hyperspace. On the date of the contact and beyond, the new values will become effective.

Not all data in a record is contact specific. For example, if you change a patient's name in their most recent contact, it will change across all contacts in that patient's record.

While most master files utilize contacts, contacts are not available within some master files.

Items and Values

Individual pieces of data are stored in records as *items* and *values*:

- An item is like a question prompt on a standardized form.
- A value is like the answer.

Every record in a master file contains the same items, but the values entered for each item will vary between records.

Exercise 1: How Is Chronicles Organized?

Filing Cabinet Analogy	Epic Term
Filing cabinet	CHRONICLES
Drawer	MASTER FILE
A file folder in a drawer	RECORD
A dated, or versioned, paper form	CONTACT
A question on a paper form (Name, Sex, etc.)	ITEM
An answer to a question on a paper form	VALUE

Exercise 2: Identify the Components of Chronicles

Use the six terms from the previous exercise to fill in the blanks below. Each term will only be used once.

1. All of the information that you enter in Hyperspace is stored in ____CHRONICLES____, Epic's database management system.
2. A(n)____CONTACT____ is a date-specific snapshot of the data within a record.
3. Each ____MASTER FILE____ stores all of the data about one type of thing.
4. A(n) ____ITEM____ is a discrete field within a record.
5. Each ____RECORD____ stores information about one specific entity in the master file.
6. A(n) ____VALUE____ is the data that is stored in an item.

Relate the Components of Chronicles to Fundamentals

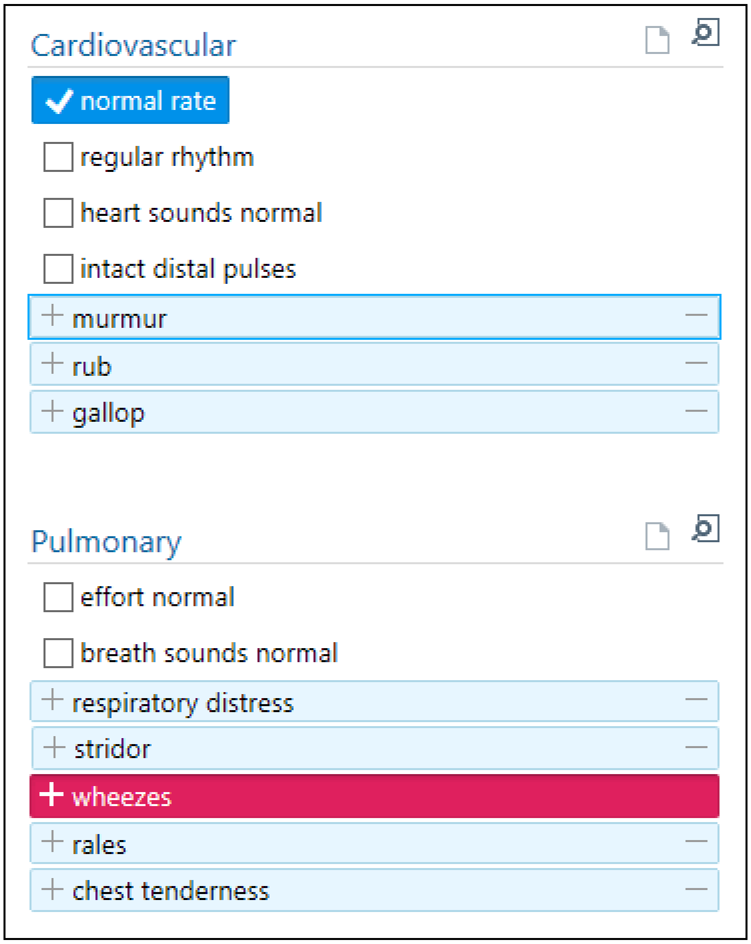
Instructor Demo: Add Patient Information to an Encounter

Your instructor will log in as a provider and document some information to a patient encounter. The steps are included for your practice after class.

> **!** In practice environments, Dr. Andy will not have any patients on his schedule.
>
> To open an encounter with Dr. Andy, use the following path: **Epic > Patient Care> Encounter**. From here, you can look up any patients used in class and access their encounters.

1. Open your Richard patient's encounter from the schedule.
2. Enter a visit diagnosis:
   - In the **Plan** activity, go to the **Problem List** section.
   - Find Richard's problem of Type 2 diabetes mellitus and copy it as a visit diagnosis.
3. Place an order:
   - In the visit taskbar, click **Add Order**.
   - Search for lipid panel.
   - Click **Sign Orders.**
   - When prompted, associate the lipid panel order with the Type 2 diabetes mellitus diagnosis.
   - Click **Accept** to complete signing the order.
4. Write a note:
   - In the sidebar, select the Notes tab at the top.
   - Click the drop-down arrow next to **Create Note,** select **STANDARD VISIT NOTE**, and click **Create New Note**.
   - This Note Template links out to forms in the NoteWriter activity.
5. Use NoteWriter:
   - Click **Physical Exam** to jump into NoteWriter.

- Document just two pieces of information: normal heart rate and positive for wheezes



6. **Accept** the note and exit the patient workspace.

Use Record Viewer to Look at a Record

The structure of patient data is quite complex, but it starts with the Patient (EPT) master file. An activity called Record Viewer allows you to see how this data (as well as other data in Chronicles) is stored. With your instructor, you will log in to view the patient record where documentation was just completed.

1. Log in to Hyperspace as your builder.
2. On the Hyperspace toolbar, click **Record Viewer**.
3. For **INI**, enter EPT.

What part of Chronicles does the INI field represent? MASTER FILE

4. In the **ID** field, enter the name of your instructor's Richard patient.

What part of Chronicles does the ID field represent? RECORD

5. In the **Contact** field, select the Office Visit with today's date.
    - Contacts allow Epic to track data that changes over time. For example, Richard's diagnosis today was diabetes mellitus. The contact or encounter from a year ago might have been related to his thyroid issues.
6. Click **View** to look at the data.

What part of Chronicles does the information on the left of Record Viewer represent? ITEM

What part of Chronicles does the information on the right of Record Viewer represent? VALUE

The data structure for some of the information is pretty straightforward.

7. Notice Richard's demographic data, such as address, state, date of birth, and sex.

Some other pieces of data are stored as "related groups."

8. **Jump To Item** 18400, which stores the diagnoses from this visit.
    - Notice the table made up of information that is related to item 18400.

18400-DIAGNOSES THIS VISIT
1. 1
1. Type 2 diabetes mellitus without complication, with long-term current use of insulin (CMS/HCC) [1655536]

Data in a related group

Orders data is stored in a more complex way.

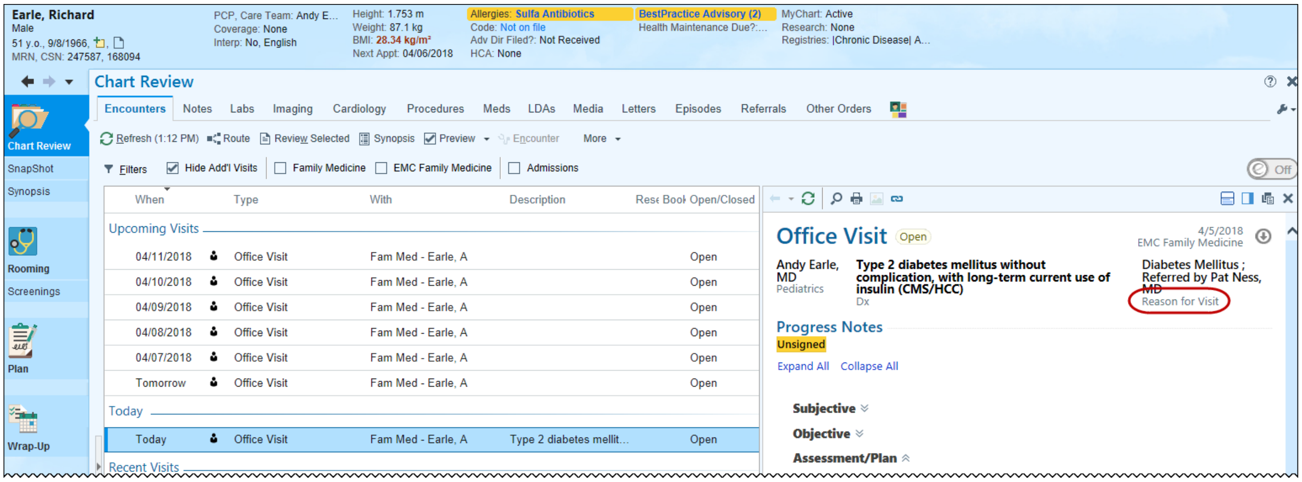
9. Scroll down or **Jump To Item** 19000.
    - This item stores information related to the orders placed during this visit.
    - One order (lipid panel) was placed for Richard. This action created a record in another dynamic master file, the Orders (ORD) master file.
10. Click the **ORD** link in item 19000.

Which master file are you in?
ORDERS (ORD)

11. In the order record, scroll through to see some of the items stored in the Orders master file.
12. Click **Previous** to go back to Richard's patient record.
13. In EPT, **Jump To Item** 20330.
    - This is a link from the patient record to the Notes (HNO) master file.
    - When any note is written for a patient (such as a Progress Note like you created for Richard using NoteWriter), a new notes record is created.
14. Close Record Viewer.

Exercise 3: Relating the Components of Chronicles to a Patient

In this activity, you will apply your knowledge about Chronicles to a specific example from a patient record. Use the screen shot to answer the questions.



Encounter report in Chart Review

1. Using the terminology we've covered for Chronicles, "Earle, Richard" is the name of the ____RECORD____ being viewed in the screen shot.
2. The **Reason for Visit** (circled) part of the report is an example of one what? ____ITEM____
3. What is the corresponding value for the **Reason for Visit**? ____DIABETES MELLITUS____
4. The values entered in the items on this form are specific to this one office visit. An office visit is an example of which part of the Chronicles data structure? ____CONTACT____

After Class Exercise

Exercise 4: Watch the E-Learning Related to Chronicles

To learn more about Chronicles, log in to https://welearning.epic.com and watch the following e-learning lesson:

- GEN601: Introduction to Chronicles

The e-learning has an accompanying workbook that is available from the lesson's weLearning page.

Reviewing the Chapter

Review Questions

1. What is Chronicles?

CHRONICLES IS EPIC'S DATABASE MANAGEMENT SYSTEM AND IS USED BY ALL EPIC SOFTWARE APPLICATIONS.

2. True or False: You can use Record Viewer to edit data in a record.

FALSE: RECORD VIEWER ONLY ALLOWS YOU TO VIEW DATA.

3. When you document on the patient as a clinician, what is the data you are entering called?
   a. Item
   b. Value
   c. Contact
   d. Record

B: VALUE

Review Key

1. What is Chronicles?

CHRONICLES IS EPIC'S DATABASE MANAGEMENT SYSTEM AND IS USED BY ALL EPIC SOFTWARE APPLICATIONS.

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FALSE: RECORD VIEWER ONLY ALLOWS YOU TO VIEW DATA.

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   a. Item
   b. Value
   c. Contact
   d. Record

B: VALUE

Study Checklist

Make sure you can define the following key terms:

- ☐ Chronicles
- ☐ Master file
- ☐ Record
- ☐ Contact
- ☐ Item
- ☐ Value

Make sure you can perform the following tasks:

- ☐ Look up a record using Record Viewer

Make sure you fully understand and can explain the following concepts:

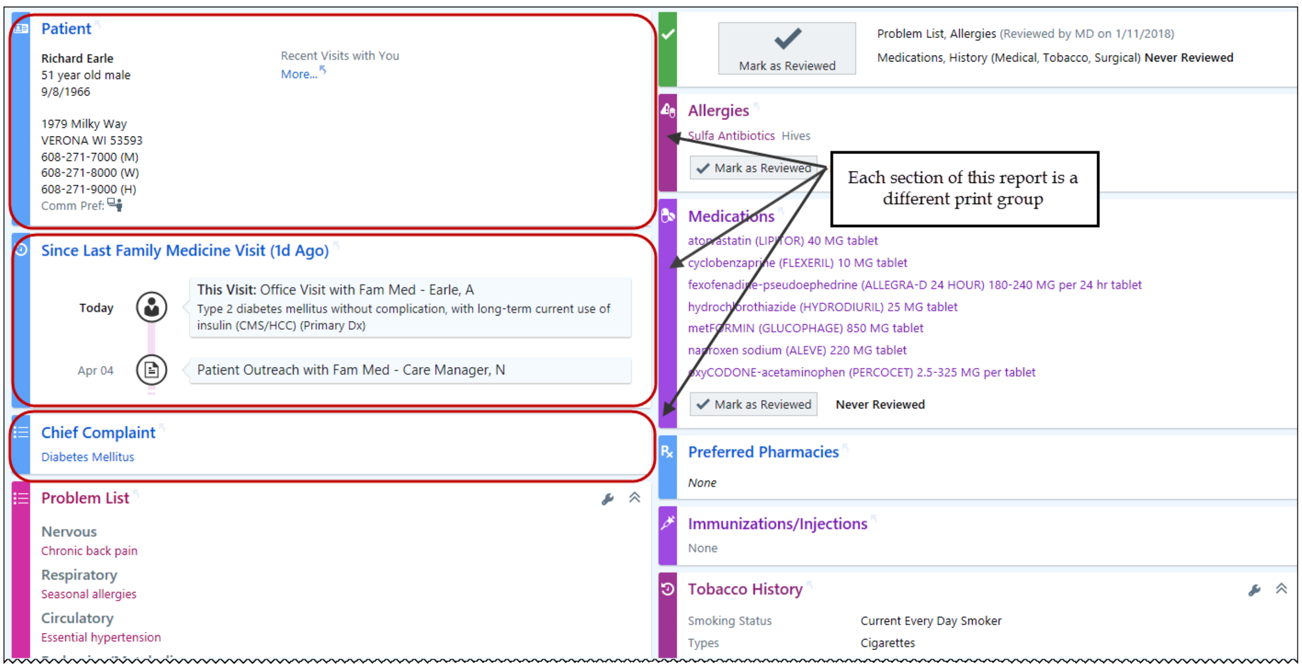
- ☐ The structure and organization of Chronicles (master file, record, etc.), using examples of each

Lesson 3: Reports: Make Data Available to an End User

Reports: Make Data Available to an End User

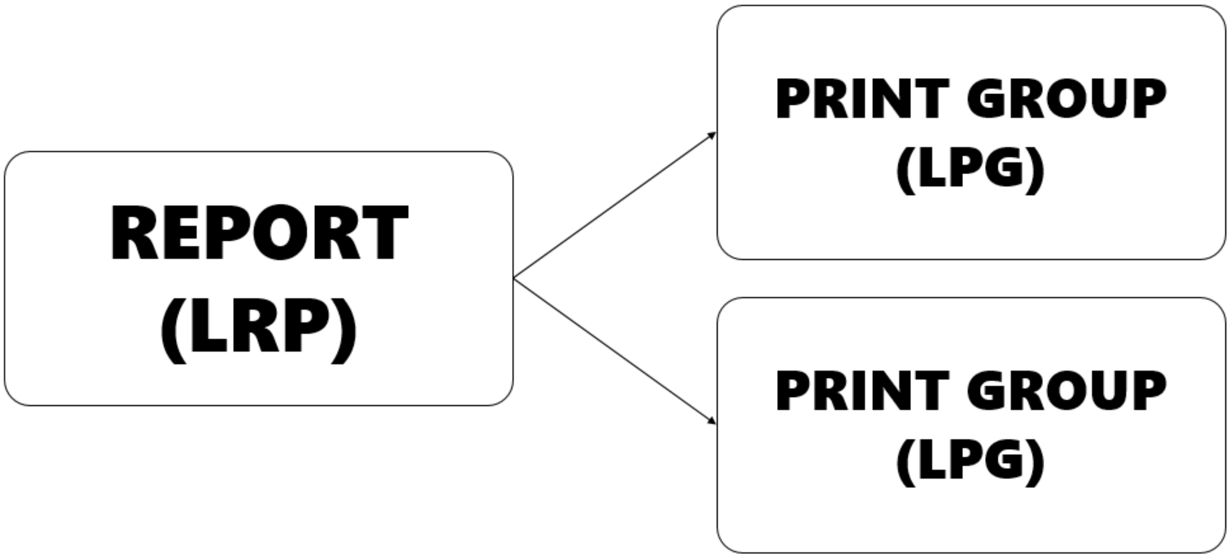
Reports: Make Data Available to an End User

Many activities, such as Chart Review, SnapShot, and Summary, allow users to review information via reports. A *report* is a collection of *print groups*. Print groups query the Chronicles database and display the information in a specific format.



Reports are used in more places than the activities mentioned above. Epic also uses reports to format In Basket messages, as print-outs for order labels and prescriptions, for read-only sections in navigators, and many other places.

The Big Picture



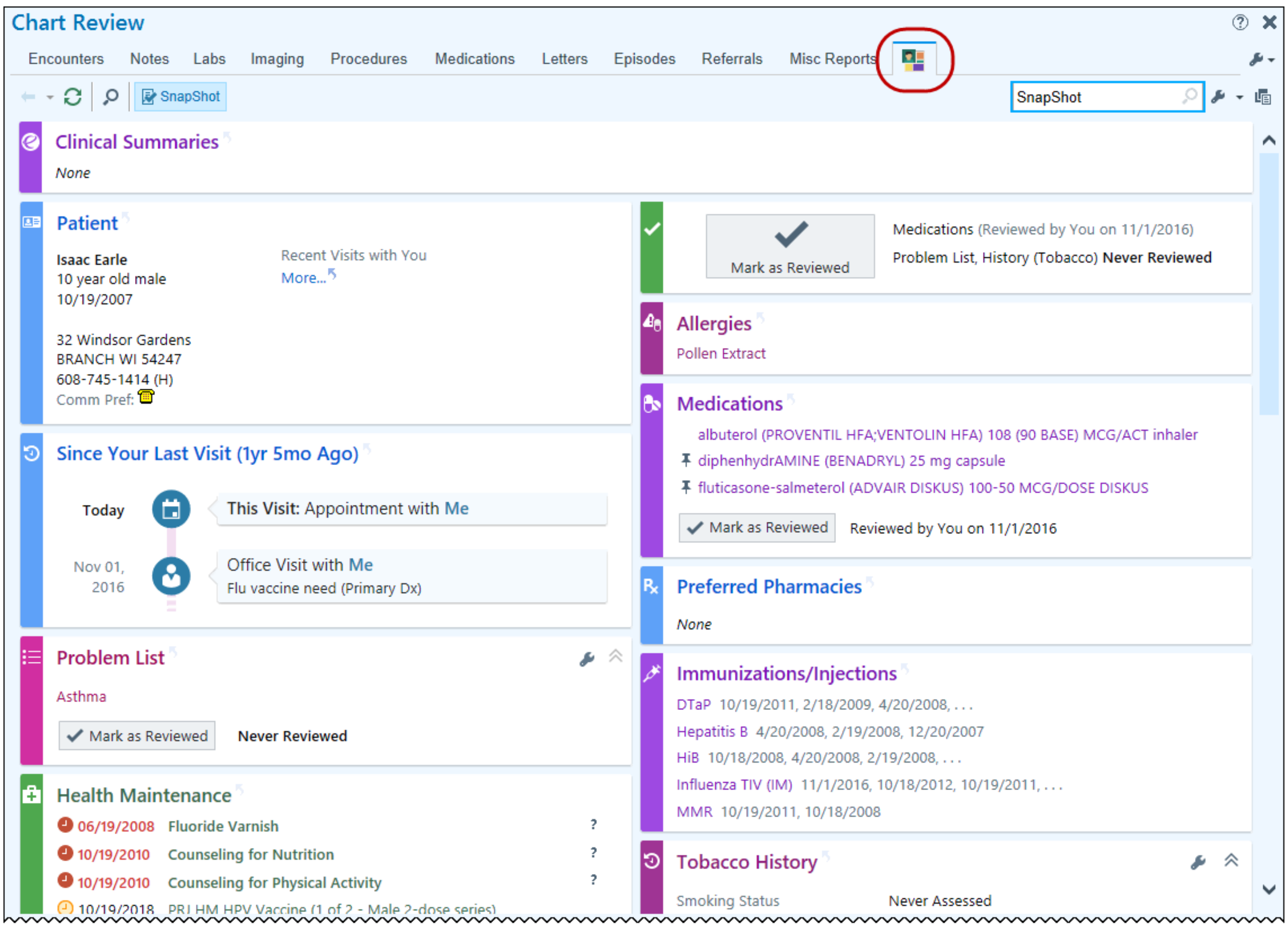
Reports are built by listing the print groups that contain the information you want to display to clinicians. The print groups get their information from Chronicles by looking at specific items and the values that are stored in those items.

Report and Print Group Master Files

Each record in the Report (LRP) master file points to one or more records in the Print Group (LPG) master file. Each print group retrieves and displays a particular set of information from Chronicles.

In your previous class, you looked at information in a variety of activities such as Chart Review, In Basket, Patient Lists, Study Review, and the ED Trackboard. Each of these activities uses records from the Report master file to determine what information will be presented.

1. Log in to **TRNCLN## Pediatrics** as your Andy pediatrician.
2. Open the appointment with your Isaac patient.
3. In Isaac's chart, go to **Chart Review** and select the **SnapShot** tab ().



The Three Styles

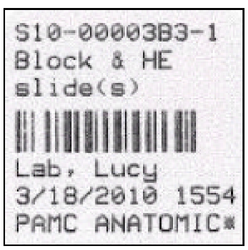
Each print group has one of three styles:

- Plain Text
- Rich Text
- Native HTML

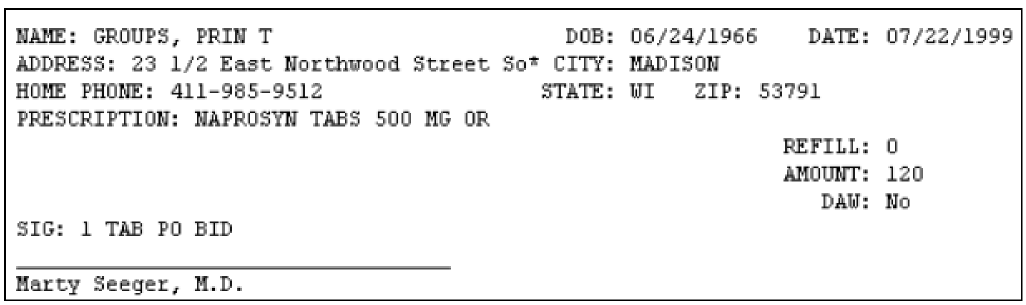
A print group's style determines where the print group can be used, its formatting options, appearance, and what additional functionality (such as hyperlinks) it can contain. As a rule, a report will only contain print groups of one style. Every print group in a report should be Plain Text, Rich Text, or Native HTML.

Plain Text

Plain Text is the oldest style of print group supported by Epic. It supports minimal formatting. Labels printed from Epic often use Plain Text style because of its fixed-width font.



S10-00003B3-1
Block & HE
slide(s)
Lab, Lucy
3/18/2010 1554
PAMC ANATOMIC*



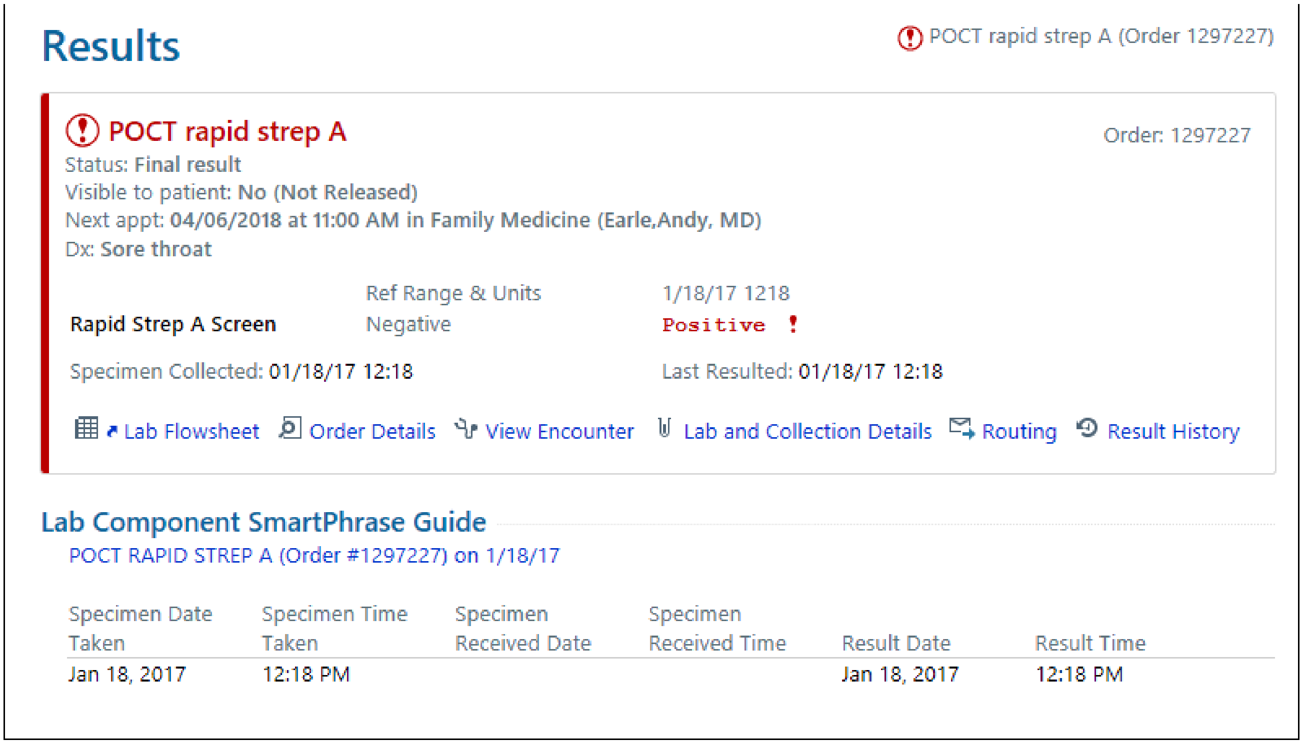
NAME: GROUPS, PRIN T DOB: 06/24/1966 DATE: 07/22/1999
ADDRESS: 23 1/2 East Northwood Street So* CITY: MADISON
HOME PHONE: 411-985-9512 STATE: WI ZIP: 53791
PRESCRIPTION: NAPROSYN TABS 500 MG OR
REFILL: 0
AMOUNT: 120
DAW: No
SIG: 1 TAB PO BID

Marty Seeger, M.D.

Rich Text

Rich Text print groups contain more formatting than Plain Text, such as different font choices and the ability to display information in multiple columns. These reports can contain images and links that perform actions in the system (such as acknowledging or cosigning orders).

Rich Text is the most common style for reports. You can find reports with this style in Chart Review, Summary, and many other activities in Hyperspace.


Results

POCT rapid strep A (Order 1297227)

POCT rapid strep A

Order: 1297227

Status: Final result
Visible to patient: No (Not Released)
Next appt: 04/06/2018 at 11:00 AM in Family Medicine (Earle,Andy, MD)
Dx: Sore throat

	Ref Range & Units	1/18/17 1218
Rapid Strep A Screen	Negative	Positive !

Specimen Collected: 01/18/17 12:18 Last Resulted: 01/18/17 12:18

Lab Flowsheet Order Details View Encounter Lab and Collection Details Routing Result History

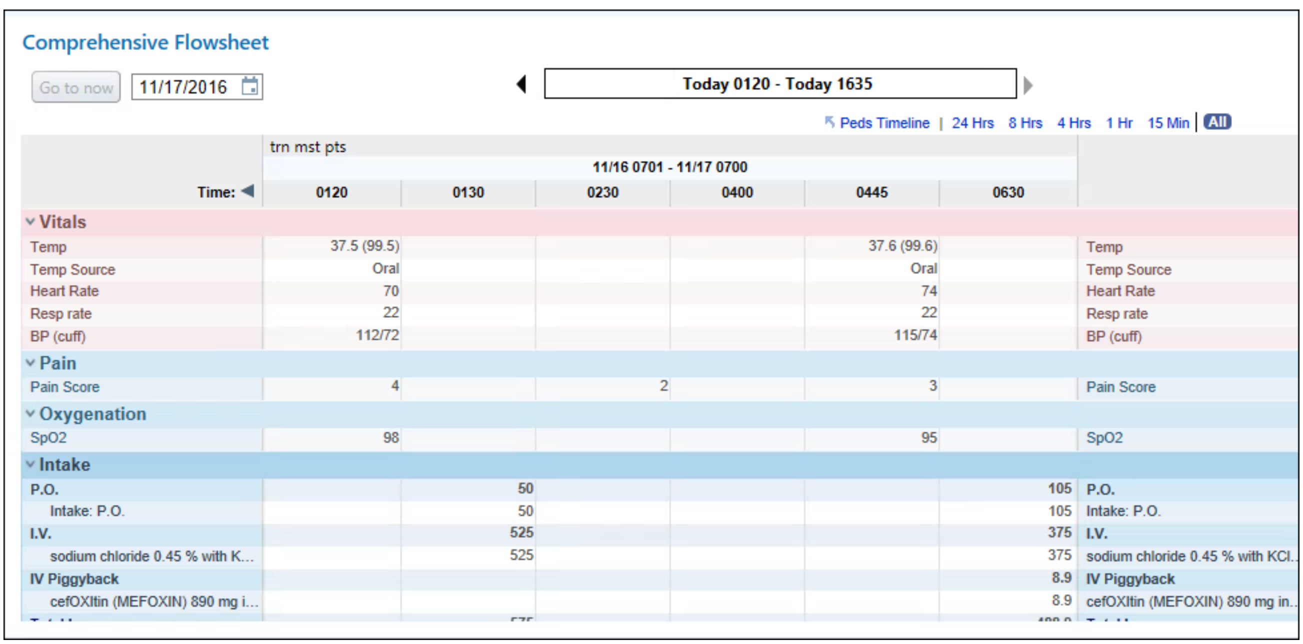
Lab Component SmartPhrase Guide

POCT RAPID STREP A (Order #1297227) on 1/18/17

Specimen Date Taken	Specimen Time Taken	Specimen Received Date	Specimen Received Time	Result Date	Result Time
Jan 18, 2017	12:18 PM			Jan 18, 2017	12:18 PM

Native HTML

Native HTML print groups support even more advanced formatting and functionality than Rich Text print groups. SnapShot reports and accordion reports are examples of Native HTML.


Comprehensive Flowsheet

Go to now 11/17/2016 Today 0120 - Today 1635

Peds Timeline | 24 Hrs 8 Hrs 4 Hrs 1 Hr 15 Min All

trn mst pts

11/16 0701 - 11/17 0700

Time:	0120	0130	0230	0400	0445	0630	
Vitals							
Temp	37.5 (99.5)				37.6 (99.6)		Temp
Temp Source	Oral				Oral		Temp Source
Heart Rate	70				74		Heart Rate
Resp rate	22				22		Resp rate
BP (cuff)	112/72				115/74		BP (cuff)
Pain							
Pain Score	4		2		3		Pain Score
Oxygenation							
SpO2	98				95		SpO2
Intake							
P.O.		50				105	P.O.
Intake: P.O.		50				105	Intake: P.O.
I.V.		525				375	I.V.
sodium chloride 0.45 % with K...		525				375	sodium chloride 0.45 % with KCl...
IV Piggyback						8.9	IV Piggyback
cefOXItin (MEFOXIN) 890 mg i...						8.9	cefOXItin (MEFOXIN) 890 mg in...

Edit a Report

The Foundation System includes many standard reports, but each organization can change the print groups its reports contain. When customizing a report, you have two options:

- Edit the print groups that make up an existing report
- Create a new report (possibly by duplicating an existing one) and make it available to a group of users

Before you decide which approach to take, you must determine if the change is appropriate for everyone who currently uses that report. If it is, you can simply edit the existing report. If only some users should see the change, then you should create a new report and distribute it to the appropriate users.

The steps to edit a report are:

1. Determine how a report needs to change.
   - What information is missing? What information needs to be removed?
2. Identify the report record you want to edit.
   - What is the record name and ID of the report?
3. Determine the type and style of the report.
   - Where in Hyperspace can the report display? What style of print groups does it use?
4. Identify (or create) the print groups that need to be added (if any).
   - Use the Report & Print Group Assistant if you know that the print group you want is already being used in another report at your organization.
   - Access print groups that meet your needs from the Epic Data Handbook or with a Galaxy search. Be sure to pick ones that match the type and style of your report.
5. Edit the report by adding, modifying, or removing print groups as needed.
6. Confirm that the report is linked in the appropriate place so that it affects the desired users.
   - You will learn how to do this in the Profiles chapter.

Step 1 - Determine How a Report Needs to Change

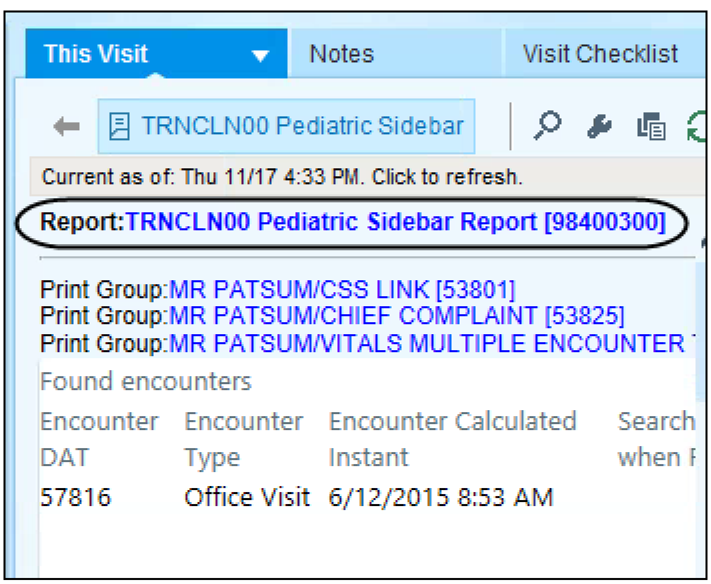
Feedback from users and analysts will help you determine how a report is going to change.

> Your pediatricians would like to see the registries to which a patient belongs. They have requested that the list of registries be part of the report they see in their sidebar.
>
> There is an existing sidebar report that was built specifically for pediatrics, so you can safely edit it without worrying about inadvertently affecting others. There is no need to create a new report.

Step 2 - Identify a Report and its Print Groups

Users see the display names for different reports and print groups. They typically do not see record names or ID numbers. However, administrators often need that specific information to successfully manage reports. That's where a tool called the Report & Print Group Assistant can come into play.

1. Select **Epic > Help > Session Information Report.**
2. In the Additional Support Reports section, click the **Show Report and Print Group IDs** link.
   - A new window appears indicating that report assistance is now enabled.
3. Click **OK**.
4. Look at the sidebar and identify the report name and ID.



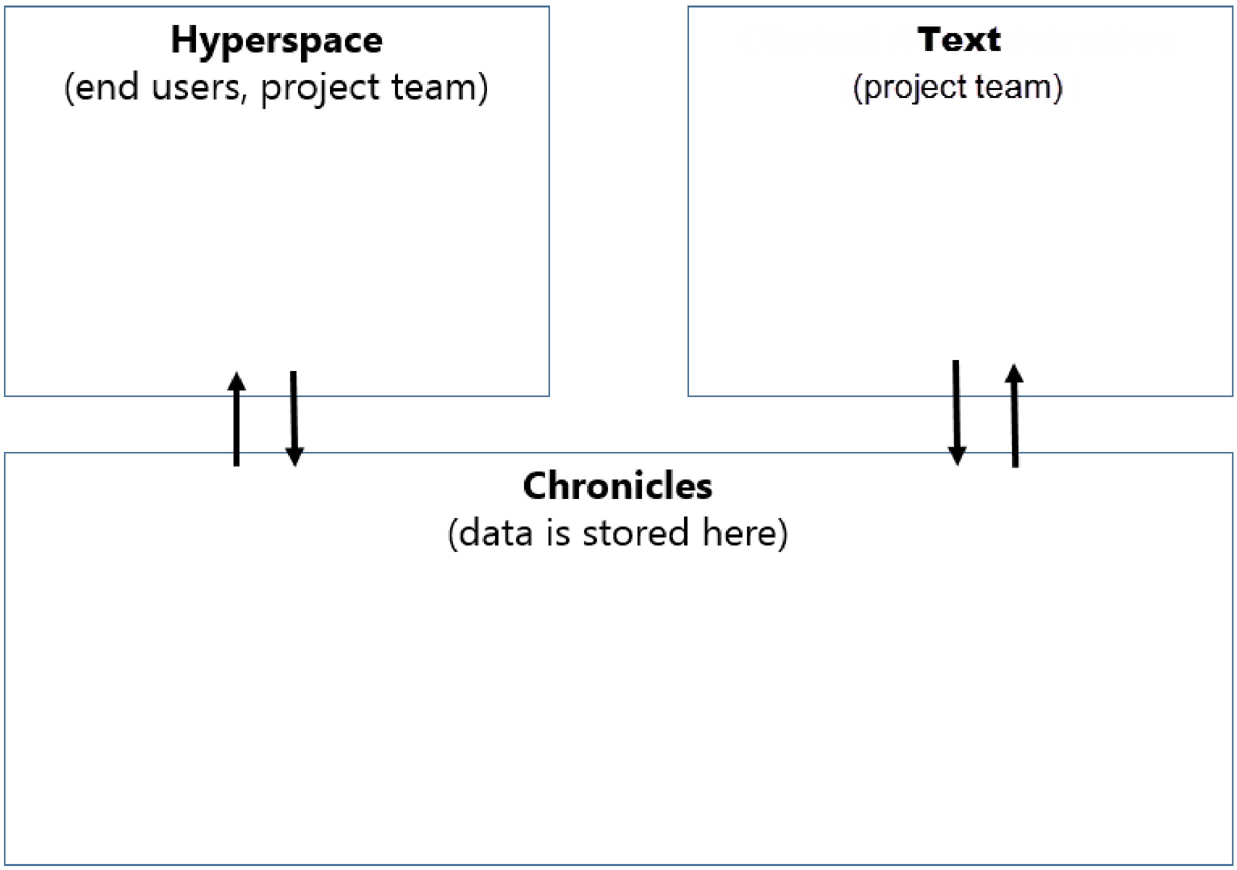
5. Document your report record name and ID:

Report Record Name	Report Record ID

Step 3 - Determine the Type and Style of a Report

Now that you know what report you are going to edit, you can access the record and determine its report type and the style of its print groups. Up to this point in class, you have only accessed records in Hyperspace. The records in the Report master file need to be edited using a different interface.

View and Edit Records in Text



In Hyperspace, builders can access some master files, but not all of them. Many master files are only accessible in a text-based session.

When you work with master files in Hyperspace (SmartTexts, for example), a window pops up which offers two choices: select an existing record or create a new one. You won't see those as distinct choices in text, but they are both possible every time you access a master file. The same build concepts hold true both in Hyperspace and on the text side.

Log in to Text

1. On the Citrix Receiver page, click on the Text icon.
2. At the password prompt, type "train" (you won't see the letters as you type) and press **ENTER**.
   - You are prompted to log in as a user.
3. Log in as the builder from your classroom information sheet.
   - **Epic user ID**: Enter your builder's ID and press **ENTER**.

- **Password**: Enter your builder's password "train" (you won't see the letters as you type) and press **ENTER**.

4. To move past the splash screen, press **ENTER**.
   - You are on the **Training Application Access** menu screen. It contains a series of options for accessing text-side administration options for different applications.
5. Choose **Clinical Administration** and press **ENTER**.
6. At the EpicCare screen, press any key to continue.
   - You have accessed the first screen in the desired set of menus. The first screen is generally referred to as the initial menu.
7. Select this option: **Reports, Print Groups**.
   - When selecting items from a menu on the text side, you can do so either alphabetically (by typing "report" and pressing **ENTER** to select the Reports, Print Groups submenu) or numerically (by typing the number that appears to the left of a menu option and pressing **ENTER**).
   - This training companion always refers to the paths by the names of the menu options, but you can use either method.

> **!** When working in text, after entering any information, you must press **ENTER** to move onward. In the steps from this point forward, you will not be directed to press **ENTER**, because it is assumed that you will do so.

8. Select **Reports (LRP).**

> **!** You can look up a record in text using either the ID or the name of that record.

9. At the **Report** master file prompt, open the sidebar report that your Andy pediatrician is currently using.
10. Use the arrow keys or the **TAB** key to move the cursor to the **Report type** field.
    - A report type determines where in Epic the report can potentially be used.
11. With your cursor still in the **Report type** field, use the **DOWN ARROW** to move through the choices on that field.

> What does the box around the third value indicate?
>
> <u>IT INDICATES THAT THERE ARE MORE VALUES IN THE LIST.</u>

12. What if you wanted to see the possible choices for an item? With your cursor still in the **Report type** field, press **SHIFT+F5**.
    - Help text appears:
    - With the help text open, notice where your cursor is located. If the cursor is still in the field where you pressed Shift+F5, this means the help text is only one screen long and your cursor is ready to move to a next field or enter information in a field
    - You can use the arrow keys, **PAGE UP**, and **PAGE DOWN** to see the remaining help text. When you are ready to leave the help text, press **ENTER**.
13. If you haven't left the help text, press **ENTER**. Then press **TAB**.

> Looking at this first screen of the report record, what type of report is this: Plain Text, Rich Text, or Native HTML?
>
> <u>NATIVE HTML</u>

Now that you know what type of report this is, you know which types of print groups you will need to add more information to this report.

14. Press **SHIFT+F7** to exit the record.
    - You are back at the **Report** master file prompt.
15. You need to find a print group that has the details you need for your pediatricians. To go back to the previous menu, press **ENTER**.
    - You are at the Reports, Print Groups menu.

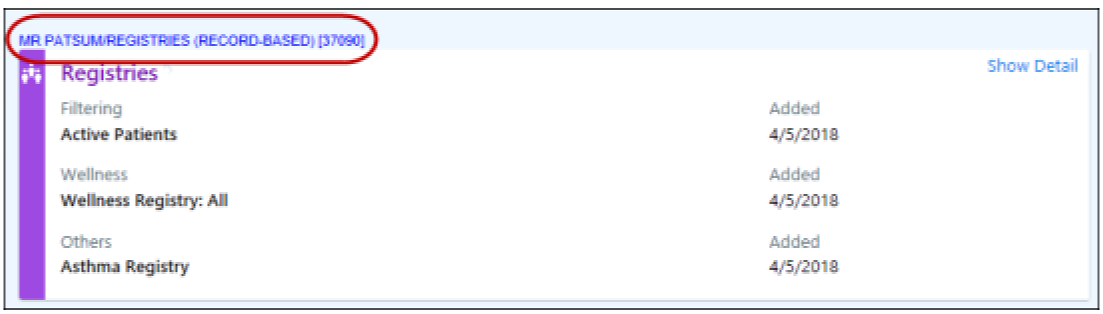
You could try searching the Print Group master file but that is often not the most efficient way to find a print group to use. Leave your text session open as you explore two other ways to find print groups.

Report Build Continued

Step 4 - Identify a Print Group Already Being Used

Often, you identify print groups by looking at existing build in the system. You will look in Isaac's chart and see if registries information is in an existing report.

1. Open the encounter with your Isaac patient and go to **Chart Review**.
2. Go to SnapShot .
   - When you were last in Hyperspace, you had enabled report assistance. You should see a lot of extra information in the report, including the names and IDs of its print groups.
   - If you don't see the print group names and IDs, go back to the **Session Information Report** and click **Show Report and Print Group IDs**.
3. In the SnapShot report, find the print group that contains information about registries. Make a note of the name and ID of the print group.



Print Group Record Name	Print Group Record ID

4. To turn off report assistance, return to **Session Information Report** and click **Show Report and Print Group IDs**.
5. Click **OK.**

Using Print Group Search

What if you aren't able to find a report that already contained a print group you needed? There is another resource to help you: Print Group Search.

You must have an active UserWeb account to access print group information on the UserWeb. To obtain a UserWeb account or if you experience trouble logging in, contact userwebaccounts@epic.com.

You won't need access for the next exercise, as the necessary screen shots are included.

Because not everyone in class can access the print group documentation, your instructor will demo the following steps to help you understand how it could be used to find new print groups.

There are thousands of standard, Epic-released records in the Print Group (LPG) master file, plus many more records that are customized and configured for the Foundation System. You can search for appropriate print groups in the Epic Data Handbook, which you will simulate in this exercise.

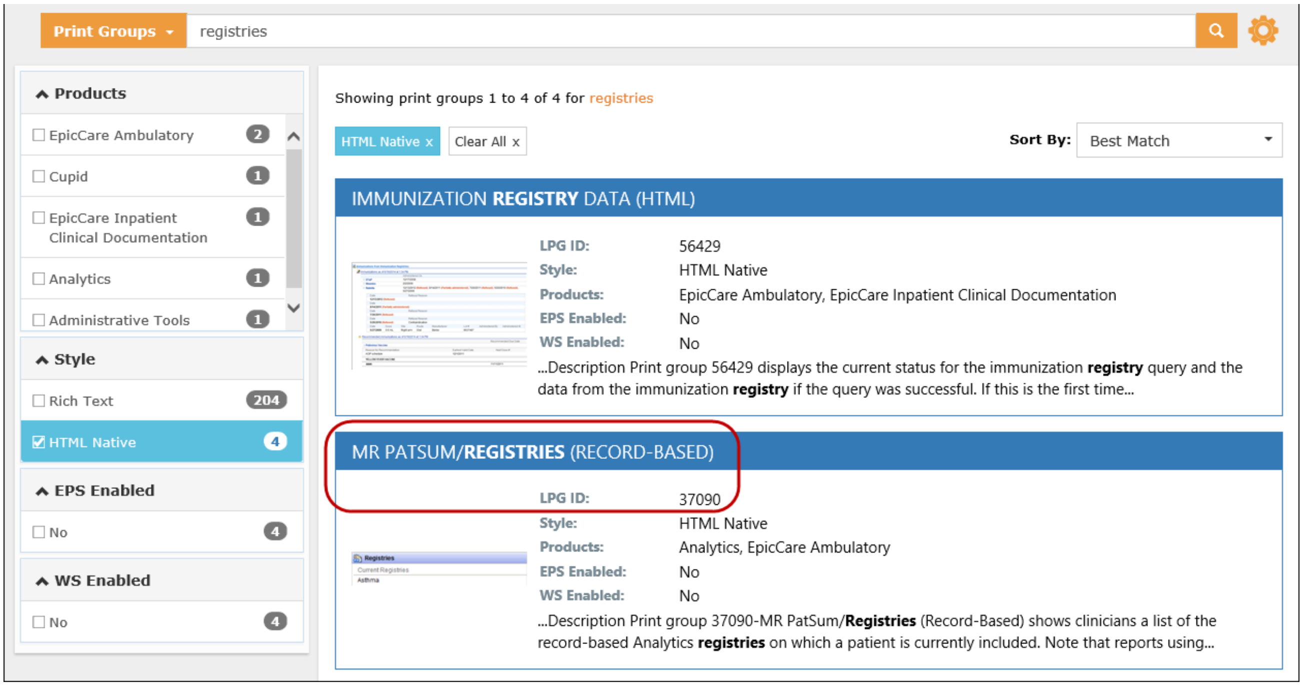
You can peruse all print groups that are created by Epic from the Epic Data Handbook. For each print group, you can see:

- Which category it belongs to (Patient List, Chart Review, etc.). This can help you determine where to use the print group.
- What style it is (Plain Text, Rich Text, or Native HTML).
- A preview of how the print group appears to end users.

Here are the steps to access this tool: (You will not complete these steps in class.)

1. Go to userweb.epic.com.
2. Log in to the UserWeb.
3. On the right, click the **Print Groups** link:

4. Search using different criteria including the style of the report. Searching for Native HTML reports that contain a term of "registries" produces the following results:



5. By clicking on a row, more details about a print group appear.

Step 5 - Add a Print Group to a Report

Now that you have identified the print groups you want to add, you can edit the report. To do this, you will return to your report record in text.

1. In **Clinical Administration**, you should be at the **Reports, Print Groups** menu.
2. Go to **Reports (LRP).**
3. There is a shortcut to open the last record you had open in a master file. Press **=** and then **ENTER**.
   - If you closed your text session and re-launched it, this will not work; you will need to enter the ID of your sidebar report.
4. If you use the **PAGE DOWN** key, you move to the next screen of items. **PAGE DOWN** two times to the third Report Definition screen.

```
Report Name                                                     Report ID
TRNCLN00 Pediatric Sidebar Report                                98400300
________________________ Report Definition ________________________

  Report Header (HTML):

  Report Footer (HTML): 48301-IP DEFAULT PAGE FOOTER
                                                              Left Column
  Left Column Print Groups        Right Column Print Groups    Width(%)
   1. 53801-MR PATSUM/CSS LINK
   2. 53825-MR PATSUM/CHIEF COMPLAINT
   3. 2105384501-MR PATSUM/VITALS MU*
   4. 53803-MR PATSUM/ALLERGIES
   5. 53809-MR PATSUM/MEDS
   6. 53802-MR PATSUM/PROBLEM LIST
   7. 53815-MR PATSUM/MEDICAL HISTORY
   8. 53816-MR PATSUM/SURGICAL HISTO*
   9. 53810-MR PatSum/Specialty Cmts
```

Use this screen to list the print groups that make up the report. The order that you list print groups on the Report Definition screen is the order they will appear to end users in Hyperspace.

When adding a new print group, determine where it should appear in relation to the other print groups that are already present.

> After speaking with your pediatricians, you agree the registries print group should appear beneath the print group for the patient's surgical history.
>
> This means you will insert the print group between rows 8 and 9.

5. **DOWN ARROW** so your cursor is on row 9.
6. Use the shortcut listed on the screen to insert a blank row.
7. In the blank row, enter the ID number of the patient registries print group: 37090.
8. You're done editing. Press **SHIFT+F7** to exit the report.

Step 6 - Link the Report to the Correct Profile

After editing a report, the final step is to make sure the report is linked to the correct profile record so that the appropriate users will see it.

For this example, you don't need to do this step because you edited the report currently being used by the pediatricians. In the next chapter, you will explore the Profile (LPR) master file, which is used to define many of the settings related to the clinical workspace, including the reports clinicians see in the sidebar and Chart Review.

View the Edited Report

1. Logged in to Hyperspace as your Andy pediatrician.
2. Confirm that you are still logged into TRNCLN00 Pediatrics.
3. Go to Isaac's encounter.
4. Refresh the sidebar report if needed.
   - You should see the patient registries that include Isaac.

Navigate Text Reference

Navigate Menus and Master File Prompts

Command	Key(s)	Explanation
Previous screen	**PAGE UP**	Moves to the previous menu
Return to main menu	opt	Brings you back to the initial menu. This will not work when you are in a record.
Re-open last accessed record	=	Opens the last record you accessed in that master file during the login session
List of all possible records	?	Lists all available records at any master file prompt.

Navigate within Records

Command	Key(s)	Explanation
Help	**SHIFT+F5**	A help window appears with information for the item the cursor is on. If this is a category or record list item, the list of choices appears at the bottom of the help text.
Exit	**SHIFT+F7**	Exits a record from any screen.
Next screen	**PAGE DOWN**	Moves to the first item of the next screen.
Previous screen	**PAGE UP**	Moves to the first item of the previous screen. From the first screen of a record, exits the record.
Next field	**TAB**	Moves to the next field (item).

Command	Key(s)	Explanation
Previous field	**LEFT ARROW**	Moves to the field to the left.
Field above or below	**UP ARROW** or **DOWN ARROW**	Moves to the field above or below the current field, or up and down in a list.
Delete line	**F1**	Deletes a value or an entire line of text.
Delete to end of line/field	**F2**	Erases everything from the cursor to the end of the field. Good for partially deleting characters in free text fields.
Restore	**F3**	Restores a field to the value that was there when you moved the cursor into the field. Does not work in all fields!
Scroll to top of list	**HOME+UP ARROW**	Scrolls to the top of a list. Useful for fields with long lists that are only partially displayed.
Scroll to bottom of list	**HOME+DOWN ARROW**	Scrolls to the bottom of a list. Useful for fields with long lists that are only partially displayed.
Display information about an item	**HOME+F7**or **HOME+F8**	Displays information about the item the cursor is on, such as the master file INI and item number.
Screen Fast Forward	**HOME+F9**	Searches down (from screen to screen) in a record for an item or a screen based on ID numbers or text.

After-Class Exercises

Exercise 1: Watch E-Learning Related to Navigating Clinical Administration

1. Log in to https://welearning.epic.com and watch the following e-learning lesson.
   - GEN602 Navigating Clinical Administration

The e-learning has an accompanying workbook. A link to download the workbook is available from the lesson's weLearning page.

When you are finished watching the e-learning lesson and completing its corresponding workbook, complete the following exercises in your Practice environment. (Do not complete these exercises in your Project environment.)

Exercise 2: Navigate in Text

In CLN251 and CLN252, you learn how to configure various records so that Hyperspace appears correctly for end users. These records live in different master files, and some of these master files are accessed through the Clinical Administration menu in text.

Access Clinical Administration in Text

> To complete the exercises, you will need your classroom information sheet from your CLN251/252 class. You can download this information sheet from Galaxy.
>
> **Epic Staff: Do NOT follow these instructions to access Clinical Administration**. Instead access the Epic Playground environment. When logged in, skip to Navigate Back and Forth in Menus.

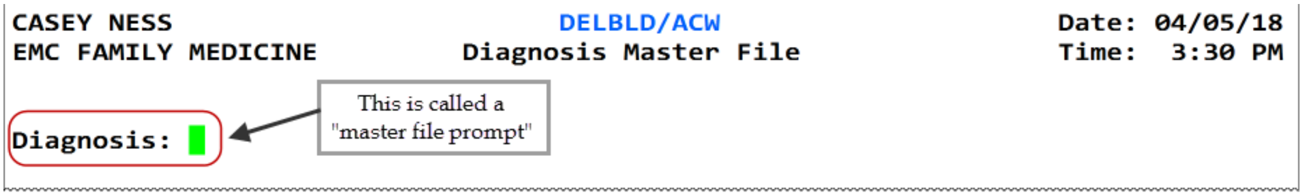
1. Open an internet browser (such as Internet Explorer) and navigate to https://access.epic.com. Log in with your UserWeb username and password.
   - If you don't see an app icon for a Practice environment, click the on the left, open the Epic 2018 Certification Environments menu, and add both the Practice Hyperspace and Text apps.
2. To access text, click the Practice Text icon.
3. At the password prompt, type "train" (you won't see the letters as you type) and press **ENTER**.
4. You must choose an application. Choose **Clinical Administration** and press **ENTER**.

5. You are then prompted to log in as a user. Log in as the builder from your classroom information sheet:
   - **Enter User ID**: Enter your builder's ID and press **ENTER**.
   - **Enter User Code**: Enter your builder's password, "train" and press **ENTER**. Note: As you type the password, you won't see the letters.
6. To move past the splash screen, press **ENTER**.
7. At the EpicCare screen, press any key to continue.
   - The name of this initial menu is **Clinical Administration**.

```
CASEY NESS                          DELBLD/ACW                        Date: 04/05/18
EMC FAMILY MEDICINE        Clinical Administration                    Time:  3:25 PM


    1. Management Options (System Definitions, Profiles, Utilities, etc.)

   Related Groups of Master Files
    2. Billing, Coverage                      15. Patient Lists
    3. Care Plans, Patient Education          16. Procedures, Scheduling
    4. Growth Charts                          17. Quality, Reporting Measures
    5. Decision Support                       18. Questionnaires, Images, Forms
    6. Diagnoses, CC/RFV, Concepts            19. Reports, Print Groups
    7. Episodes, Contexts                     20. Roles, Menus, Activities, etc.
    8. Facility Structure                     21. Security Management
    9. Flowsheets                             22. Users, Providers
   10. Labs, Results
   11. Meds, Allergens, Imm, etc.             Troubleshooting Options
   12. Navigators                             23. Troubleshooting Utilities
   13. Notes, Text Templates
   14. Order Transmittal


Enter the option of your choice:
```

Navigate Back and Forth in Menus

1. In this exercise, you will practice text-side navigation by exploring the Diagnosis (EDG) master file. On the text side, you use your keyboard to navigate, not your mouse. It may take a while to get used to not reaching for the mouse!
2. Your goal is to get to the Diagnosis master file. Look at the menu options. Notice that one of the options is **Diagnoses, CC/RFV, Concepts**.
   - This is an example of how certain master files are available via a submenu of related master files.
3. To open the **Diagnoses, CC/RFV, Concepts** submenu, enter the number of that menu item.
   - The choices that have an INI listed parenthetically are master file options.
4. To access the **Diagnoses (EDG)** master file, enter the number of that menu item.
   - The system is waiting for you to specify which diagnosis record to open.



5. Now, your goal is to explore navigating menus a little more. Imagine that you made a wrong choice on the previous menu and wanted to "back up" to it. Press **PAGE UP**.
   - Pressing **PAGE UP** moves you back one level in the menus. You should be at the **Diagnoses, Chief Complaint, Concepts** menu.
6. You might expect that **PAGE DOWN** would take you down a level (in this case, back to the **Diagnosis** master file prompt). Press **PAGE DOWN**.
   - The system backed up one level in the menus (back to the Clinical Administration menu). In this case, pressing **PAGE DOWN** does the same thing as **PAGE UP**.
7. As you already know, to move forward through the menus, you enter a selection and press **ENTER**. But, what happens if you press **ENTER** without having entered a menu selection? Press **ENTER** now.
   - The system backed up one level (just like if you pressed **PAGE UP** or **PAGE DOWN**). Because you backed up from the initial menu, you exited Clinical Administration entirely. You're now at the Training Application Access menu.
8. Enter the number for **Clinical Administration**.
9. At the EpicCare screen, press any key.
10. You know that on menus, you can enter numbers as options. You can also completion-match on the first word of menu options. Give it a try: enter "dia".
    - You are now at the **Diagnoses, Chief Complaint, Concepts** menu.
11. This menu has two options that begin with "dia." To see what happens when there are multiple matches, enter "dia".
    - You are prompted to choose the desired option of the two matches.
    - Completion matching is most efficient when the option you want is uniquely named on that menu.
12. Notice that the two matches from your completion matching have numbers by them. To open the Diagnosis master file, enter the appropriate corresponding number.
13. Imagine that you've been navigating amongst many menus and want to opt out, meaning you want to go back to your initial menu. Enter "opt".

"opt" works at menu prompts...

...and master file prompts.

```
Pattern Match...

          1. Diagnoses (EDG)
          2. Diagnosis Utilities

Enter the option of your choice: opt
```

```
Diagnosis: opt
```

- Because you entered "opt," you're taken to the Clinical Administration initial menu.

14. Over time, administrators memorize menu number paths that they use frequently. To explore how you can use "chaining" to bypass individual menu screens and go directly to your desired destination, enter "6,1".
    - You are taken directly to the **Diagnosis** master file prompt.

Navigate a Master File Prompt: Look Up and Open a Record

Figuratively speaking, you have walked up to the Chronicles filing cabinet, found the Diagnosis drawer (master file), and pulled it open. And now the system is asking "Which record do you want?"

1. You should be at the **Diagnosis** master file prompt.
2. Normally, you would completion match on the name of the record you want or enter its ID. For the sake of learning, you will explore other lookup options. To see a list of records, enter "?".
    - You are prompted to see a list of diagnosis records.
3. Enter "yes" (or enter "y").
    - You are prompted to view the list of diagnosis records from the beginning (A to Z).
4. On top of the word "beginning," enter any letter of the alphabet.
    - What appears is an alphabetical list of diagnosis records that begin with the letter you selected
    - At the bottom of the screen, you are presented two choices: look at more records or stop the list.
5. You want to see more records, so press **ENTER**.
    - The screen advances to show the next set of diagnoses in the list.
    - Note that you cannot back up the list (show the previous list of records). Pressing **PAGE UP** would advance the list as if you pressed **ENTER**.

6. Write the name and code of a diagnosis record that interests you. If it is a long name, just write the first word or two.

Name:	Code (ID):

7. To stop the list and return to the master file prompt, enter an asterisk.
8. At the **Diagnosis** master file prompt, enter the code for the record you want to open.
   - You are presented with a table of contacts for the record. The top row is the most recent version of the record. As a rule, you want to edit the most recent contact.
   - The prompt allows you to either open an existing contact by entering its number or create a new contact by entering today's date.
9. At the prompt, enter the contact number from the top row.
   - The record opens, showing the first screen of items. Many of the items have values.

Navigate Within a Record

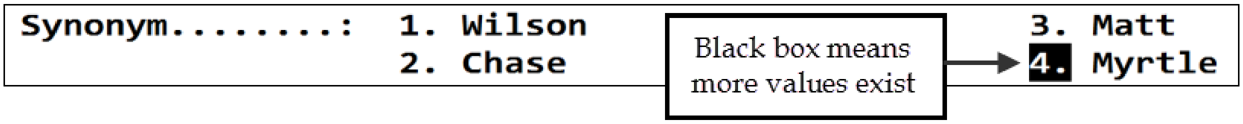
Now that you are in a record, instead of selecting choices from menus, you will move from item to item and from screen to screen.

> **!** When in a record, entering "opt" or "?" does NOT work. Be aware that if you do this while your cursor is on an item that allows a free text value, you will have changed the value. For example, if you opened a diagnosis record and typed "opt" in the **Synonym** field, you either added a synonym of "opt" or typed over the existing value.

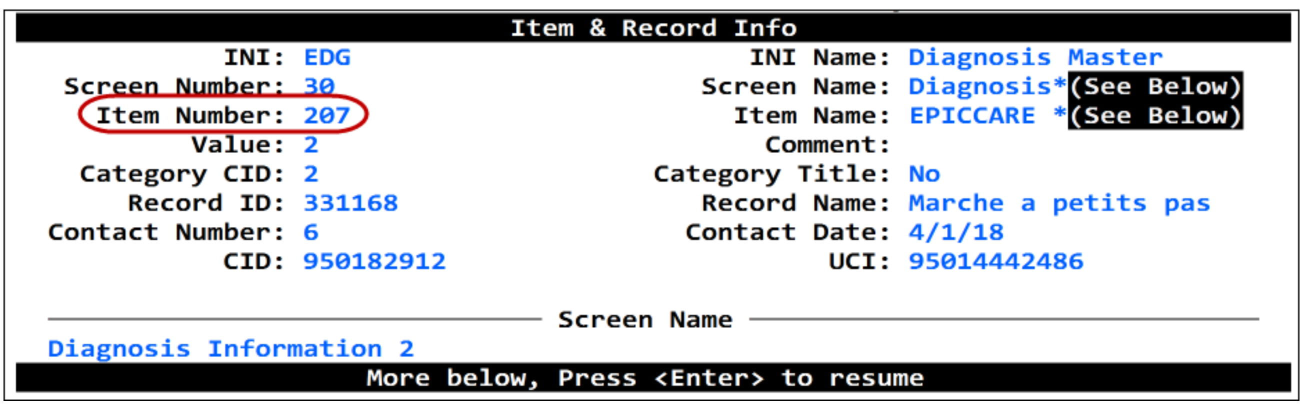
1. Your cursor is currently on the **ID** field. Press **TAB** three times.
   - Pressing **TAB** moves your cursor from field to field. Epic's developers define which field is considered "next."
2. To move to a previous field, you need to use the arrow keys. Press the **LEFT ARROW** key.
   - **LEFT ARROW** moves your cursor back to the previous field.
3. Use the **DOWN ARROW** key to move the cursor to the **Synonym** field.
   - This item is a multiple value item, meaning you can enter more than one value. Because of this, you see the numeral 1.
4. The value for the **Synonym** item is free text. For the sake of experimentation, enter FIVE synonyms that are random words (for example, the names of family members or pets).

- After synonym 4, the fields "roll up" and you see only value 5.
- Depending on how many synonyms this procedure already had, you may see different numeric values.

5. To see synonyms 1 through 4, press the **UP ARROW**.



6. To delete an entire value, press **F1**. Delete value 4.
   - Be cautious about using **F1**. Its action cannot always be undone. (In certain fields, prior to leaving the field, you can restore the value by pressing the asterisk on your number keypad.)
   - You can press **DELETE** or **BACKSPACE** instead of **F1** to remove an entire value.
7. To move to the next screen, press **PAGE DOWN**.
8. Press **TAB** until the cursor is in **Clinically Inactive?** field.
9. To determine the item number of a specific item in a record, you can press **HOME** and then **F8**. With your cursor in the **Clinically Inactive?** field, try this now.
10. Item information appears:



- Write down the item number: _________

11. Press **ENTER** twice to leave the Item Information window, and then minimize the text session.

View a Record in Hyperspace

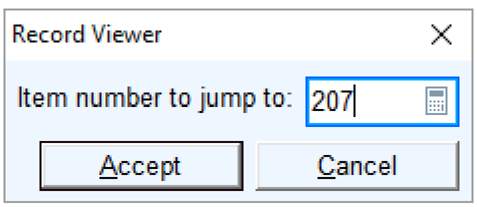
An effective way to quickly view a diagnosis record (or any other record) is using Record Viewer.

1. Back on your internet browser screen, open up your Hyperspace Practice environment (you might have to re-enter your UserWeb login information if you got timed out).
2. Log in to Hyperspace as your builder.

3. In the Hyperspace toolbar, click **Record Viewer**.
   - You learned how to use Record Viewer in an earlier chapter.
4. Enter the following:
   - **INI**: EDG
   - **ID**: <the name or ID of the diagnosis record you chose earlier>
   - **Include blanks**: Check this box so you will see all items, even those for which there are no values.
5. Click **View**.
6. Select the most recent contact of your diagnosis and click **Accept**.
7. Click **Jump To Item** on the activity toolbar.

> If you don't know an item number, pressing **CTRL+F** is useful for looking up an item by its name.

8. For **Item number to jump to**, enter the item number you wrote down for **Clinically Inactive?.**



9. Click **Accept**.
   - The item you jumped to is now at the top of the viewer.
10. Compare this screen with your minimized Clinical Administration view of the same diagnosis.
    - Are the values for this item the same?
    - While some records must be edited in text instead of Hyperspace, all records can be viewed in Hyperspace. The same information about a given record can be seen in different places.
11. Log out of Hyperspace.
12. Return to your text session and your diagnosis record.
13. Press **SHIFT+F7** to exit the record.
    - This command exits a record, regardless of which screen of the record you are on.

Exercise 3: Identify Keystroke Commands

List the keystroke commands next to what they do. Some commands will be used more than once, and some outcomes can be generated by more than one command.

Command	Keystroke
Return to the Clinical Administration menu from a master file prompt.	OPT
Return to the Clinical Administration menu from a menu prompt.	OPT
Return to the previous menu.	PAGE UP
Go to the next screen within a record.	PAGE DOWN
Go to the previous screen within a record.	PAGE UP
Move to the next field in a record.	TAB
Move to the previous field in a record.	LEFT ARROW
Get a list of choices at a master file prompt.	?
Get a list of choices or help text for an item.	SHIFT+F5
Exit a record, no matter what screen you are on.	SHIFT+F7
Delete a value for an item.	F1
Go back into a record you just exited.	=

Reviewing the Chapter

Review Questions

1. A report is a collection of individual PRINT GROUPS.
2. Where can you look up and view samples of Epic-released print groups?
   a. Nova
   b. Epic Data Handbook
   c. Userweb Forums
   d. Session Information Report

B: EPIC DATA HANDBOOK

3. What activity should an end user use to view the names and ID numbers of print groups in Hyperspace?
   a. Reporting Workbench
   b. Print Group Information
   c. Session Information Report
   d. Record Viewer

C: SESSION INFORMATION REPORT

4. True or False: If you need to build a report that is similar to another one, it is fastest to duplicate the report and edit the duplicate.

TRUE!

5. True or False: Administrators in charge of editing master file records can only do so in text.

FALSE. SOME MASTER FILES MAY BE ACCESSED AND EDITED FROM HYPERSPACE.

6. How can you quickly exit a record from any screen?
   a. Shift+F5
   b. Shift+F7
   c. =
   d. Tab

B: SHIFT+F7

7. How do you see help text information in a text session? How do you leave the help text?
   a. Shift+F5; Enter
   b. Shift+F7; Tab

c. =; Tab
d. Tab; Enter

A: SHIFT+F5; ENTER

Review Key

1. A report is a collection of individual <u>PRINT GROUPS.</u>
2. Where can you look up and view samples of Epic-released print groups?
   a. Nova
   b. Epic Data Handbook
   c. Userweb Forums
   d. Session Information Report

<u>B: EPIC DATA HANDBOOK</u>

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   c. Session Information Report
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<u>TRUE!</u>

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<u>FALSE. SOME MASTER FILES MAY BE ACCESSED AND EDITED FROM HYPERSPACE.</u>

6. How can you quickly exit a record from any screen?
   a. Shift+F5
   b. Shift+F7
   c. =
   d. Tab

<u>B: SHIFT+F7</u>

7. How do you see help text information in a text session? How do you leave the help text?
   a. Shift+F5; Enter
   b. Shift+F7; Tab
   c. =; Tab
   d. Tab; Enter

<u>A: SHIFT+F5; ENTER</u>

Study Checklist

Make sure you can define the following key terms:

- ☐ Report
- ☐ Print group
- ☐ Native HTML
- ☐ Rich Text
- ☐ Plain Text

Make sure you can perform the following tasks:

- ☐ Log in to text
- ☐ Navigate menus
- ☐ Navigate within records
- ☐ How to set up end users to see reports
- ☐ How to search for print groups

Make sure you fully understand and can explain the following concepts:

- ☐ Explain the benefits of looking for print groups in the Data Handbook on the UserWeb

Lesson 4: Profiles: Configure an End User's Options within Activities

Profiles: Configure an End User's Options within Activities

Profile Records: Configure an End User's Options within Activities

In this chapter, you will see how records in the Profile (LPR) master file allow the details of Hyperspace to differ for various users, particularly users with different specialties.

One example is the SnapShot activity. While both an obstetrician and a cardiologist have access to this activity and find it in the same place in Hyperspace, the obstetrician may want to see OB history reports, while the cardiologist may want to see an EKG results report. Profiles are the tools that make this flexibility possible.

At least one profile record (the one that is linked to System Definitions) will affect any given user, but up to six can work together to customize a user's experience.

Profile records are primarily used by Epic's clinical applications. Users who only work with Epic's billing or access management applications typically don't need profiles. Almost every clinical activity within a patient's chart is affected by profile settings. Some settings controlled by profiles include:

- The reports available in the SnapShot and Summary activities
- The tabs and filters in the Chart Review activity
- The preference lists users see when they search for new orders

The list goes on and on. There are over a thousand settings that can be made in a profile record on over 300 screens.

What Do Profiles Control?

Profile records configure options within activities a user can access. If a user can access an activity, the system looks to the profiles to determine how that activity looks and what options are available within that activity.

Exercise 1: Observe Profile Settings in Hyperspace

In this exercise, you will work with a partner to make observations and draw conclusions about the profile settings for two different users.

With your partner, determine who will log in as their Andy pediatrician (Partner A) and who will log in as a Foundation System obstetrician user (Partner B).

1. **Partner A:** Log in to Hyperspace as your Andy pediatrician, accepting your default pediatrics login department.
2. **Partner B:** Log in to Hyperspace:
   - **User ID**: obgynmd
   - **Password**: epic
3. **A & B:** Confirm that you are logged into your appropriate department for this exercise.
   - **A:** TRNCLN## Pediatrics
   - **B:** EMC OBGYN CLINIC

> ! Partner B's OBGYN user will not have patients on the schedule.

4. **A & B:** Complete the following steps to open an encounter with each of your assigned Karly patients:
   - **A:** Go to the schedule and double-click your Karly patient's appointment.
   - **B:** Go to **Epic button > Patient Care > Encounter** and look up your Karly patient. You can accept one of her highlighted appointments.
5. **A& B:** In Karly's chart, click on the  in the visit taskbar at the bottom of the patient workspace.
   - The Order Search browser opens.
   - Confirm you are on the Browse tab.

What differences do you see between Andy's preference lists and the Foundation System obstetrician's preference lists? (Hint: expand the Imaging and Procedures preference lists to get a better idea of what they contain.)

OB HAS MORE ORDERS APPROPRIATE FOR THE OB SPECIALTY

6. **A & B:** Cancel out of the Preference List Browser.
7. **A & B:** Open Chart Review and compare your Chart Review tabs with your partner's.

What differences do you see between Andy's Chart Review tabs and the Foundation System obstetrician's Chart Review tabs?

DIFFERENT ORDER, NOT THE SAME COMBINATION OF TABS

8. **A:** On the Misc Reports tab, double-click the report called "Profiles Control." Read the effect of profiles on Chart Review tabs.
9. **A & B:** Open SnapShot in Chart Review. Compare the options within your SnapShot activity with your partner's.

What differences do you see between Andy's SnapShot and the Foundation System obstetrician's SnapShot?

DIFFERENT REPORT OPEN BY DEFAULT, DIFFERENT REPORTS AVAILABLE AS BUTTONS

10. **B:** In the Report search field on the right, search for the report "Profiles Also Control" Read the information about the effect of profiles on reports.
11. **A & B:** With your partner, draw some conclusions about the profile records affecting Andy and the Foundation System obstetrician. You have completed this exercise. Wait for your instructor.

Identify Profiles Affecting a User

As the pediatrician and the obstetrician, you explored several settings controlled by profile records.

1. Still logged in as your Andy pediatrician or obstetrician user, navigate to **Epic** > **Help** > **Session Information Report.**
2. Under the Profile Compilation heading, determine which profiles are impacting your user and make some observations with your instructor.

How many profile records are impacting your user? Your partner's user?

ANDY PEDIATRICIAN IS IMPACTED BY 4 PROFILE RECORDS; THE OBSTETRICIAN IS IMPACTED BY 5 DIFFERENT PROFILE RECORDS.

What does this tell you about what you observed in Hyperspace earlier regarding Chart Review tabs, preferences lists, and SnapShot reports?

THESE SETTINGS MIGHT BE COMING FROM DIFFERENT RECORDS.

Investigate Profile Settings in Text

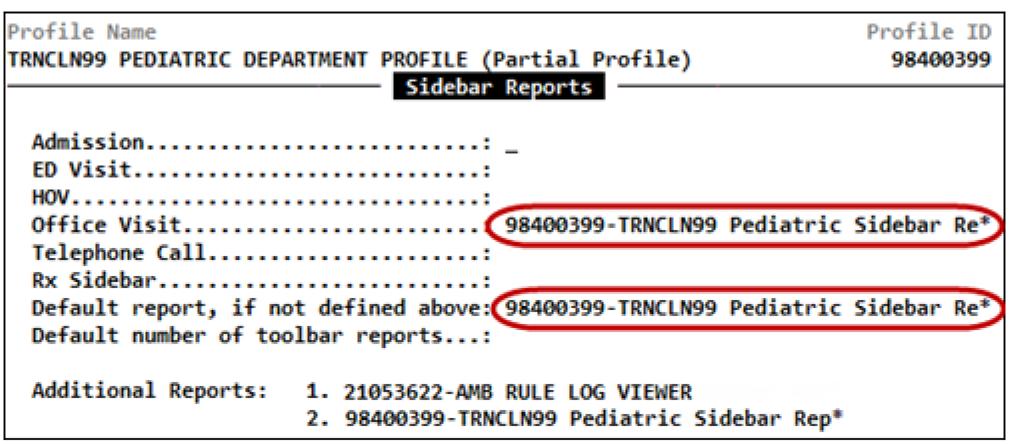
In Session Information Report, you saw that there are several profile records that can impact a user at any given time. Now you will examine the screens in profile records where those settings are made.

1. Log in to text as your builder.
2. Go to **Clinical Administration > Management Options > Profiles**
3. Open your TRNCLN## PEDIATRIC DEPARTMENT PROFILE (984003##).

Profile records contain over one thousand items. To make navigation easier among so many screens, profile records have a menu to allow users to quickly jump between related groups of profile items.

4. On the profile record's menu, select **Chart Review, Summary Report**.
5. **PAGE DOWN** to the **Sidebar Reports** screen.

The Sidebar Reports screen is where you specify the default report that appears in the sidebar activity. In the previous chapter, you edited the sidebar report by adding a registries print group. Your profile is linked to that report.



6. Stay in the TRNCLN## PEDIATRIC DEPARTMENT PROFILE while your instructor opens another profile record.

Instructor Demo: Identify the Source of Settings

As we saw earlier using Session Information Report, not all of the profile settings that affected the users in your exploration come from one profile record.

1. Open the TRNCLN## PEDS SECURITY CLASS PROFILE (984004##).
2. Select **Chart Review, Summary Report**.
3. Page down to the **Chart Review Tabs** screen.
   - It's possible to specify which tabs appear and their order here.
4. **SHIFT+F7** to return to the Profile record's main menu.
5. Select **Procedure, Scheduling, and Task** > **Preference List, Order Search**.
6. Page down to the **Outpatient Orders Preference Lists** screen.

> In this profile, there are no defined Outpatient Orders Preference Lists. However, in your previous exercise, Andy pediatrician had defined preference lists. What does this tell you?
>
> THE PREFERENCE LISTS ARE COMING FROM ANOTHER PROFILE RECORD.

7. Completely close this profile record.

Your instructor will show you one more profile linked to System Definitions. This profile record is where those preference lists were coming from.

8. Open profile record 1, named System Definitions as a reminder that this profile is linked to System Definitions.
9. Select **Procedure, Scheduling, Task** > **Preference List, Order Search**.
10. Page down to the Outpatient Orders Preference Lists screen.
    - This profile is defining the preference lists affecting your Andy pediatrician.
11. Return to the profile main menu and select **Chart Review, Summary Report**.
12. Page down to the Sidebar Reports screen.

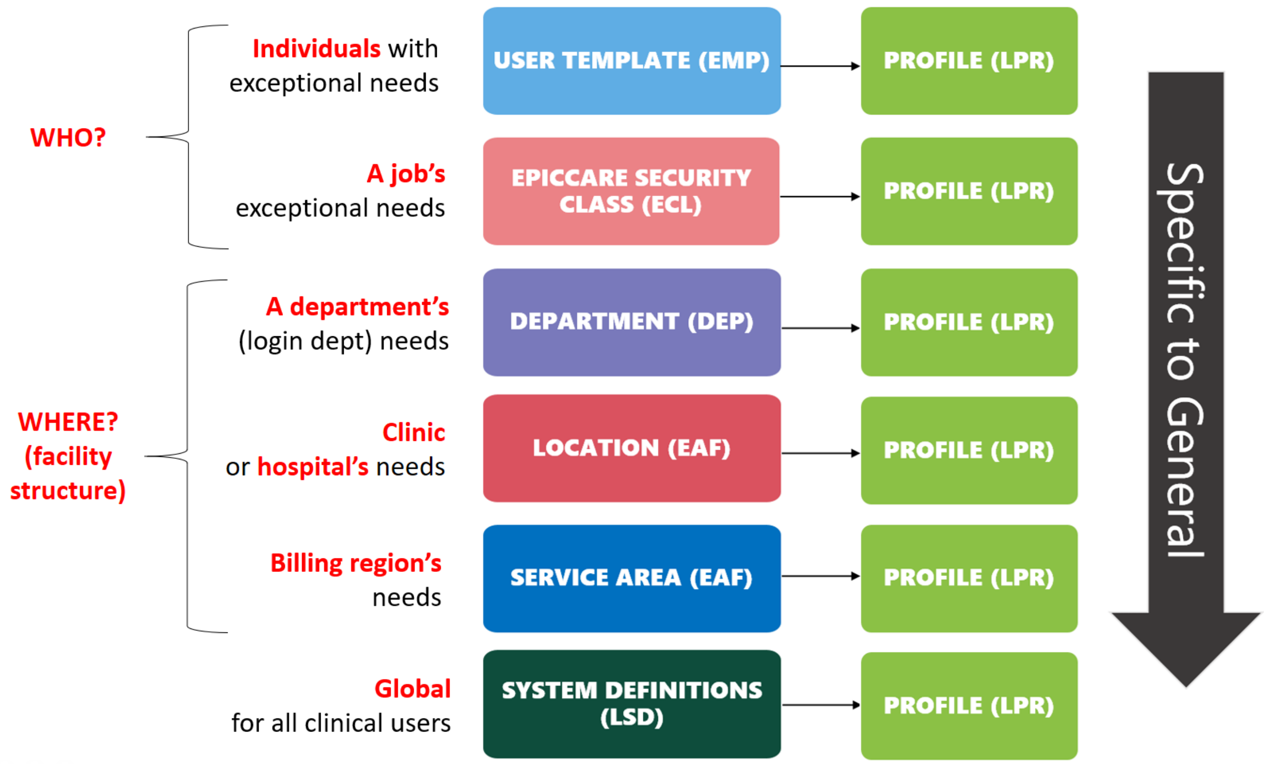
With your instructor, compare the Sidebar Reports screen in your TRNCLN## Pediatric Department Profile and the System Definitions profile. Which Sidebar is your Andy pediatrician seeing?

TRNCLN## PEDIATRIC SIDEBAR REPORT (THE ONE DEFINED IN THE TRNCLN## PEDIATRIC DEPARTMENT PROFILE)

13. Exit the record.

The Profile Hierarchy and Compiled Profiles

The "options within activities" that affect users can come from multiple profile records. Profiles can be linked to six different records in what is called the profile hierarchy. Epic looks at each of these levels to create a unique collection of settings called a compiled profile.



Where Can Profiles Be Linked?

A user can be affected by up to six different records in the Profile (LPR) master file. These profile records can be linked to:

- **User/User Template**: For profile settings common to a specialized group of users.
- **EpicCare Security Class**: For profile settings common to people with the same job duties or scope of practice, like all ambulatory physicians or all pharmacy technicians.
- **Login Department**: For profile settings common to people who have different job duties but who work in the same department.
- **Login Location**: For profile settings common to everyone who works in a particular hospital or clinic, regardless of job duties.
- **Login Service Area**: For profile settings common to everyone who works in a particular region or group of hospitals and/or clinics, regardless of job duties.
- **System Definitions**: For global profile settings that apply to every clinical user in your system unless overridden at a more specific level.

A profile is a profile is a profile...

Just like other records within the same master file, every profile record contains the same items.

Any profile record can be linked to any level of the profile hierarchy. There is not a setting in a profile record in which you specify that it can only be linked to certain records/levels.

Which Profiles Impact a User?

With six different profiles potentially affecting a user, and those profiles being linked to six different entities, it would be time consuming to consult the records at each level of the hierarchy to track down the specific profiles affecting any one user.

Remember using the Session Information Report earlier? The Session Information Report shows which profiles are currently affecting the logged-in user.

Under the Profile Compilation heading, you can find a list of which profiles are linked to the different levels in the hierarchy. You can also see an ID number for the compiled profile - the combination of settings from all levels.

How Do the Profiles Affecting a User Interact?

With up to six profile records impacting a user, how does the system decide which options within activities will appear in Hyperspace? Let's learn how profiles interact with each other.

Profiles Compile Item-by-Item

Epic compiles settings across profiles on an item-by-item basis. If you set a particular item on a screen in a user template profile but leave the rest of the screen blank, the system takes the one setting from the user template profile; then, it will look to the other levels of the profile hierarchy for the remaining items that were left blank.

If the same item in a profile record has different corresponding values in multiple profiles, the values in the more specific profile level take precedence over more generic settings.

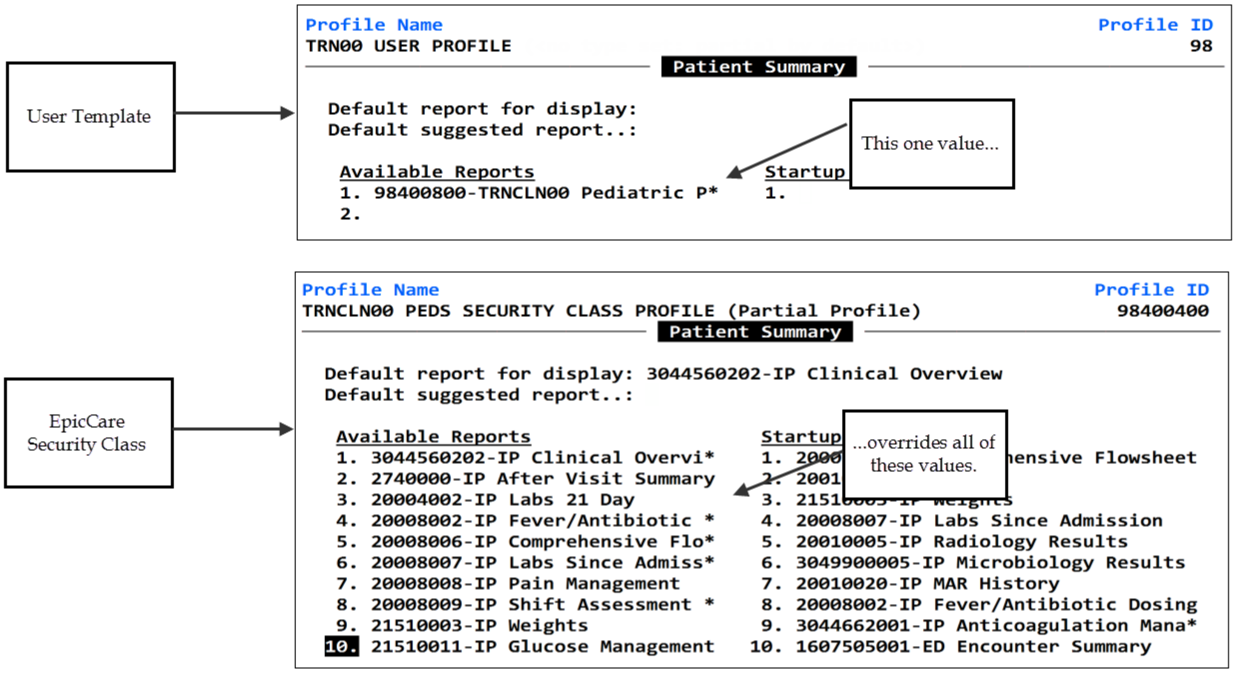
What do you think is the most efficient level to start profile build, and why?
THE MOST GENERAL LEVEL IN THE HIERARCHY TO MAKE SETTINGS THAT WILL APPLY TO THE MOST PEOPLE. THEN YOU CAN BUILD FOR THE EXCEPTIONS TO THOSE SETTINGS AT MORE SPECIFIC LEVELS IN THE HIERARCHY.

Multiple Response Items are All-or-Nothing

When compiling settings for multiple-response items (such as a list of reports), Epic takes all the values specified in the most specific profile in the hierarchy that has any value or values. The system does not combine the values from multiple profile records.

The TRNCLN## PEDS SECURITY CLASS PROFILE record is linked to the EpicCare security class affecting your pediatricians. In this profile, the **Available reports** item on the Patient Summary screen has 94 reports listed.

Imagine you linked a profile to the user template affecting your pediatricians. If you enter only one available report on the Patient Summary screen, your pediatricians will have only this report available. They will lose the 94 reports they were previously getting from the profile linked to their security class.



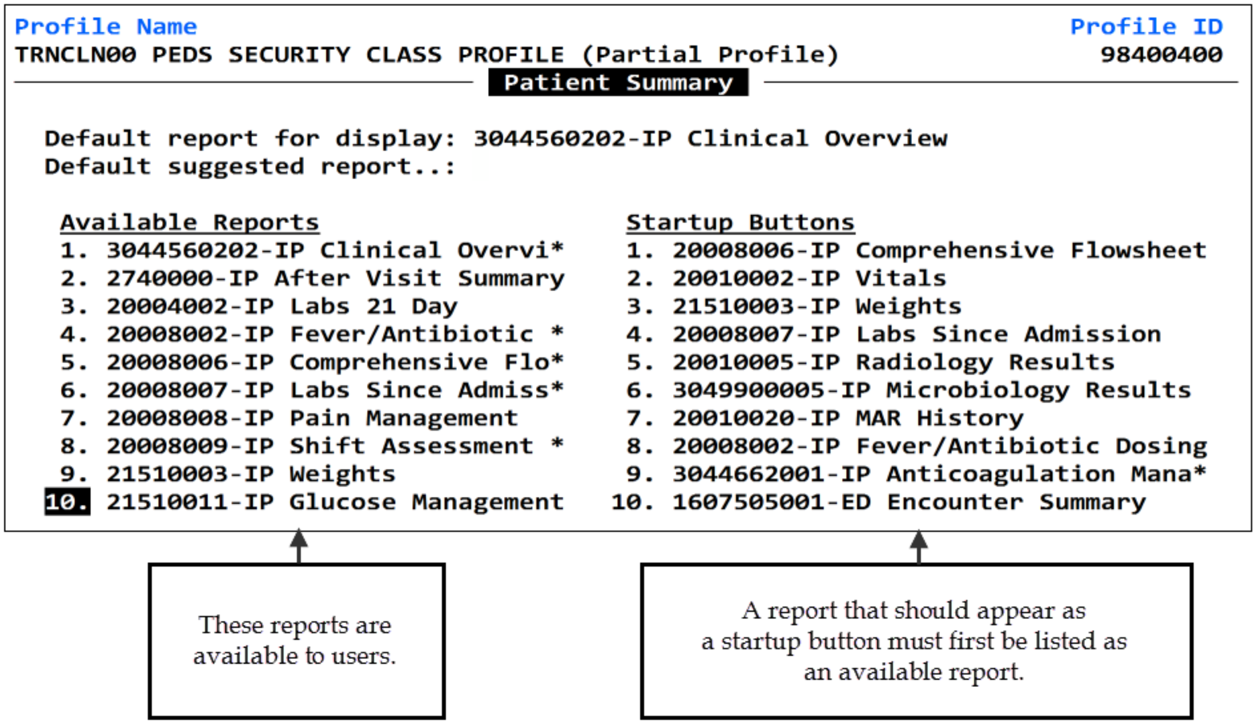
Note that related groups (items that are arranged like "tables") also work as described here. If you enter a single row of values in a table in one profile, it will override the entire table of values in a profile lower in the hierarchy.

Not every multiple-response and related-group item works as described above. Your organization can actually reverse this logic for certain items and tables, so that the system uses all the values from the least specific profile record in the hierarchy. In the Foundation System, there are only a handful of items that work this way (around 20 out of nearly 2,000). Talk to your Epic representative for more details.

Some Settings Affect Other Settings

Some profile settings are affected or limited by other settings, which can result in interesting interactions when Epic compiles profiles for a user.

For example, the following screen shot of the Patient Summary screen in a profile record shows two related fields.



The **Startup Buttons** field is limited to (i.e. a subset of) the values in the **Available Reports** field. If a profile has nothing listed for Available Reports, then you can't enter anything for Startup Buttons.

If two or more items in a profile directly affect each other, specify all of the related items in the same profile record. Allowing the system to compile related items across multiple levels of the hierarchy can cause unwanted results.

Some "Backup" Settings Come from System Definitions

When your instructor showed you the profile linked to System Definitions, you might have noticed that some settings were still blank. When this happens, the defaults are determined by values set in the System Definitions (LSD) master file, or by hidden defaults. The system first searches item by item through the profile (LPR) hierarchy for values, and then LSD fills in some blanks. Hidden defaults take care of any remaining items.

Make Changes to a Compiled Profile

You have two goals when determining how to change a profile.

1. Make the right changes for the users who need them.
2. Don't make changes for users who don't need them.

By making profile settings at the most general level in the hierarchy possible, you can save yourself time building and maintaining the profiles you create. Building at the most general level possible is therefore the most efficient way to ensure successful leveraging of the profile hierarchy.

The following questions will help you identify the best level to deliver changes to profile settings:

- What setting needs to change?
- Which users need the change?
- What do the users who need the change have in common?
- What's the most general hierarchy level that could deliver this change to the correct users?

Identify the Best Level to Deliver Changes

Answer the questions in the note taking table after analyzing the scenario below. Focus on achieving the two goals for making profile changes.

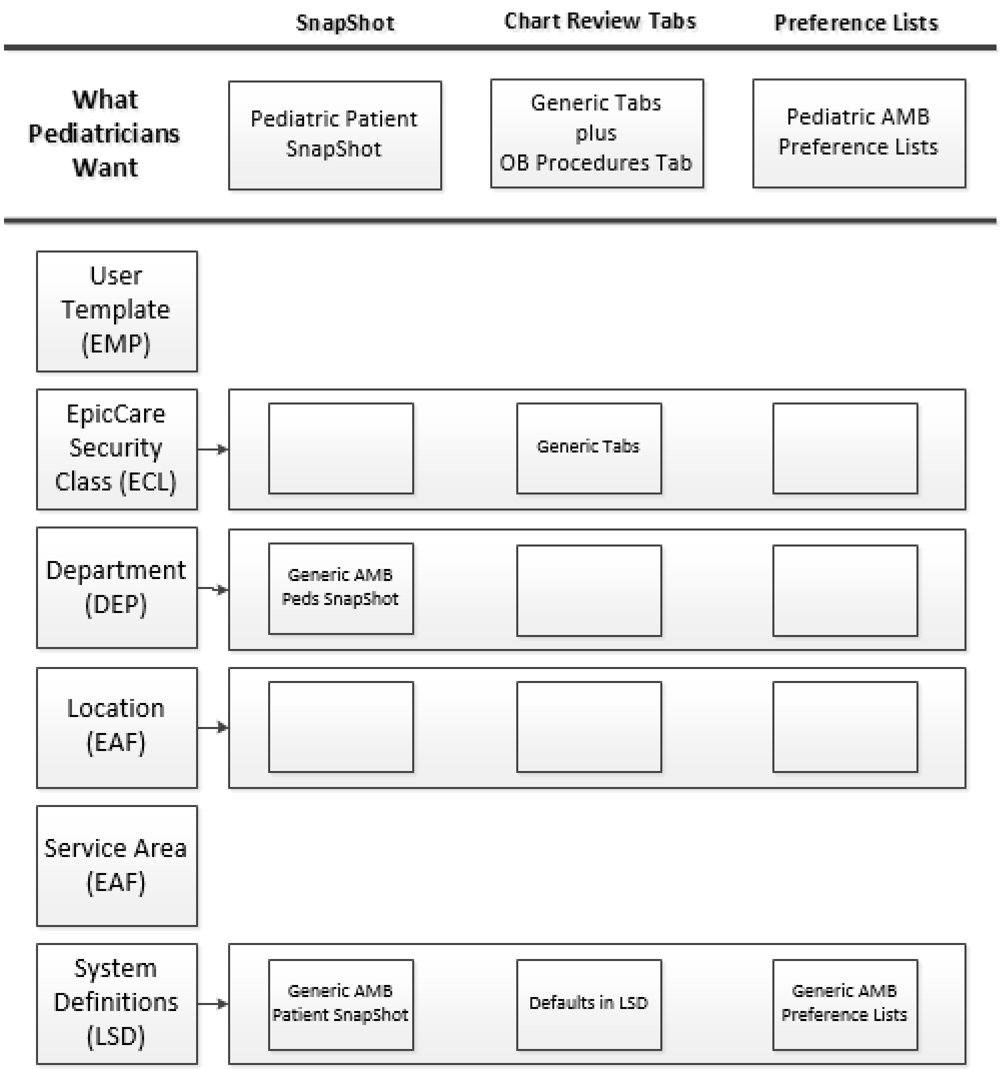
You have discussed the current profile setup with your pediatricians. They are happy with most of their settings.

However, they would like to see a pediatric-specific SnapShot and pediatric-focused preference lists. In addition to the Chart Review tabs they currently see, they would also like to see a tab for OB Procedures.

After asking around, you discover that the residents, nurse practitioners, and everyone else in your department would also like to see a pediatric-specific SnapShot and preference lists. Only pediatricians with the same scope of practice and job duties want the additional Chart Review tab.

	Change 1	Change 2	Change 3
What setting needs to change?	SnapShot Report	Chart Review Tabs	Outpatient Preference Lists
Which users need the change?	ALL CLINICAL USERS IN TRNCLN## PEDIATRICS	ANY USERS WITH SAME ACCESS TO CLINICAL TOOLS AS THE PEDIATRICIANS	ALL CLINICAL USERS IN TRNCLN## PEDIATRICS
What do the users who need the change have in common?	ORGANIZATION, SERVICE AREA, CLINIC LOCATION, LOGIN DEPARTMENT	ORGANIZATION, SERVICE AREA, CLINIC LOCATION, LOGIN DEPARTMENT, EPICCARE SECURITY CLASS	ORGANIZATION, SERVICE AREA, CLINIC LOCATION, LOGIN DEPARTMENT
What is the most general level of the hierarchy that could deliver each change?	DEPARTMENT	EPICCARE SECURITY CLASS PROFILE FOR PEDIATRICIANS	DEPARTMENT

After going over the table with your instructor, use the following diagram to map out a plan for making changes to the existing profile setup for your pediatricians.



Based on your scenario analysis, how many profile records will you edit to deliver the appropriate changes for your users?

TWO RECORDS: THE EPICCARE SECURITY CLASS-LEVEL PROFILE AND THE DEPARTMENT-LEVEL PROFILE

Exercise 2: Edit Profile Records

Edit EpicCare Security Class Profile

Because there is already a profile linked to your pediatricians' EpicCare security class, you will open that profile record and add the appropriate value to the Chart Review Tabs item.

When entering values, you can use either the name or the ID of the record you're searching for. In the exercise, you are given both pieces of information, but the system will only recognize one or the other.

1. Logged in to text as your builder, go to the Profile (LPR) master file:
   - **Clinical Administration > Management Options > Profiles**
2. Open your assigned TRNCLN## PEDS SECURITY CLASS PROFILE (984004##).
3. Select **Chart Review, Summary Report**.
4. Press **PAGE DOWN** until you get to the **Chart Review Tabs** screen.
5. In the **Chart Review Tabs** column, press **DOWN ARROW** to move your cursor to the second row.
6. Press **F7** to insert a row, and enter OB CHART REVIEW TAB - PROCEDURES (1020000001).
   - Tip: If you search by name, just enter part of the full name and press **TAB** or **ENTER**.)
7. Press **SHIFT+F7** until you have completely exited the record.

Edit Department Profile

All clinical users in your department want to see a pediatric SnapShot report and preference lists. To complete your build, you will edit the profile record linked to your pediatrics department.

1. Open your assigned TRNCLN## PEDIATRIC DEPARTMENT PROFILE (984003##).
2. Select **Chart Review, Summary Report**.
3. Page down to the **SnapShot** screen.
4. Press **F1** on your keyboard to delete the default report that's listed.

5. Enter the following report as the new default SnapShot report: TRNCLN## PEDIATRIC PATIENT SNAPSHOT (984008##)

```
ADMIN AMBULATORY                       EPIC                       Date: 12/19/16
EMC FAMILY MEDICINE                  Profiles                     Time:  3:31 PM

Profile Name                                                          Profile ID
TRNCLN99 PEDIATRIC DEPARTMENT PROFILE (Partial Profile)                 98400399
                                      SnapShot

  SnapShot default report...: 98400899-TRNCLN99 Pediatric Patient Snapshot
  SnapShot specialty reports:  1. _
```

6. Press **SHIFT+F7** one time to return to the profile menu.
7. Select **Procedure, Scheduling, Task**.
8. From the submenu, select **Preference List, Order Search**.
9. Page down to the **Outpatient Orders Preference Lists** screen.
10. Fill out the table to match the following screen shot:

```
                    Outpatient Orders Preference Lists

 The items on this screen affect both medication and procedure orders.

                    Outpatient Orders Preference Lists

 Type                   List                         Title
 1. Labs                1490000002-AMB PED LABS      Ped Labs
 2. Imaging             1490000001-AMB PED IMAGING   Ped Imaging
 3. Procedures          1490000003-AMB PED PROCEDU*  Ped Procedures
 4. Immunizations       1200-AMB IMMUNIZATIONS       Ped Immunizations
 5. Referrals           1490000005-AMB PED REFERRA*  Ped Referrals
 6. Supplies            1416-AMB SUPPLIES            Supplies
```

What type of preference list? (Choose from a list)

What is the actual preference list? (Link to a specfic list)

What title should users see in the Browse tab of the order look up window? (Write case sensitive free text)

11. Your build is complete! Press **SHIFT+F7** until you have exited the record.

Verify the New Settings

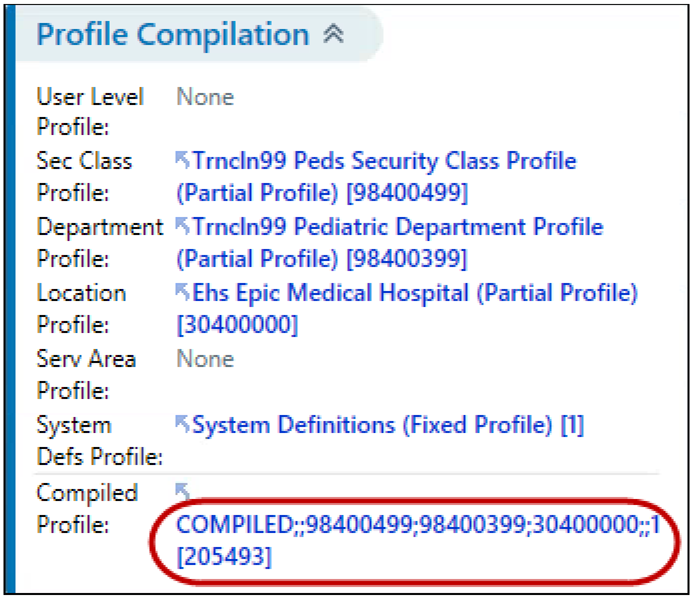
Pediatricians are being affected by these profiles. You want to be certain the correct changes went into effect for all users in your department.

1. Log out of Hyperspace and log back in as your Andy pediatrician.
2. Open Isaac's encounter from the schedule.
3. Go to **Chart Review**.
   - Do you see the OB Procedures tab you added?
4. Open **SnapShot** in Chart Review.
   - Do you see the Peds SnapShot report?
5. In the visit taskbar, open your preference list browser .
   - Do you see the preference lists you added? (Hint: check the Browse tab for the titles of Peds Lab, Peds Imaging, etc.)

Use Record Viewer to Verify Compiled Settings (If You Have Time)

In addition to viewing individual profile records, you can also view compiled profile records within Hyperspace. This is a quick and easy way to see a summary of the profile settings affecting a user. To do this, you must activate report assistance to access a link to the compiled profile.

1. Open **Session Information Report**.
2. In the report, click **Show Report and Print Group IDs** at the top left.
3. Click **OK**.
   - In the Profile Compilation section of the report, all of the profiles listed are now hyperlinks.
4. Click the link for your compiled profile.



- Clicking the link brings you directly to Record Viewer, with the compiled profile available for you to view.

5. **Jump To Item** 17991.
   - The item you jumped to is now at the top of the viewer.
   - This is the item for specifying the default SnaptShot report.
6. Use the table below to find some settings in the compiled profile and reflect on what level you defined these settings in the previous exercises.

Item to Search	Value Found	At what level of the hierarchy did you make this change in the exercise?
17991- SnapShot Default Report	TRNCLN## PEDIATRIC PATIENT SNAPSHOT	DEPARTMENT LEVEL
8105- Outpatient Preference Lists	MULTIPLE PED PREFERENCE LISTS	DEPARTMENT LEVEL
205- Chart Review Tabs	MULTIPLE CHART REVIEW TABS, INCLUDING OB TAB	EPICCARE SECURITY CLASS LEVEL

7. Back in **Session Information Report**, turn off Report assistance.
8. Log out of Hyperspace.

More about Profiles

This section is a brief overview of settings that can be configured in a profile.

You're not expected to know every possible setting that is configured in a profile record. For certification, be familiar with the settings discussed in this chapter.

Reports:

- Schedule reports
- Available reports in the Patient Lists, as well as the columns a user can select when creating a new My List
- Chart Review reports for each type of encounter and each type of order

Flowsheets: The default buttons and preference list items in the Flowsheets activity

Navigators: Which navigators you see when you log in to Hyperspace (these settings may be overridden by Workflow Engine rules)

Workflow Engine Rules:

- A Workflow Engine rule is a set of conditions that will change a patient workspace based on certain conditions.
- You will learn more about Workflow Engine rules in chapter 6.

Orders-related:

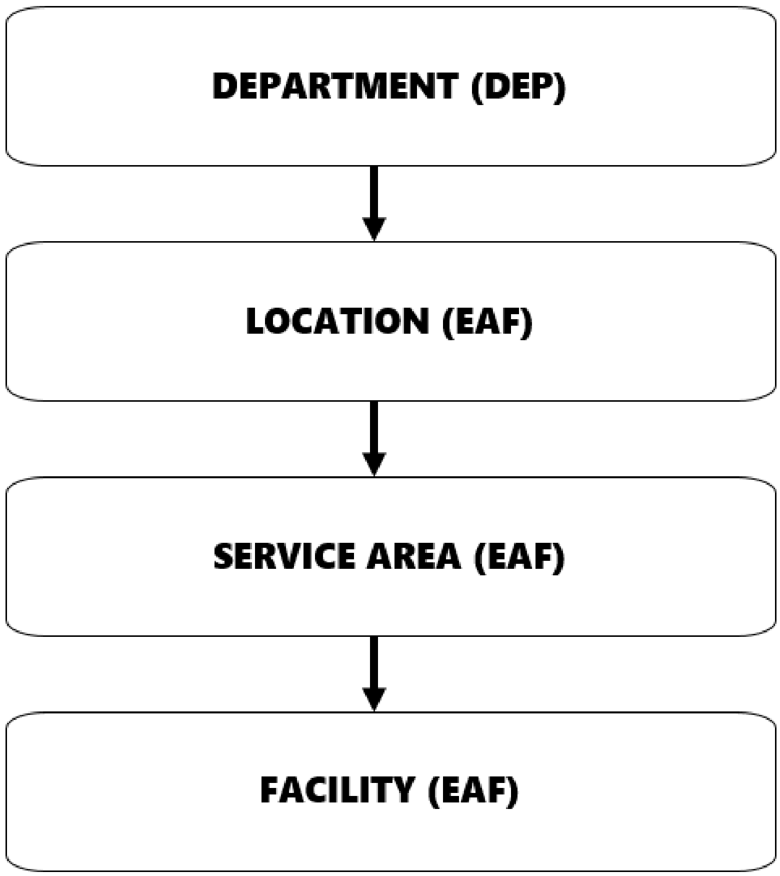
- Whether your orders are verbal orders by default
- Whether the system tries to have the ordering and/or authorizing provider appear by default when you place an order
- Which types of orders require diagnosis association
- What validation programming points are checked when you try to sign an order (to check for duplicates, make sure that an admitted patient has a hospital account, etc.)

Vitals: The units of measure used when displaying a patient's height or weight

Signing a visit: What information must be charted before an encounter can be closed

Facility Structure

As you saw in the profile hierarchy, the three levels that accommodate "where" all depend on the facility structure. Facility structure is a linked hierarchy of Chronicles records that represent all aspects of your enterprise: units/departments, hospitals, clinics, and business entities. The facility structure for the inpatient context also includes beds and rooms.



The facility structure forms the backbone of your administrative build. Without it, you would be unable to determine where patients are being seen, where users are working, and what settings should apply. Designing and building your facility structure is one of the first tasks in an implementation.

Many of the records in facility structure are stored in one master file: EAF. This master file contains records for a facility, service areas, revenue locations, and places of service. What differentiates one type of record from another depends on how you create the record and how you link it to the rest of your facility structure.

The Facility (Organization)

Epic uses the term facility to mean your entire enterprise or organization. There is always one-and only one-facility. Record #1 in the Facility (EAF) master file is automatically, and always, the facility record.

Some system-wide settings can be made in the facility record. Where appropriate, settings made in the facility record can be overridden at more specific levels of the facility structure hierarchy.

Service Area

Service areas represent the accounts receivable and/or business entities of your organization. This level in the hierarchy exists for the purposes of Epic's billing applications. If a patient could receive care from two places and still get a single bill, those two places would be part of the same service area.

Depending on the financial reporting needs of your organization, a service area might represent a geographical region, a previously independent organization that your organization has acquired, or simply your entire organization. The need for multiple service areas is determined by the billing or access management teams. Many customers have just one service area.

Revenue Locations

Revenue locations (more commonly called locations) represent entities that exist within each of your service areas.

Locations are typically physical buildings, freestanding clinics, and hospitals. Locations can also represent groups of departments.

Departments

The Department (DEP) master file contains records for the hospital units and departments. A department record exists for one of the following reasons:

- It's a place where patients receive care from healthcare providers. Patients are scheduled or admitted in such a department every time they have a clinical encounter.
- Often users have the ability to choose a department when they log in to Hyperspace after entering an ID and password. The login department controls a variety of settings, such as which department is displayed for your schedule and which reports are available.

Reviewing the Chapter

Review Questions

1. True or False: Any profile record can be linked at any level in the hierarchy.
   TRUE
2. Pharmacists, pharmacy techs, and pharmacy managers all work in the same department, but each have different security classes. The pharmacists and the pharmacy techs use the same Summary reports. The pharmacy managers need an additional set of reports. At which level of profile should you configure the Summary reports for each of these groups of users?
   BECAUSE THEY ALL SHARE A LOGIN DEPARTMENT, THE PHARMACISTS AND THE PHARMACY TECHS CAN GET THEIR REPORTS FROM A DEPARTMENT PROFILE. THE PHARMACY MANAGERS SHOULD GET THEIR REPORTS FROM AN EPICCARE SECURITY CLASS PROFILE.
3. How can you define the default report buttons that appear for a user in the SnapShot activity?
   LIST THE REPORTS THAT SHOULD BE DEFAULT BUTTONS IN THE STARTUP BUTTONS FIELD ON THE PATIENT SUMMARY SCREEN IN THE PROFILE.
4. True or False: The profile controls access to activities in Hyperspace.
   FALSE. THE PROFILE CONTROLS THE OPTIONS AVAILABLE WITHIN ACTIVITIES.
5. A user logs in and is affected by two profiles: a department level and a System Definitions level. When the two have competing values, which values override which?
   THE MORE SPECIFIC LEVEL PROFILE SETTINGS WILL OVERRIDE THE MORE GENERAL. THE DEPORT PROFILE'S VALUES WOULD TRUMP THE SYSTEM DEFINITIONS PROFILE'S VALUES.
6. What is the maximum number of profiles that can contribute to a compiled profile?
   SIX

Review Key

1. True or False: Any profile record can be linked at any level in the hierarchy.
   <u>TRUE</u>
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6. What is the maximum number of profiles that can contribute to a compiled profile?
   <u>SIX</u>

Study Checklist

Make sure you can define the following key terms:

- ☐ Profile
- ☐ Compiled profile
- ☐ Profile hierarchy

Make sure you can perform the following tasks:

- ☐ Identify which profiles make a user's compiled profile
- ☐ Identify which values a user's compiled profile contains

Make sure you fully understand and can explain the following concepts:

- ☐ How a profile affects Chart Review, reports, and preference lists
- ☐ How profiles interact with each other to create a compiled profile
- ☐ The basic principles of compiled profile configuration
- ☐ Determine where to build and link profiles based on knowledge of the profile hierarchy

Lesson 5: Navigators: Guide Clinicians through a Workflow

Navigators: Guide Clinicians through a Workflow

Navigators: Guide Clinicians through a Workflow

Taking care of patients is a complex task, involving a variety of healthcare roles, specialties, and encounter types. The information a pediatric medical assistant reviews during a telephone encounter is very different from what a physician specializing in general surgery might record while making rounds in a hospital. How can administrators configure Epic's electronic medical record to fit different job roles or specialty workflows?

The answer: navigators.

Navigators are designed to organize a workflow in a logical format. For example, a medical assistant rooming patients in a clinic needs to enter a chief complaint, vitals, and perhaps a short note. A physician rounding on a patient in the hospital wants to review the previous day's information, then modify, discontinue, or place new orders, and write a note.

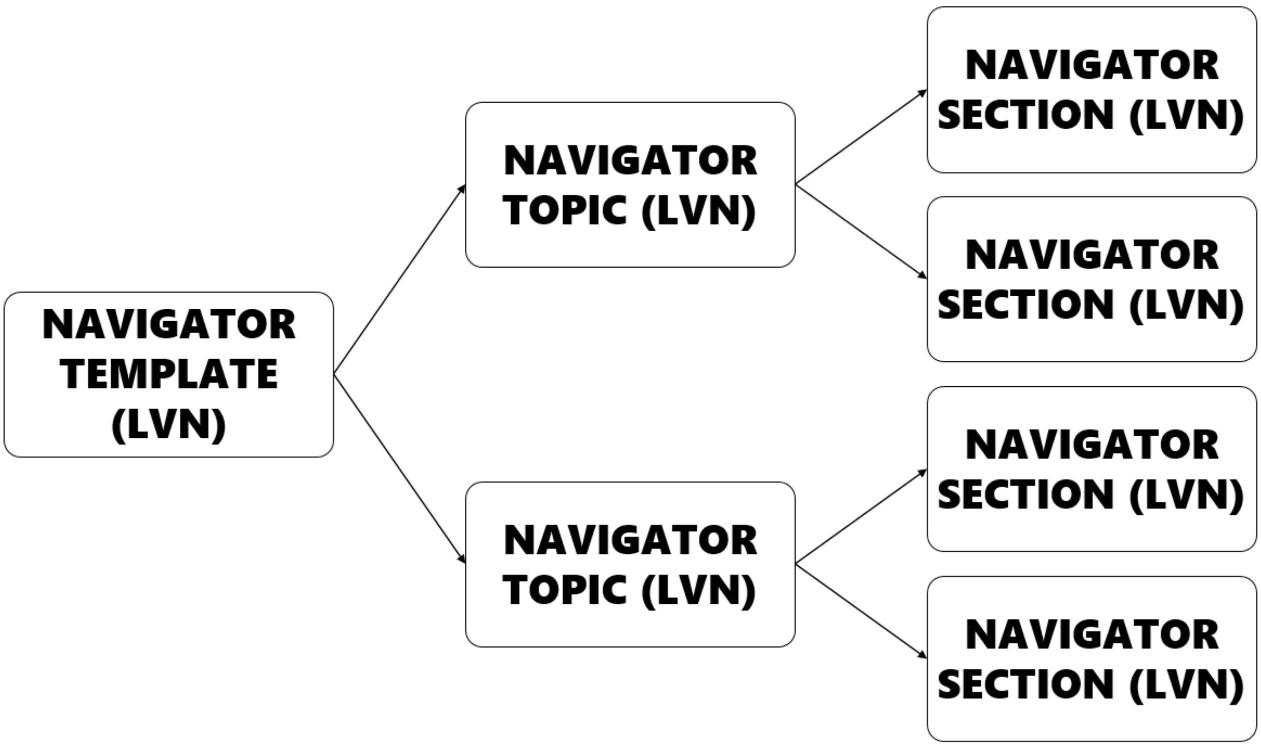
This chapter introduces the basic setup of navigators.

> Navigators are also called navigator templates or charting templates.

The Big Picture

Users see navigators because they're assigned either directly in profile records or via Workflow Engine rules. The goal is for end users to see the navigator that is best suited for their workflow.

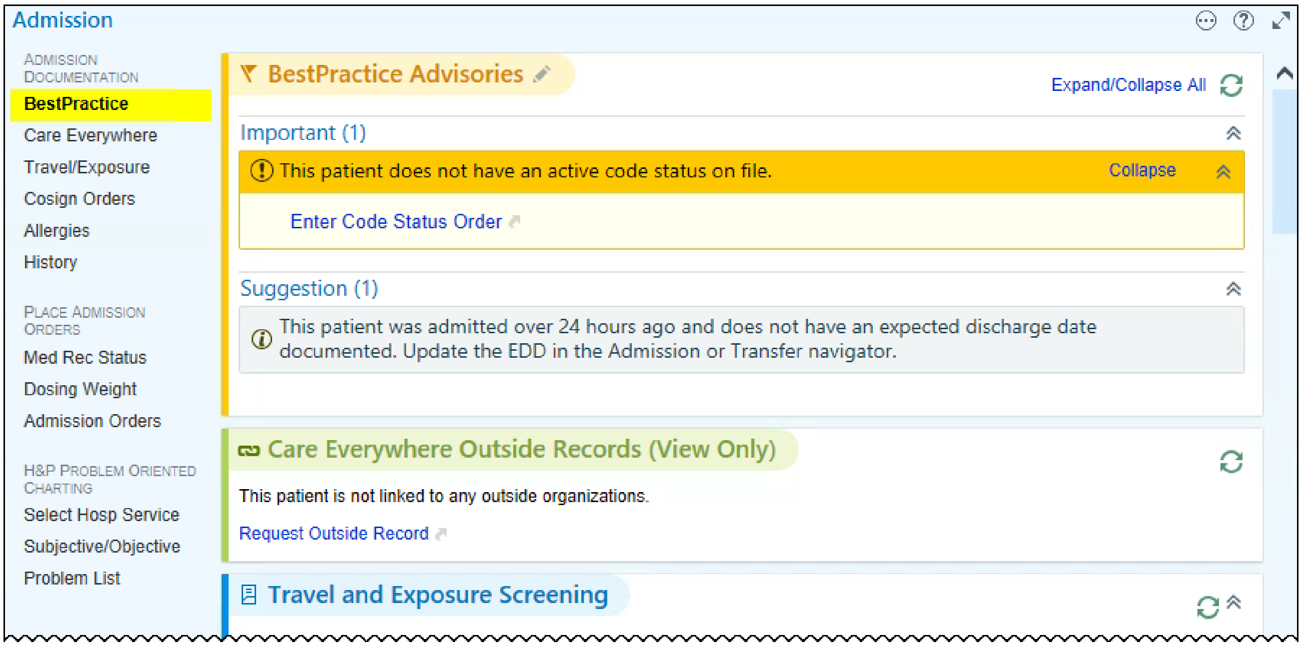
Each navigator is composed of three types of records: *templates*, *topics*, and *sections*. All of these types of records are part of the LVN master file.



Navigator Structure

Take a look at some navigators and explore navigator structure and terminology.

1. Log in to Hyperspace as your Andy pediatrician.
2. From the **Patient Lists** activity, open your Bobby patient's chart.
3. In Bobby's chart, click the **Admission** activity tab.



Admission navigator for Bobby

How many topics are in this template? What are their captions?

<u>THREE. ADMISSION DOCUMENTATION, PLACE ADMISSION ORDERS, AND H&P PROBLEM ORIENTED CHARTING.</u>

How many sections are in this template?

<u>12</u>

How many navigator records total make up this navigator?

<u>16 (ONE TEMPLATE, THREE TOPICS, 12 SECTIONS)</u>

Build a Navigator

Questions to ask when building a navigator:

1. When do clinicians need this navigator?
   - Ask: Is it only for certain encounter types? Is it only for when the patient is a woman? Is it only for when the patient is a child?
2. How do I make this navigator apply in those situations?
   - A Workflow Engine rule, which you will learn about in the next chapter, changes details of a workspace based on context and can make your new navigator appear based on when clinicians need to use it.
3. What workflows do clinicians have in those situations?
   - Ask: What part of the patient's chart do they need to go into and in what order do they need to complete their workflow?
4. Is there an existing navigator template to meet those workflow needs?
   - If an existing navigator template meets you need, you can specify it in the Workflow Engine rule, covered in the next chapter. If there is one that is close to what you need, you can duplicate it and modify the copy. Your last option is to build an entirely new navigator.
5. What topics does the template need?
   - Ask: Do the topic already exist? Do I need to build any new ones?
6. If I need to build a topic, what sections does it need?
   - In the Navigator Editor, you can search for section using key words (the search tool is EnROL-enabled). If you aren't sure what a section does based on name alone, investigate the application Setup and Support guides on Galaxy. If you need to build a new section, your Epic representative can help.

! Some sections only work for certain types of encounters. For example, sections with a prefix of SEC_IP are designed for EpicCare Inpatient and will not work in outpatient encounters.

Create a New Navigator

For the most part, your pediatricians like the navigator that shows up when they see pediatric patients in the hospital. However, they would like to see some changes.

When your pediatricians begin rounding with pediatric patients, they want to see immunization history for those patients; they also want to quickly view and document any head to toe assessment and update demographic information. After that, they follow a workflow similar to what they would do with older patients.

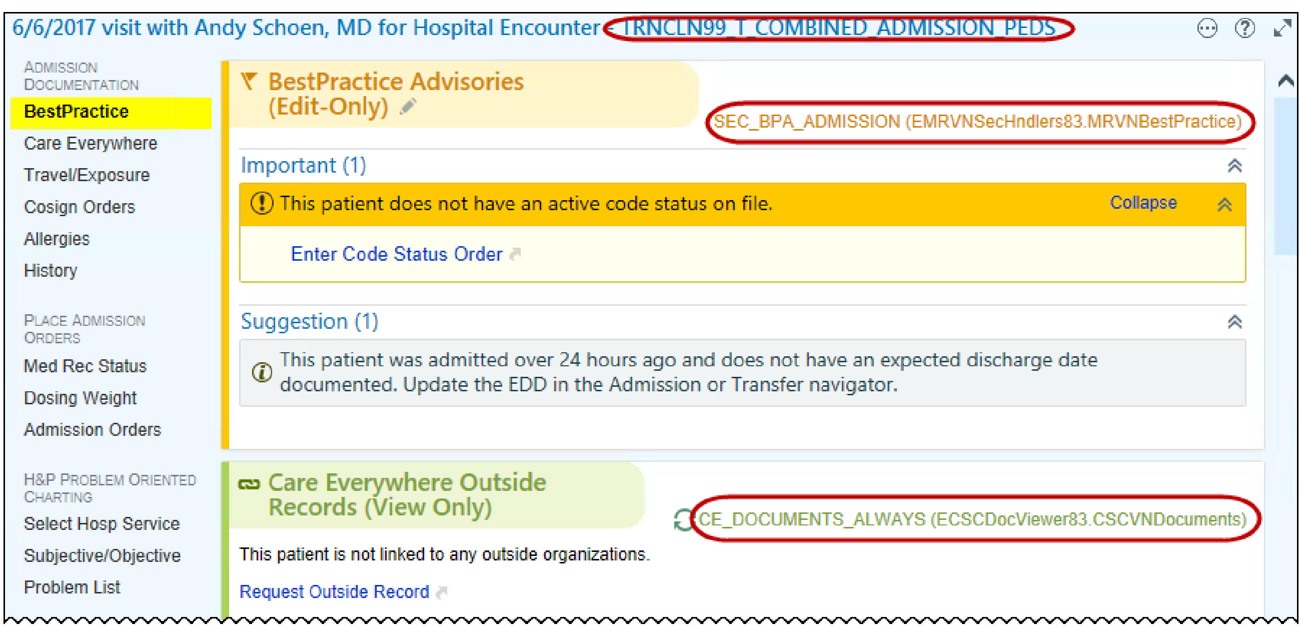
Your pediatricians need the three basic topics they currently have in the Admission navigator. You will also create a new Well Child topic. This new topic will consist of three sections: immunization history, a link to head to toe assessments and easy access to demographic information.

Identify Record Names

Because the navigator that is currently impacting your pediatricians is close to what they want, you will start by identifying the name of the navigator template. Then, you will duplicate it in text.

Users see captions and abbreviations, not record names. However, an administrator may want to reuse sections from another navigator, or duplicate an existing template to more efficiently build a new one. To do so, they need to know the names of the template or section records.

1. To see navigator record names, hold down **CTRL+ALT+SHIFT** with your left hand. With your right hand, press and release **F12**, and then press and release **F10**.



The navigator template's record name appears at the top. The sections' record names appear to the right of each section heading within the navigator.

Write down your navigator template record:

Navigator Record Name
IDS WILL VARY

Because all three types of navigator records are part of the same master file (LVN), a naming convention allows administrators to glance at a record name and know what type of record it is. The following prefixes are used:

- T for template
- TOPIC for topic
- SEC for section

Duplicate a Navigator Template

1. Log in to text as a builder.
2. Go to **Clinical Administration > Navigators > Dup Navigator.**
3. At the **VN Record** prompt, enter the name of the navigator record you want to duplicate (TRNCLN##_T_COMBINED_ADMISSION_PEDS).
   - Note: You can use spaces instead of underscores when entering the name of the record.
4. Enter an asterisk (*) to have the system assign an ID number for your duplicate.
5. **Do you want to give the duplicate record a new name?** Type "yes".
6. Name your new navigator template: <your initials>_T_IP_MD_PEDS_ADM.
7. At the **Continue?** prompt, type "yes".
   - After the duplication is complete, you are brought back to the **New Record ID (.1)** prompt.

Edit a Navigator

Now you have a new copy of the pediatric admission navigator template. You will continue editing this record in Hyperspace.

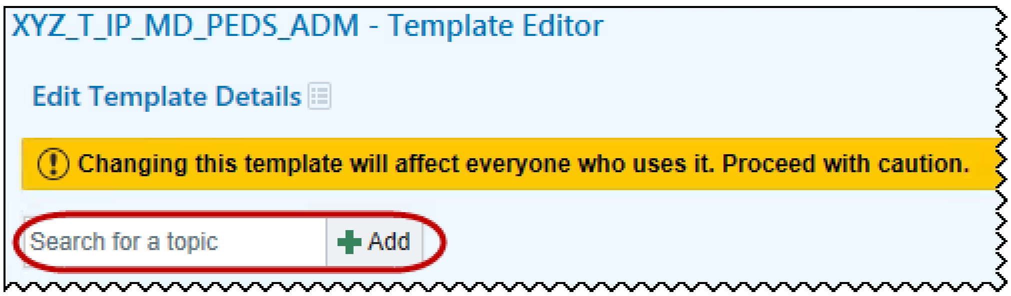
1. Log in to Hyperspace as your builder.
2. From the dashboard, click **Navigator Template Editor (LVN)**.

- Tip: Can't find what you're looking for on the dashboard? Use **CTRL+SPACE** to open Chart Search and search for what you are looking for (in this case, search "navigator template").

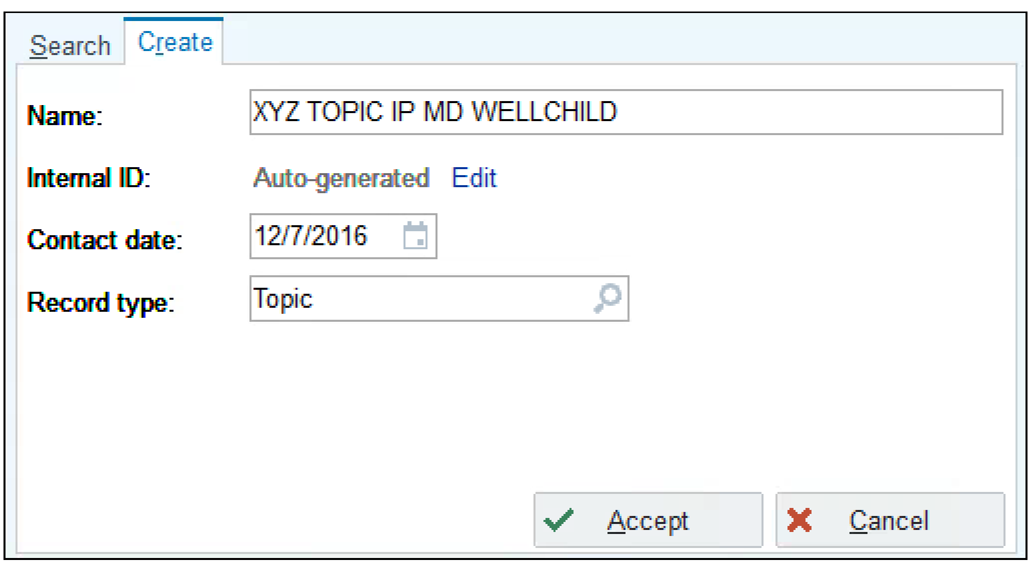
3. Open <your initials>_T_IP_MD_PEDS_ADM navigator.

Add Topics to a Template

In the Navigator Template Editor, you can add a topic to a template by typing in the search field at the top of the template or click the **Add** button. You can also create topic records on-the-fly by either of these means.



1. Click **Add**. On the **Create** tab, enter the following:
   - **Name**: <your initials> TOPIC IP MD WELLCHILD
   - **Record type**: Topic

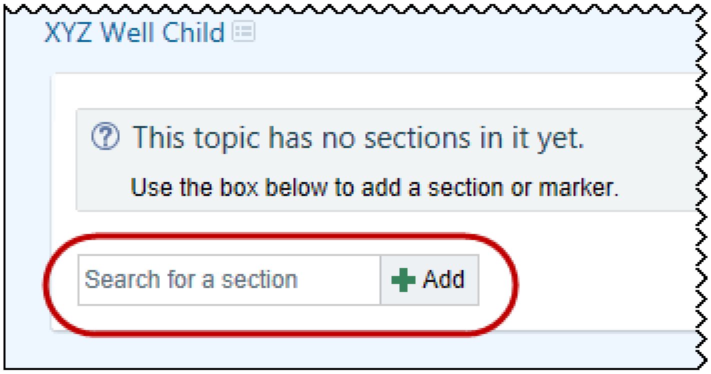


2. Click **Accept**.
   - A new item window appears at the top of the editor.
3. The caption determines the display name for this topic in Hyperspace.
4. **Caption**: <your initials> Well Child
5. Click **Accept** in the topic.

- The new topic is now at the end of the template.

Add Existing Sections to a Topic

Add a section by typing in the "Search for a section" field at the bottom of the appropriate topic, or click the **Add** button.



When searching for sections keep in mind:

- You don't need to include the underscores in the name. Spaces suffice.
- Letter case doesn't matter.
- You can leave out the prefix.
- You can search by ID number.

1. Add the following sections to your Well Child topic:
   - SEC_IMM_HIST_RPT (156)
   - SEC_MODEL_IP_PEDS_ASSESSMENT_LINK (3043430105)
   - SEC_IP_DEMOG_GENERAL_LINK (34303)
2. Your navigator build is complete. Click **Accept** to save and close the Template Editor.

You have finished the build for your new navigator template. If you open Bobby's admission encounter, will you be able to see the changes you made? Why or why not?

NO; WE HAVEN'T LINKED THIS NEW NAVIGATOR ANYWHERE TO AFFECT OUR PEDIATRICIANS.

We will test this navigator build in the next chapter after learning about Workflow Engine rules and finishing our build.

Reviewing the Chapter

Review Questions

1. True or False: To create a navigator, you work in the following master files: Section, Topic, and Template.
   FALSE. ALL THREE OF THESE ARE DIFFERENT TYPES OF RECORDS IN ONE MASTER FILE, LVN.
2. Fill in the blank: A navigator topic record holds navigator __________ records.
   SECTION
3. True or False: A navigator template record can be linked to more than one topic record.
   TRUE
4. If you type a caption of 'Charting' into a navigator topic record, who will see that in Hyperspace, and in what place will they see it?
   IT IS WHAT THE END USER SEES AS THE DISPLAY TEXT IN THE TABLE OF CONTENTS FOR THE NAVIGATOR

Review Key

1. True or False: To create a navigator, you work in the following master files: Section, Topic, and Template.
   FALSE. ALL THREE OF THESE ARE DIFFERENT TYPES OF RECORDS IN ONE MASTER FILE, LVN.
2. Fill in the blank: A navigator topic record holds navigator __________ records.
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   IT IS WHAT THE END USER SEES AS THE DISPLAY TEXT IN THE TABLE OF CONTENTS FOR THE NAVIGATOR

Study Checklist

Make sure you can define the following key terms:

- ☐ Section record
- ☐ Topic record
- ☐ Template record

Make sure you can perform the following tasks:

- ☐ Build a navigator topic
- ☐ Build a navigator template

Make sure you fully understand and can explain the following concepts:

- ☐ Relationship between navigator sections, topics, and templates
- ☐ How navigators are assigned with Workflow Engine Rules

Lesson 6: Workflow Engine Rules: Dynamically Change Details of a Patient Workspace

Workflow Engine Rules: Dynamically Change Details of a Patient Workspace

Introduction

In the previous chapter, you learned about navigator templates. Ideally, the system should evaluate the situation for a particular patient encounter and determine which navigator templates to show. That's the purpose of a Workflow Engine rule record. Epic releases properties that you can use alone or in a combination to define criteria to make particular activities or navigators available.

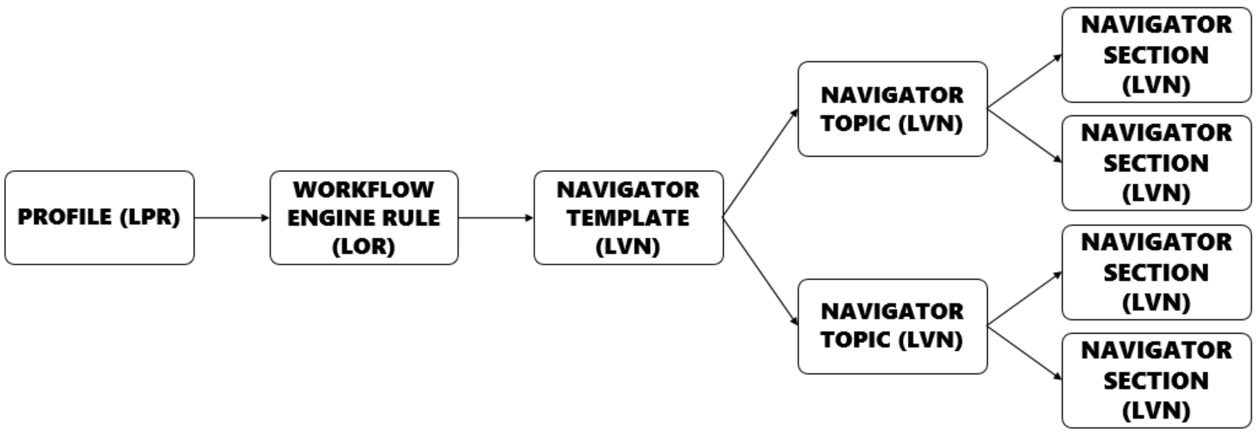
To decide which Workflow Engine rule record to consult, the system looks to a user's profile hierarchy and then evaluates the Workflow Engine rule record linked in the most specific profile in the hierarchy. Ultimately, a profile controls which navigators appear via the link to a Workflow Engine rule record.

In this chapter, you will explore how a Workflow Engine rule record is composed and evaluated. This chapter also contains information on editing and testing a Workflow Engine rule.

The Big Picture

This chapter focuses on how Workflow Engine (WE) rules impact the configuration of the clinical workspace a user sees in Hyperspace. WE rules are linked to profile records.

Each time an end user opens an encounter, the system looks for the WE rule defined in the user's compiled profile. If the context of the encounter matches the criteria of the WE rule, specific details and options will appear in the patient workspace.



What Does the Workflow Engine Do?

A Workflow Engine rule is a record in the LOR master file that allows the patient workspace to be altered based on context. This is of particular value when working within a specialty, such as labor and delivery, or when there are exceptional patient considerations, such as caring for a pediatric patient. The Workflow Engine is configured to control four patient workspace settings:

- Activity tabs (to the left of the patient chart)
- More menu (formerly known as the More Activities or Action menu)
- Navigators
- Sidebars (when using widescreen view)

Menus, including activity tabs and the More menu, can be configured via role records that are linked in user records (you will learn about role records in a later chapter). Similarly, it's possible to assign navigators directly in a profile record. The Workflow Engine rule was created to override those more generic settings when needed.

A profile record can link to a Workflow Engine rule record, and like any other item, the most specific level in a user's profile hierarchy is the one that will be respected.

In any given workspace, only one Workflow Engine rule will be consulted and used. Regardless of whether or not the patient encounter matches the conditions in that rule, the system does not look any further in the hierarchy for other Workflow Engine rules.

Observe Workflow Engine Rules in Action

In this section, you will observe how navigator and activity tab setup can be different based on clinical context.

1. Log in to Hyperspace as your Andy pediatrician.
2. From **Patient Lists**, open Bobby's admission encounter.
3. Your instructor will open Richard's appointment from the schedule.
4. In the table below, note the differences in each patient's workspace.

	Richard	Bobby
Activity Tabs	ROOMING PLAN WRAP-UP	SUMMARY ORDERS NOTES
More Menu	ADDITIONAL TOOLS SUBMENU	ACQUIRE/IMPORT SCANS CALCULATOR INTAKE/OUTPUT SEPSIS
Navigator	ROOMING PLAN WRAP-UP	ADMISSION TRANSFER DISCHARGE
Sidebar	THIS VISIT NOTES VISIT CHECKLIST	SUMMARY

Why do you think these settings are different?
THE SYSTEM IS CONSIDERING THE ENCOUNTER TYPE.

Rule Terminology and Basic Concepts

Each WE rule is composed of a set of *conditions* ("if" statements) and *directives* ("then" statements). The conditions evaluate properties about the user, the patient, or the type of encounter (admission, office visit, etc.). After matching on conditions, the directives then arrange the patient workspace.

Property= Relevant Information

Every clinical workspace has many properties, such as encounter type, patient age, and specialty.

Each property used in the Workflow Engine is defined by a property record in the Properties (LRC) master file. Epic programmers build these records.

What properties can the Workflow Engine evaluate? The following table lists some available properties. More properties are added with each new release of Epic software.

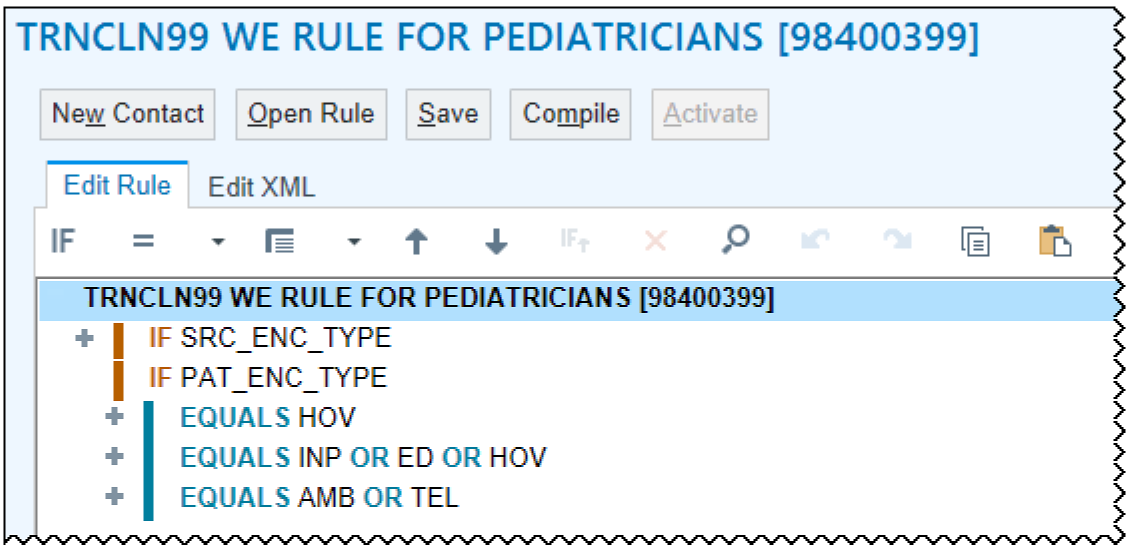
A full list of properties is listed in the *User Workspace Setup and Support Guide* on Galaxy.

Patient	• Patient Encounter Department • Patient Encounter Type (e.g. INP, HOV, ED, AMB) • Patient Sex • Patient Age (years) • OB/GYN Status • Patient Class
Department	• Source Encounter Department Specialty • Login Department Specialty
Provider	• Login Provider's Specialty • Login Provider's Provider Type
Appointment	• Appointment Visit Type • Is Appt. Scheduled from an Order?
Status of Care	• Case Progress Status (pre-op, intra-op, post-op, etc.)

Condition= "If..." Statement

The "If..." portion of a rule (condition) specifies which properties and values the "then..." portion applies to. The rows that start with "if" evaluate properties. Possible values are indented in the rows below.

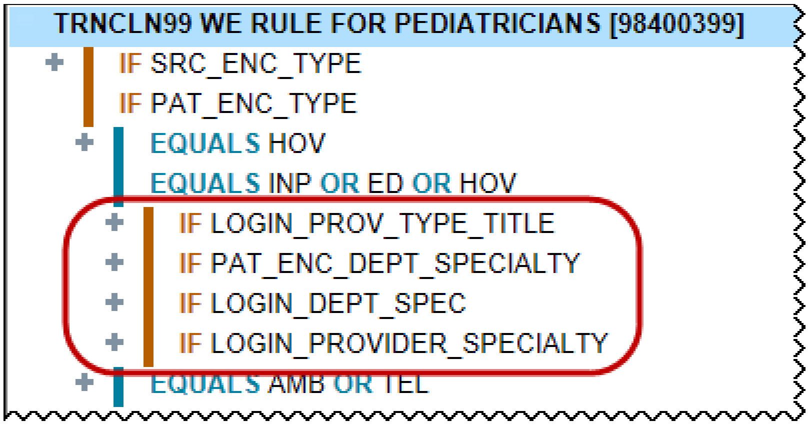
In the following example, the second condition states, "if patient encounter type is Hospital Outpatient Visit, then...". If there is not a match on that line the system moves down to the next node and evaluates "if patient encounter type is Inpatient or Emergency Department or Hospital Outpatient Visit, then..."



In this example, the first condition (the first row starting with "if") evaluates one property: SRC_ENC_TYPE (source encounter type).

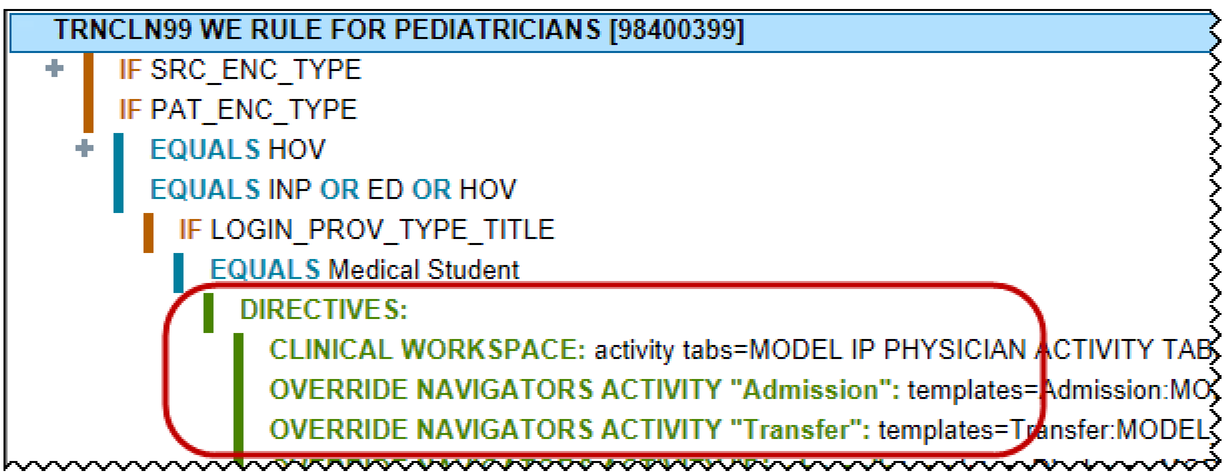
Nested Conditions

In the following example, the node next to the INP or ED or HOV value has been expanded, revealing additional conditions, each specifying another property to evaluate. These nested conditions allow for a more refined search.



Directive= "Then..." Statement

The "then..." portion of the rule (directives) tells the Workflow Engine what to do if the rule matches the conditions specified in the "If..." portion.

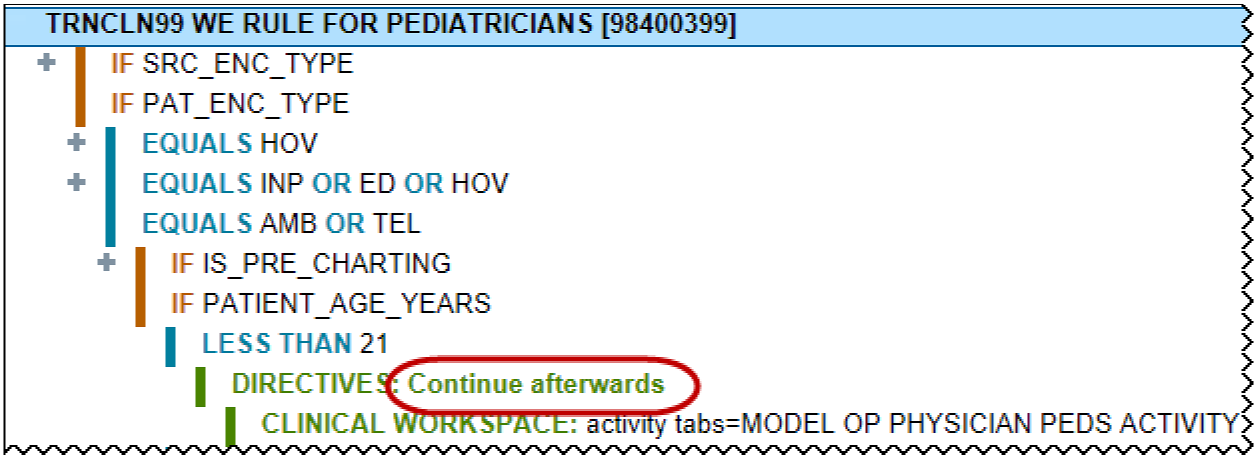


In this example, the system has evaluated two conditions. If both conditions are matched, the directive specifies a set of activity tabs to be displayed in the clinical workspace.

Directive: Continue Afterwards

Normally, when a rule matches on a true condition, it executes the directive(s) and then stops processing the rule. It's done searching. However, if a set of directives says "continue afterwards," then the system will continue reading the rule and processing conditions and directives.

Directives found later in the rule can add to previous directives. If later directives found by continuing afterwards conflict with previous directives, the later directives will override the previous.


TRNCLN99 WE RULE FOR PEDIATRICIANS [98400399]
IF SRC_ENC_TYPE
IF PAT_ENC_TYPE
EQUALS HOV
EQUALS INP OR ED OR HOV
EQUALS AMB OR TEL
IF IS_PRE_CHARTING
IF PATIENT_AGE_YEARS
LESS THAN 21
DIRECTIVES: Continue afterwards
CLINICAL WORKSPACE: activity tabs=MODEL OP PHYSICIAN PEDS ACTIVITY

Explore a Workflow Engine Rule

Before you edit a rule, there are a few intermediate steps you should take to make sure the changes are necessary.

When your pediatricians see patients in the hospital, they would like to review their information in the Admission navigator you built in the last chapter.

Observe an Active Rule

You will see if the correct navigators are displaying for Andy when he sees younger patients in the hospital.

1. In Bobby's chart, look at the Admission navigator.
   - It doesn't have the changes you made in the last chapter. This isn't what your pediatricians want.

Determine the Rule Affecting a User

Before you can fix a problem in a rule, you must figure out which Workflow Engine rule is affecting your users.

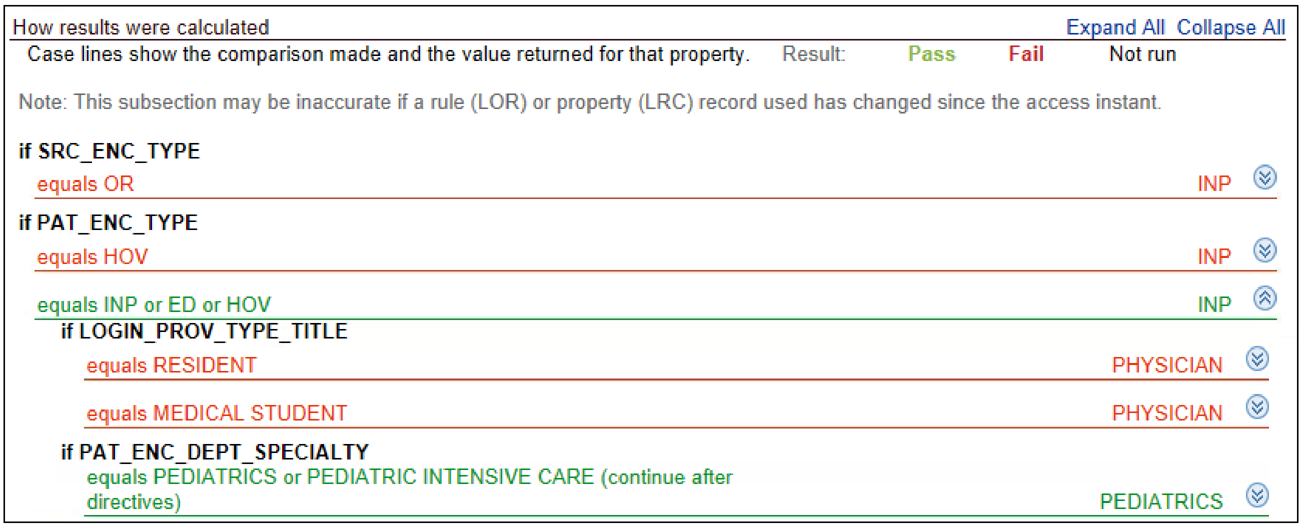
The report referenced in these steps uses the Epic-released print group: Workflow Engine Rule Explanation (53622).

Alternatively you can access this information by going to the Session Information Report and clicking the hyperlink for the Workflow Engine Rule Explanation under Patient Encounter Workspaces.

1. In the sidebar, select the Rule Log Viewer report.
   - This report shows what WE rule was used.
   - Write the name of the rule listed at the top of the report. You will need it later.

Workflow Engine Rule Record Name
PLACEHOLDER FOR TRAINEE RECORD NAME

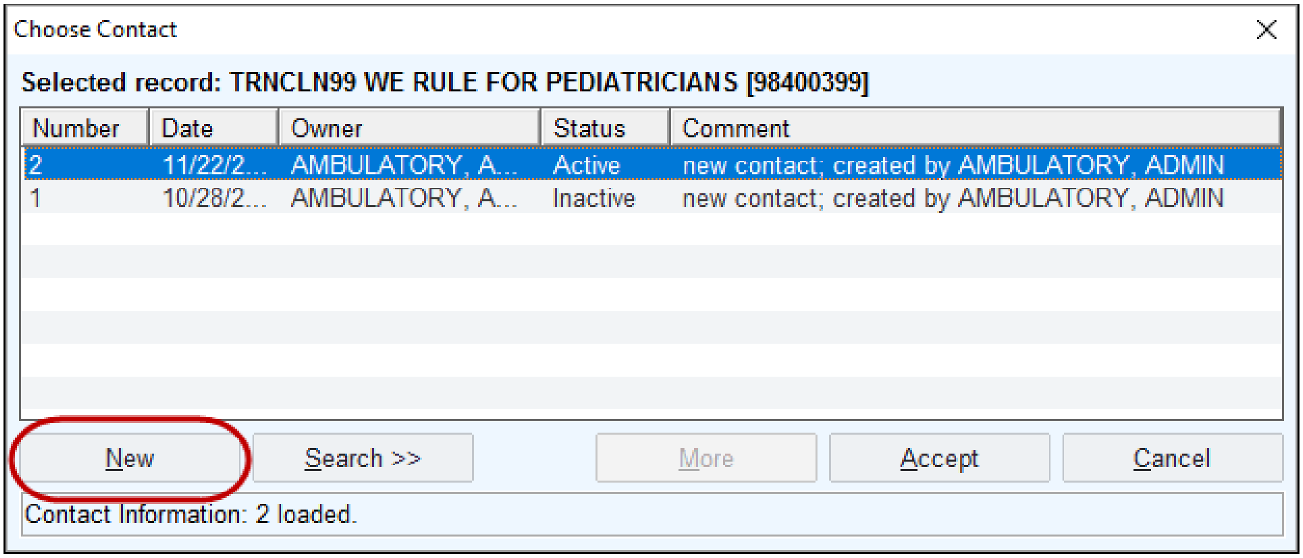
2. In the report, find the **Navigators** heading. Click the chevron to its right.
    - This shows which navigator templates have been assigned.
3. Find the **How results were calculated** heading. Browse its sections.
    - This shows how the system worked through the logic of the Workflow Engine rule and how it matched on various conditions.



Open a New Rule Contact

You will be making changes to a rule, but you don't want those changes to go into effect immediately. You'll modify your rule in a new inactive contact.

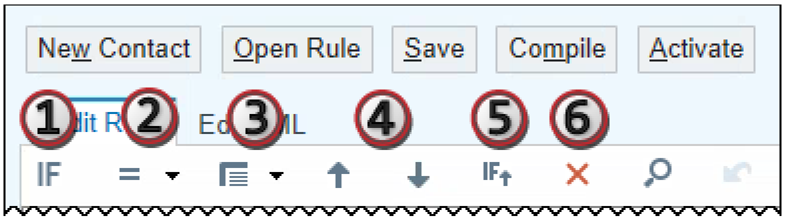
1. Log out and log back in as your builder.
2. On the dashboard, click **Workflow Engine Rules (LOR).**
3. Enter the name of the rule currently affecting your Andy pediatrician. (See the rule you wrote on the previous page.)
4. Click **New** to create a new contact. You should open a new contact in order to make changes to the rule currently affecting your pediatricians.



5. Accept today's date as the contact date.
6. Enter a contact comment: modify pediatric navigators.
7. Make sure that you are not in an active contact.
   - If you are in an active contact, click **New Contact** to create a new, inactive contact.

Find Appropriate Tools

The Edit Rules tab is where you do most of your work when building a rule. Here, you'll use toolbar buttons to create rows of information, called nodes. Depending on the kind of node you create, different active fields appear at the bottom of the Editor for you to fill in.



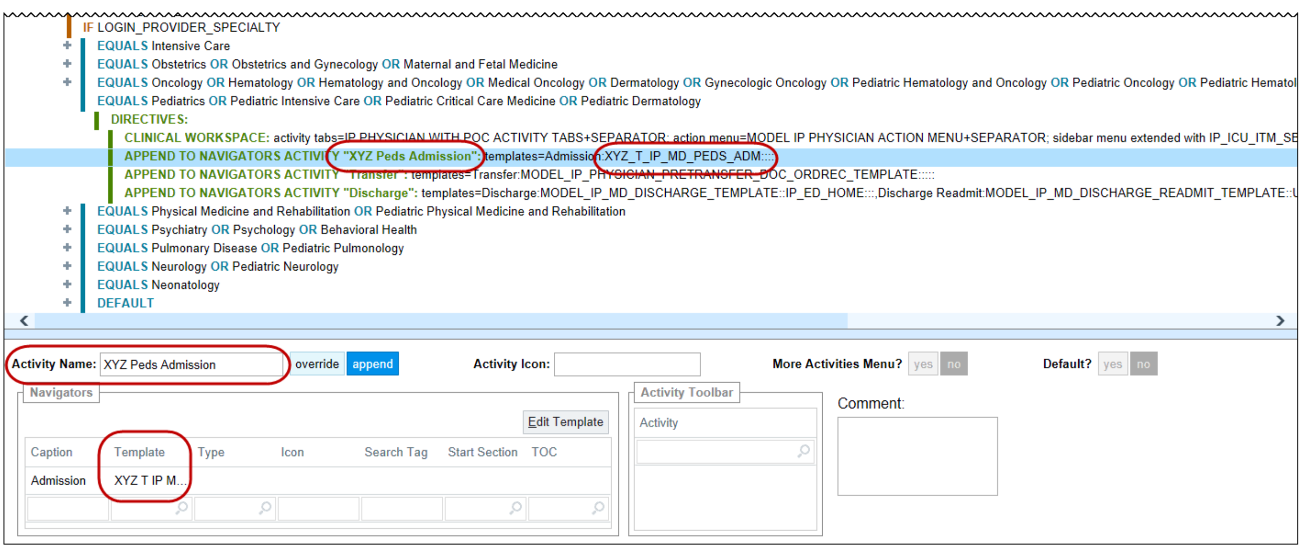
1) IF Add Condition	Click Add Condition to add a conditional "if" element to your rule. Conditions use property (LRC) records to form the beginning of a rule.
2) = Add Case	To choose "equals," click the button. To choose any other operator (like "does not equal"), click the expansion arrow and choose from the menu.
3) Directive: Set Toolset	Click Set Toolset Property to specify the properties of the workspace that opens when the condition and case values are met. Click the arrow button next to the hammer to select Add Navigators.
4) Move node up/down	Use these buttons to rearrange the layout of your nodes. Nodes can only move within their node type (for example, directives cannot move up past a condition).
5) Add Condition Above	Click Add Condition Above to add a conditional "if" element to your rule above the node you have selected. Conditions use property (LRC) records to form the beginning of a rule.
6) X Delete	Click Delete to delete and remove a selected node from the rule outline. All child nodes beneath a deleted node are also deleted and removed. For example, if you delete a condition row, then its directives are also deleted.

Edit a Workflow Engine Rule

Exercise 1: Make Changes to a Rule

In the last chapter, you created a new admission navigator for your pediatricians. For your build to affect your pediatricians you need to replace the old template in their Workflow Engine rule with the new one.

1. Expand the nodes next to the following properties and values, in this order:
   - **IF PAT_ENC_TYPE**
   - **EQUALS INP or ED or HOV**
   - **IF LOGIN_PROVIDER_SPECIALTY**
   - **EQUALS Pediatrics or Pediatric Intensive Care or Pediatric Critical Care Medicine or Pediatric Dermatology**
2. Select the line that reads "APPEND TO NAVIGATORS ACTIVITY 'Admission'..."
3. At the bottom of your workspace, in the **Activity Name** field, enter "<your initials> Peds Admission".
4. In the **Template** field, replace the first line with "<your initials>_T_IP_MD_PEDS_ADM".
   - You might receive a warning about Non-Tested Navigators. In the real world, you would test the listed navigator sections before moving on. For training purposes, click **Yes** to move on and use your navigator.



5. Before you test your new navigator, you need to activate your rule:
   - Click **Compile**.
   - Click **Activate**.

6. Once you see the green **Active** rectangle, close the workspace.

Test Your Work

Examine how the new navigator looks for your pediatricians.

1. Log in to Hyperspace as your Andy pediatrician.
2. Open Bobby's chart from **Patient Lists**.
   - You should see your new Admission navigator which includes the Well Child topic you created.
   - If you don't see what you expect, work with your instructor to check your build.

More about Workflow Engine Rules

Duplicate Workflow Engine Rules

You rarely need to build a Workflow Engine rule from scratch. More often, you would duplicate a rule and make changes to it.

While the functionality for duplicating Workflow Engine rules exists in Chronicles (the process is similar to duplicating a security class), the easiest and safest way is in Hyperspace. You can copy the raw XML code from the rule you wish to duplicate and paste it into a new rule.

1. Open the rule you wish to copy.
   - **Administrator Dashboard > Integrated Tools section > Workflow Engine Rules (LOR)**
2. Click the Edit XML tab.
3. Press **Ctrl+A** to highlight the entire code.
4. In the XML editor, right-click and click **Copy**.
5. Click **Open Rule** in the upper left corner of the editor.
6. On the Create tab, enter the name of the new rule and click **Accept**.
7. Click the Edit XML tab.
8. Press **Ctrl+A** to highlight the two lines of code that appear by default.
9. Press **Delete**.
10. In the XML window, right click and click **Paste**.

You can also copy and paste lines from the Edit Rules tab of the Workflow Engine Rule. You can then paste part of one rule into another one.

Additional Information

A Workflow Engine rule can point to other appropriate Workflow Engine rules using the GoTo directive. This directive allows multiple Workflow Engine rules to point to the same set of conditions and directives. Using the GoTo directive can make maintaining these rules, which can be lengthy, a bit easier for builders.

Active Versus Inactive Rule Record Contacts

If you have EpicCare Security point 222-**Workflow Engine Rule Editor Access Active Contacts**, you can make edits in active (released) contacts of a rule record. This security point is only enabled in test environments. If you don't have this security point, the Edit Rules and Edit Raw XML tabs are only available if you are working in an inactive (unreleased) contact of a rule record.

XML rule records can be "over time" records. This means you can modify a released rule record by simply creating a new contact for the rule. How is this useful?

- Maintaining contacts of a rule allows you to track how the rule changes over time.
- Multiple contacts allow you to create and edit new, unreleased contacts for released rules without affecting users until you are ready to release (activate) the new contact.

When you create a new rule record, the first contact is automatically inactive. Any new contacts created for that rule are also automatically made inactive.

After making changes in a new inactive contact, you must activate it to make your changes available. You can activate the contact you are editing by clicking **Activate** on the Workflow Engine Rule Editor toolbar. Only one contact in a rule can be active at a time. Activating a contact automatically deactivates the previous contact that was active.

Generic Visit Navigators in a Profile

Before Workflow Engine rules, visit navigators were set up in a table in profile records. That table was limited to basing navigators on contact type. While using a Workflow Engine rule is now the primary method for setting up Visit Navigators, the profile linked to System Definitions still contains a table of generic navigators to be used in situations when rules don't offer anything more specific. You can think of it as a safety net.

Looking for more helpful tidbits? You can find more information in the *Navigator, Activity, and Menu Setup and Support Guide*. Just go to Galaxy and search for "workflow engine rule."

Reviewing the Chapter

Review Questions

1. In which record do you link a Workflow Engine rule?
    a. Report
    b. Profile
    c. Navigator
    d. Print Group

B. PROFILE

2. How does the system know which Workflow Engine rule to use?

THE WORKFLOW ENGINE RULE LINKED TO THE MOST SPECIFIC LEVEL IN THE PROFILE HIERARCHY IS THE RULE THAT WILL BE CONSULTED.

3. What are three aspects of a patient encounter that can be altered based on a rule match?

ANSWERS WILL VARY. SOME INCLUDE: OVERRIDE OR APPEND MORE ACTIVITIES MENU, CHANGE DEFAULT ACTIVITY WHEN A WORKSPACE OPENS, CHANGE AVAILABLE NAVIGATORS.

4. True or False. If the patient encounter does not match conditions in a Workflow Engine rule, the system looks for a rule in the next level of the profile hierarchy.

FALSE. SETTINGS FOUND IN THE ROLE AND COMPILED PROFILE FOR THE PATIENT ENCOUNTER WILL BE USED. THE SYSTEM WILL NOT LOOK FOR ADDITIONAL WORKFLOW ENGINE RULES AT OTHER LEVELS IN THE PROFILE HIERARCHY.

5. True or False. Once a rule matches on conditions and carries out directives, the system always keeps looking for more conditions to evaluate.

FALSE. THE SYSTEM WILL ONLY CONTINUE EVALUATING THE RULE IF THE FIRST SET OF DIRECTIVES SPECIFIES "CONTINUE AFTERWARDS".

Review Key

1. In which record do you link a Workflow Engine rule?
    a. Report
    b. Profile
    c. Navigator
    d. Print Group

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FALSE. THE SYSTEM WILL ONLY CONTINUE EVALUATING THE RULE IF THE FIRST SET OF DIRECTIVES SPECIFIES "CONTINUE AFTERWARDS".

Study Checklist

Make sure you can define the following key terms:

- ☐ Workflow Engine
- ☐ Directive
- ☐ Conditions
- ☐ Property
- ☐ Rule hierarchy
- ☐ Workflow Engine Rule Editor
- ☐ Active rule contact

Make sure you can perform the following tasks:

- ☐ Read a Workflow Engine Rule
- ☐ Determine which directives in a rule will be carried out
- ☐ Edit a rule in the Workflow Engine Rule Editor

Make sure you fully understand and can explain the following concepts:

- ☐ The relationship between Workflow Engine rules and profiles
- ☐ How the Workflow Engine evaluates properties

Lesson 7: Users & Providers: Enable End Users to Log In and Care for Patients

Users & Providers: Enable End Users to Log In and Care for Patients

Users and Providers: Enable End Users to Log In and Care for Patients

Anyone who needs to log in to Hyperspace needs his/her own user record. User records determine how and where a user logs in, and what access they have within Hyperspace.

Depending on the type of work a user does in Hyperspace, they may also need a provider record. Users who will do clinical documentation, be scheduled with patients, or be referred to or from need a provider record.

A provider record is linked to a user record.

Review and Experience Epic as an End User

Yesterday, you learned about several settings that help customize the clinical end user experience. To assign those clinical settings, there are several staff-related records that must be configured appropriately. When end users at your organization use Epic, these records control the basics of their system access and workspace configuration. This first section of the chapter can help you review what you covered yesterday and get an idea for what you will see in the remainder of the course.

Instructor Demo: End User Workflow

Andy, a pediatrician, will log in and complete some patient-related tasks.

Log In

1. Your instructor will open Hyperspace and enter Andy's ID and password.
2. Your instructor will accept the default login department.

What other end users did you use to log in to Hyperspace in your Fundamentals class? In what other departments did they work?

ANSWERS WILL VARY BASED ON FUNDAMENTALS CLASS.

An end user's ID and password, as well as his default login department, are controlled by the **user** record. You will discuss this record in more detail in this chapter.

Find Activities

After logging in, Andy reviews the patients on today's schedule.

The first screen an end user sees upon logging in is called the startup activity, also referred to as the home workspace. Common startup activities include (but are not limited to) the Schedule, L&D Greaseboard, Snapboard, Status Board, and In Basket.

What other startup activities (or home workspaces) do you remember from the end users you saw in your Fundamentals class?

ANSWERS INCLUDE: IN BASKET, DASHBOARD, PATIENT LIST, STATUS BOARD, SNAPBOARD, THE BRAIN

1. Your instructor will show the startup activities available to the pediatrician.
2. Your instructor will open the Epic menu, showing that the options are appropriate for a pediatrician.

The startup activities available to an end user, in addition to menus like the options under the **Epic** button and across the toolbar, are controlled by the **role** record. You will explore this record in more detail and see what else it can control later in this class.

Care for Patients

Andy has several patients on his schedule. When he opens an encounter from his schedule, he can do clinical documentation related to the patient and the visit.

What other users could potentially be scheduled with patients and do clinical documentation in their charts?

ANSWERS INCLUDE: PHYSICIAN ASSISTANTS, SURGEONS, THERAPISTS, ANESTHESIOLOGISTS, PACU NURSES

What users wouldn't meet those criteria?

ANSWERS INCLUDE: UNIT CLERKS, FRONT DESK SUPPORT, RECEPTIONISTS, SCHEDULERS

A user who should be scheduled with patients or clinically document in patients' charts also needs a **provider** record. You'll discuss other qualifications to determine who or what needs a provider record later in this chapter.

Review: Explore Details

1. Your instructor will open Isaac's encounter from the schedule and go to **Chart Review > SnapShot**.

What record controls details within activities like the tabs in Chart Review, or the default report in SnapShot?

PROFILE

What style of print group do you see in the SnapShot report?

NATIVE HTML

Access Various Functionality

In the patient workspace, the pediatrician has access to various functionality.

1. To write a progress note, your instructor will access the **Notes** activity (in the sidebar).
2. In the **Plan** activity (on the left), your instructor will add a visit diagnosis.
3. Your instructor will place and sign an order.

What other end users might have access to these pieces of functionality?

ANSWERS INCLUDE: NURSES, THERAPISTS, RESIDENTS, PHYSICIANS, PHYSICIAN ASSISTANTS

When would you want to restrict access to these and other activities?

ANSWERS INCLUDE: UNIT CLERKS, FRONT DESK STAFF, RECEPTIONISTS

Your access to functionality (like writing notes, adding diagnoses, and signing orders) is controlled by **security class** records. You'll learn more about records in the Security Class master file and how security classes are assigned to end users later in this class.

Review: Use a Customized Workspace

1. The navigator in the Plan activity is appropriate for pediatricians seeing a patient of this age in this type of encounter.

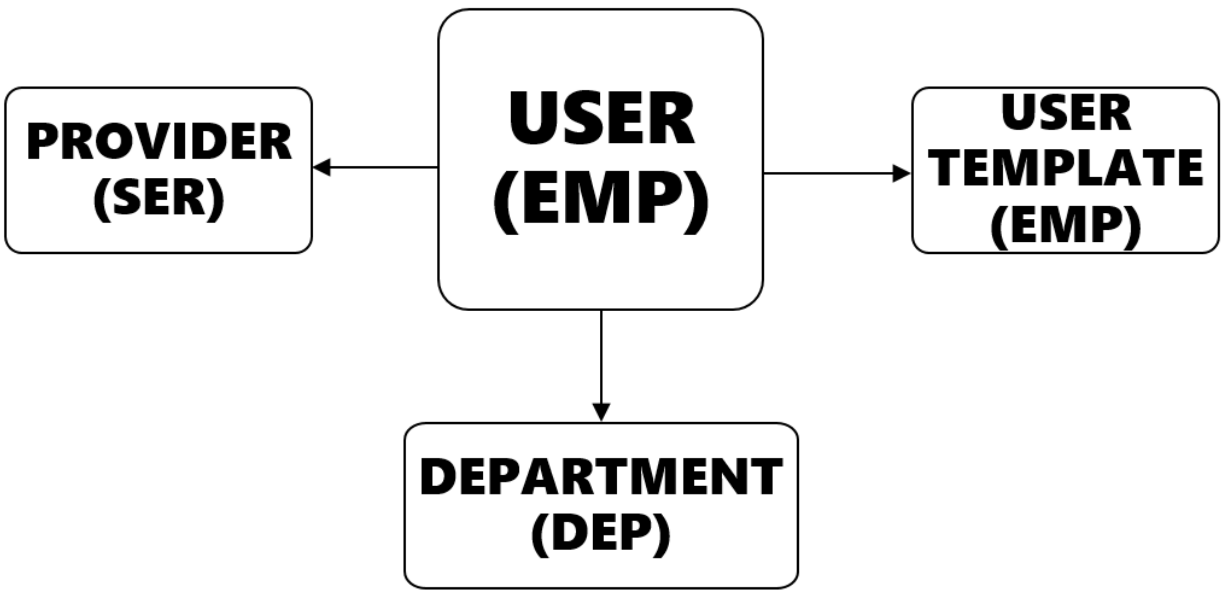
What type of record changes a workspace based on context?

WORKFLOW ENGINE RULE

The Big Picture

In previous chapters, you learned about settings to configure clinical tools in Hyperspace. The user record is the central place where you can ensure that an individual experiences those settings.

Everyone who logs in to Epic needs a user record; in the first half of this lesson, you'll explore what user records control and how to configure them efficiently.



Configure User Records

The User (EMP) master file contains one record for every person who needs to log in to Hyperspace. User records not only control IDs and passwords, but also establish important links to other records that determine access to functionality and Hyperspace configuration.

Instructor Demo: Explore a User Record

In this section, your instructor will explore a user record. Your Andy's user record has many of the same settings within it.

Your pediatrician end user is successfully able to log in to Epic with the user ID, password, and default login department set up in his user record. His access to activities, Hyperspace configuration, and other settings are all being controlled by the user template which is linked from his individual user record.

1. Your instructor will log in to Hyperspace as a builder and open Andy's user record.

Enter Basic User Information

For your user to log in to Hyperspace, you must activate the user record and define a password.

A user's **Status** controls whether or not he can log in. If it's inactive, then the user cannot log in.

From this screen, you can also change a user's password, set it to expire, and provide a system login.

> The ID you assign to your user record should not be changed after its creation. Using the **System login** field allows you to adjust the login ID based on error or a change in name. The ID you enter in the **System login** field will become another login ID for that user. If the **System login** field is left blank, the ID you assign at record creation will be the only login ID.

Set up a User's Default Login Department

Whenever a user logs in to Epic, he logs in to a specific department. He's either automatically logged in to his default login department, or he has the opportunity to select a different department.

Even users who float between departments should be assigned a default login department. If one department is the default, there will be times when the user won't have to manually choose where he logs in.

Andy will primarily be logging in to the pediatrics department for your clinic.

1. Your instructor will click the arrow to the left of Hyperspace/Shared to expand the section.
2. On the Login Settings form, Andy's default login department is listed.

Link a User Record to a User Template

An ID, a password, and default login department are not the only important settings to make in the user record. The user record is a hub in which many other records are assigned to create the appropriate Hyperspace experience.

Instead of making those settings in this individual user record, you can link to a **user template** which will give you all the settings you need. In the future, you can create more pediatricians and link them to the same template.

User templates (or linkable templates) are also records in the User (EMP) master file that allow you to create a single record to maintain shared settings for multiple user records. You create a user template for a particular group of users (for example, medical assistants). In the template, you assign the access to activities, Hyperspace configuration, profiles, and other settings appropriate to that group.

When you create a user record for an individual belonging to that group, you can link his user record to the linkable template and the template's settings will apply to that user record. If you change the template, all of the linked users are automatically updated to reflect the change. This makes it much easier to maintain user records.

1. Your instructor will go to the **Linked Templates** form.
   - In the **Template** column, a TRNCLN## Pediatrician Template is assigned to Andy, which gives him settings shared amongst a group of users. To see the effects of this template, you'll explore another form in the user record.
2. Your instructor will open the **Mobile Apps** form.
   - Here you can see several settings that have been made for this Andy pediatrician.

Where are these settings coming from?

LINKABLE TEMPLATE

Fields on this form are filled in with values, but they are grayed out.

How do you think these settings could be changed?

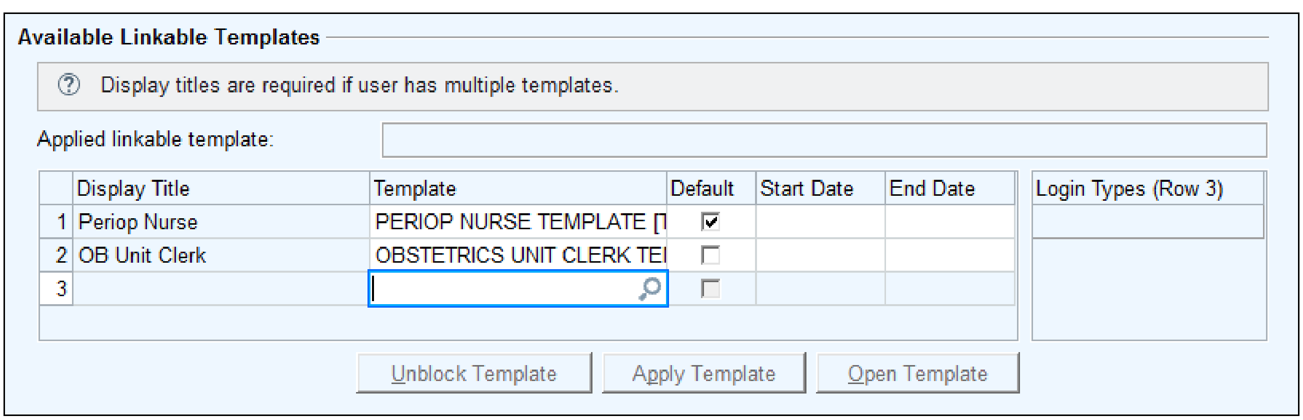
EDITING THE LINKABLE TEMPLATE

For individual users who need special settings different from what is assigned in the linkable template, you can leverage a record called a subtemplate. Subtemplate settings override settings in the linkable template for the affected user. To learn more, check out the **Using Templates to Create and Maintain User Records Setup and Support Guide** on Galaxy.

Assign Multiple Linkable Templates to a User

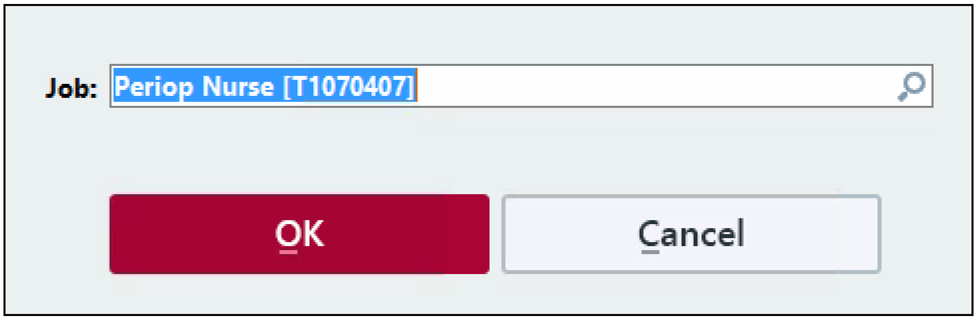
Individual user records can be linked to more than one user template. This can be helpful in several situations:

- An end user at your organization has different job responsibilities on different days of the week. For example, he might work as a unit clerk on weekends and a nurse on weekdays.
- Some of the clinical end users at your organization are working on the project team to help with Epic implementation before returning to their normal duties full time.
- Providers who are assigned an ambulatory template should be assigned a more robust template with inpatient settings after a certain date once the hospital at your organization goes live.



Linked Templates form in the user record

When a user has more than one template linked to their user record, the user chooses which "job" they are performing during that login session:



Only one linkable template record will affect the user at any given time in Hyperspace. Settings in multiple linkable templates do not build upon or override each other; the user chooses a template by selecting a job at login, and settings from any other linkable templates assigned to that user are ignored.

Link a User to a Provider Record

1. Your instructor will click the arrow to the left of **EpicCare** to expand the section.
2. The **Provider/Hot-Keys** form provides a field to link Andy's provider record.

When linking a user record to a template, what are some settings still established by each individual user record?

<u>ID AND PASSWORD</u>

<u>DEFAULT LOGIN DEPARTMENT</u>

<u>LINK TO PROVIDER</u>

Fix Incomplete User Record Build

Another pediatrician at your organization, Laura, needs to be able to log in to Hyperspace to care for patients. She needs the same settings as other pediatricians at the clinic. Additionally, because the organization is in the midst of preparing for go-live, Laura is working on the IT side as a member of the project team. She's going to need to be able to work as both a pediatrician and a physician builder when she uses Epic.

Confirm User Record Settings

1. Log in to Hyperspace as your builder.
2. Click **User (EMP)** (search: User Security).
3. In the User Selection window, confirm **Selection Type** is **Edit single user**.
4. Search for your Laura's user record using the name or ID from your information sheet.
5. Click **Accept**.
   - You are brought to the Snapshot form.
6. Expand the **Hyperspace/Shared** form.
7. Click the **Login Settings** form and confirm that **Default login department** is TRNCLN## Pediatrics.

Link Your Pediatrician to Multiple Templates

Because Laura has the same needs as Andy, you will link her user record to the pediatrician template also assigned in Andy's user record. Additionally, Laura is working as part of your project team temporarily, so she will need different builder-specific settings available to her when she logs in.

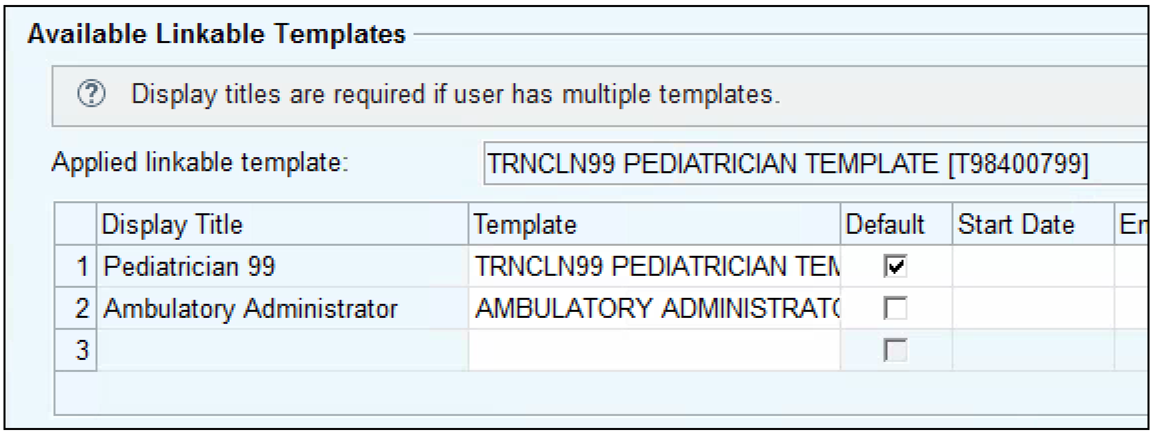
1. Go to the **Linked Templates** form.
   - Laura does not currently have any linkable templates assigned.
2. In the **Template** field on the bottom of the form, link to your TRNCLN## PEDIATRICIAN TEMPLATE.
   - Both Andy's and Laura's user records are linked to the same template.

Laura is splitting her time between caring for patients and working on the project team, but she still spends more time working as a pediatrician.

3. Select the **Default** check box next your TRNCLN## Pediatrician template.
   - You only need to select a default template if you are assigning more than one template to your users. With just one template, the default selection will be made automatically.

Now you need to link Laura's user record to a template with administrator-related settings.

4. Now, link to AMBULATORY ADMINISTRATOR TEMPLATE (T2108001).



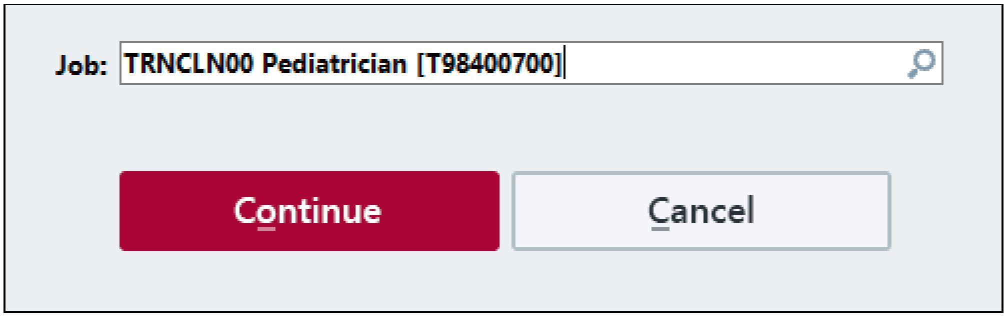
Linked Templates form in Laura's user record

5. You are finished with Laura's user record build! Click **Finish**.
6. When prompted to save your changes, click **Save**.
7. Log out.

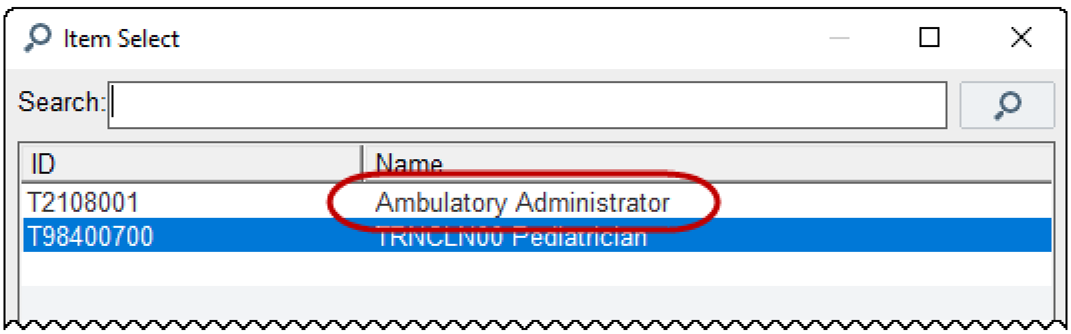
Exercise 1: Test Your Laura Pediatrician's User Record

In this exercise, you and a partner will each select one of Laura's respective linkable templates at login and compare differences.

1. Determine together who will be Partner A and Partner B.
2. **A & B:**
   - Log in to Hyperspace as your respective Laura users, clicking **OK** or pressing **Enter** one time after entering the ID and password.
   - Observe the **Job** prompt. The text you see is from the **Display Title** field you saw when linking to templates in Laura's user record.



3. **A**: Confirm that the field says "Pediatrician ##" and press **ENTER**.
4. **B**: Click the magnifying glass. Your choices are from the two templates assigned in Laura's user record. Select Ambulatory Administrator.



5. **A & B:** Confirm your default login department is TRNCLN## Pediatrics, and press Enter.
6. **A & B:** Compare your startup activities.
   - **A**: Because you chose the default pediatrician template, you get the tools and configuration appropriate for pediatric providers. For example, your startup activity is the Schedule.
   - **B**: Because you chose the administrator template, you get the tools and configuration appropriate for project team members. For example, your startup activity is the Amb Project Team Build Homepage.
   - Depending on what Laura is doing in Epic, during login she can choose which job duties she is assuming. Her selection determines which of the two templates assigned to her will influence what she can see and do in the system.
7. **A & B:** Log out.

> If a user has more than one linkable template assigned in their user record, they can change jobs without logging all the way out. To change jobs, go to **Epic** > **Change Job.**

Configure Provider Records

Many people who need user records will also need provider records. If an individual has both a user record and a provider record, those two records need to be linked.

User Records vs. Provider Records

Who Needs a User Record?

Everyone at your organization who uses Epic will need a user record. The User (EMP) master file needs a record for each end user: doctors, nurses, front desk staff, billers, etc. Without a user record, employees at your organization will not be able to log in to Hyperspace.

Who Needs a Provider Record?

Many of Epic's clinical users have both a user record and a provider record.

A person or resource will need a provider record if at least one of the following criteria is met:

- Can give or receive referrals
- Can be scheduled with patients in Epic
- Can do clinical documentation on a patient's chart (in activities like Notes, Flowsheets, the MAR, etc.)

Identify Users and Providers

Your instructor will guide you through this exercise to determine whether these fictional people and machines require user records, provider records, or both.

	User	Provider
Dr. Walt Whitecoat *(Employed family practitioner)*	X	X
Deb Gurney, RN *(ED nurse)*	X	X
Elma Yorkstein *(Unit clerk)*	X	
Dr. Ila Nevalogin *(Referring cardiologist)*		X
Open MRI Machine *(Specific imaging device)*		X

Explore a Provider Record

A provider record has been configured for Laura. You will explore some of the settings in this record with your instructor.

1. Log in to text as your builder.
2. From the Training Application Access Menu, choose **Clinical Administration** and enter past the copyright screen.
3. Choose **Users/Providers**, and then **Providers**.
4. At the **Provider/Resource** prompt, enter the ID of Laura's provider record.
5. Open the most recent contact.
6. You are brought into Laura's provider record.
7. Observe the following on the first screen:
    - **Abbreviation**. This shows up on various reports.

- **External Name**: The provider's full name (case sensitive) as it should appear in professional documents and patient correspondence. It also appears when a clinician clicks Mark as Reviewed in some (but not all) navigator sections.
- **Provider Type**: The provider's classification in terms of education and services provided. Among other things, it can be used for Workflow Engine rule setup, color-coding notes, and filtering BestPractice Advisories.
- **Linked User:** Recall from earlier in this chapter that the link between a user and provider record is actually defined within the user record. When that link is made, it also appears as a view-only field in the provider record.

8. Try reading help text (**SHIFT + F5)** for any of the following required fields. To leave help text, press **ENTER** and **TAB** to the next field:
   - **Scheduling Type**
   - **Ref Src Type**
   - **Internal/External**

Specify Departments for Scheduling

The **Departments** field in a provider record indicates in which departments the provider can be scheduled. Providers can only be scheduled in these departments.

> **!** This **Departments** field does NOT determine a user's default login department. The latter is defined in the user record. Note that clinicians who are never scheduled with patients (like registered nurses in the hospital) should have nothing listed for **Departments** in the provider record.

1. Confirm that your TRNCLN## Pediatrics department is listed as a schedulable department for Laura.

Configure the Credentials and Certifications Screen

To practice medicine or provide patient care, providers attain licensure (Medical Doctor, Registered Nurse, Pharmaceutical Doctorate, etc.). In official documentation, a licensed clinician typically includes the initials of her license (MD, RN, PharmD, etc.) along with her name.

The **License for Display** field is used to record the license that should display after a provider's name.

1. Page down until you reach the **Credentials and Certifications** screen.

- "MD" is listed as Laura's license for display.

If you only need to display credentials and don't need any other provider record settings, it is also possible to set up credentials on the EpicCare form in the user record.

Configure a Provider's Ordering Privileges

The fields described in this section determine whether the provider's name can be listed on an order as the person legally responsible for it.

Not everyone has the authority to sign for or take legal responsibility for orders for patients.

Laura should be able to initiate and authorize medications and orders without supervision in both inpatient and outpatient contexts

Designating a provider as an **Authorizing Provider** does not give him the ability to sign orders in Epic. This setting does allow the provider's name to be selected as the authorizing provider for an order.

The ability to access the Order Entry activity and sign orders is controlled by user security, which will be covered in a later lesson.

On the Proxy Provider Information screen, designate a clinician's privileges to initiate and authorize orders.

1. Page down until you reach the **Proxy Provider Information** screen.
2. Use **SHIFT+F5** to learn more about the following fields:
   - **Meds Authorizing Provider**
   - **Orders Authorizing Provider**
   - **Supervising Provider**
3. You're done! Press **Shift+F7** to exit your record.

Not all provider record settings are owned by clinical teams. Check out the **SER Fields and Owners** spreadsheet on Galaxy for more information about items in the provider record and who is responsible for them.

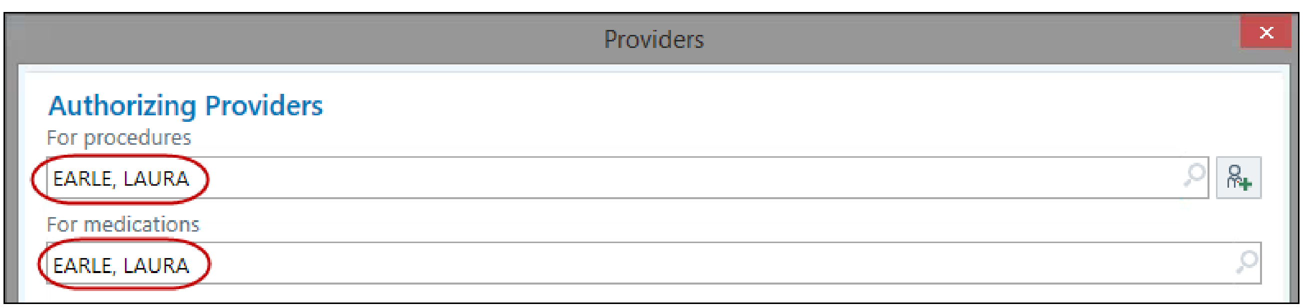
Exercise 2: Assign a Provider to a User

Now that you've explored a provider record, you need to assign (link) that provider record to the appropriate user record.

1. Log in to Hyperspace as your builder.
2. Using a link on the administrator dashboard, open the **User (EMP)** activity (search: User Security).
3. Search for your Laura pediatrician and accept the first contact.
4. Expand the **EpicCare** form by clicking the arrow.
5. Select the **Provider/Hot-Keys** form.
6. In the **Link to provider** field, search for your assigned last name or provider record ID to match on your Laura's provider record.
7. Click **Finish** to save and close your record.
8. Log out of Hyperspace.

Test Your Work

1. Log in as your Laura pediatrician. For **Job**, choose TRNCLN## Pediatrician.
2. Open an existing encounter with your Richard patient using **Epic > Patient Care > Encounter**.
3. In the Plan activity, go to the Meds & Orders section, and click **Providers**.
   - Laura will be listed as the authorizing provider by default. Her provider record for authorizing orders is now associated with her user record for logging in to Hyperspace.



Providers window

Instead of building user and provider records one by one, you will likely use an importing process at your organization which can create or update several records at once. You'll learn more about this process in future classes and when working with your Epic representative.

Reviewing the Chapter

Review Questions

1. Who or what needs a user record?
   EVERYONE AT YOUR ORGANIZATION WHO LOGS IN TO EPIC.
2. True or False: You can link a user to multiple linkable templates.
   TRUE. YOU CAN ASSIGN MORE THAN ONE TEMPLATE TO A USER, AND THAT USER CAN CHOOSE THE TEMPLATE THEY WANT TO AFFECT THEM WHEN THEY LOG IN TO HYPERSPACE.
3. What are some settings you must make in an individual user record which cannot be set with linkable templates?
   DEFAULT LOGIN DEPARTMENT, LINK TO TEMPLATES, ID/PASSWORD INFORMATION
4. Give an example of someone who would need a provider record but NOT a user record. Explain why.
   A PHYSICIAN IN YOUR COMMUNITY WHO GETS REFERRALS FROM YOUR PHYSICIANS, BUT WHO DOES NOT HAVE ACCESS TO LOG IN TO YOUR EPIC SYSTEM.
5. Why do MRI machines and classrooms need to have records in the Provider master file?
   THE MRI MACHINES AND CLASSROOMS ARE SCHEDULED RESOURCES.
6. True or False: In the provider record, you can link to the corresponding user record or a user template.
   FALSE. THE LINKING IS ESTABLISHED IN THE USER RECORD. MULTIPLE USERS MAY NOT BE LINKED TO THE SAME PROVIDER RECORD.

Review Key

1. Who or what needs a user record?
   EVERYONE AT YOUR ORGANIZATION WHO LOGS IN TO EPIC.
2. True or False: You can link a user to multiple linkable templates.
   TRUE. YOU CAN ASSIGN MORE THAN ONE TEMPLATE TO A USER, AND THAT USER CAN CHOOSE THE TEMPLATE THEY WANT TO AFFECT THEM WHEN THEY LOG IN TO HYPERSPACE.
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   FALSE. THE LINKING IS ESTABLISHED IN THE USER RECORD. MULTIPLE USERS MAY NOT BE LINKED TO THE SAME PROVIDER RECORD.

Study Checklist

Make sure you can define the following key terms:

- ☐ User record
- ☐ Linkable template
- ☐ Default login department
- ☐ Provider record

Make sure you can perform the following tasks:

- ☐ Find a user record in Hyperspace
- ☐ Change and/or expire a user's password
- ☐ Give a user a default login department
- ☐ Assign a linkable template to a user
- ☐ Test that you built a user record correctly
- ☐ Find and navigate a provider record in text
- ☐ Link a user and provider record

Make sure you fully understand and can explain the following concepts:

- ☐ Who needs a user record
- ☐ The advantages of linking a user to a template
- ☐ The advantages of linking a user to more than one template
- ☐ Differentiate between user-specific settings and user template settings
- ☐ Who (or what) needs a provider record
- ☐ Who needs both a user and provider record
- ☐ Differentiate between provider-based versus user-based settings

Lesson 8: Security Classes: Give an End User Access to Activities

Security Classes: Give an End User Access to Activities

Security Classes: Give an End User Access to Activities

In this lesson, you will learn about the different aspects of security in Epic, and you will explore how to build, edit, and assign security classes for the end users at your organization.

You've already learned how to leverage user templates to share settings across a group of users with the same job role. One function of the user template is to assigned access to activities in Epic. This access is controlled by records in the Security Class (ECL) master file. Security class records can be shared, so assigning them in the template is an efficient way to grant access to groups of users.

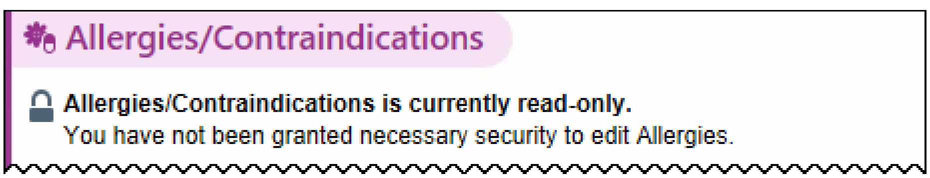
Common Security-Related Problems

To start this lesson, you will see an example of an issue that end users at your organization might face after go-live. These and other access-related issues are consequences of improper security class assignment.

Your Andy pediatrician is in an appointment with his patient Isaac. While working on the Rooming tab in his patient workspace, Andy opens the Allergies section to make sure Isaac's list of allergies is up to date. When he tries to add a new allergy, however, he can't find anywhere to document new information. He notices the message on the screen that the section is currently read-only, and calls the help desk in frustration.

You receive word of this issue, and the help desk informs you that several other pediatricians have already called about the section being read-only. You need to make sure all your pediatricians can update allergies for patients by adjusting their access to editing allergies.

The screen shot below represents how the Allergies section currently looks for your pediatricians.



Now that you've seen an issue related to security, you will learn the basics of the Security Class (ECL) master file. Then you will explore the analysis and troubleshooting involved in making sure your end users have the access they need.

Overview of Security

In this section, you will become familiar with the three main components of security, and you will discuss some security-related terminology.

Security Points

Security points are individual keys to pieces of Epic functionality. Each activity (like Chart Review) is associated with one or more security points. If users have the security point, they have access to the activity. If they do NOT have the required security point, then they will not be able to launch the activity. In most cases, users won't even see the activity if they don't have the security point.

For example, Dr. Whitecoat has EpicCare security point 16 (Chart Review) which grants him access to the Chart Review activity. He also has Inpatient security points 5 (Patient Summary) and 9 (Patient Lists), so he has access to those activities as well. He does NOT have ASAP security point 6 (Transfer within the ED), so he does NOT have the ability to reassign patients using Epic's ASAP Emergency Department module.

Not every security point grants access to an activity. Some security points grant access to specific functionality within various activities.

For example, Dr. Whitecoat has EpicCare security point 4 (Rx Non-Controlled) which allows him to sign orders for non-controlled medication orders. This applies any place in the system where he can sign orders: in the Order Entry activity in his clinic, in the Rounding Navigator in the hospital, or even when connecting remotely via EpicWeb.

Security points are typically referred to by the *type* of security class they are found in (Inpatient, EpicCare, Emergency, Shared, etc.) and a number.

In some of Epic's applications, security points can be either permissive or restrictive. Permissive security works as described in this section-it gives you access to a piece of functionality. A restrictive security point works the opposite way-if you have the point, then you LOSE access to the activity or piece of functionality.

With the exception of some Home Health security points, all security points in Epic's clinical applications (EpicCare Ambulatory and Inpatient, ASAP, Willow, Beacon, Radiant, Cupid, OpTime, Anesthesia, Stork, etc.) are permissive.

Types of Security Points

There are many different types of security points: one type for almost every Epic product (e.g. EpicCare Inpatient, ASAP, and Home Health), and additional types for features shared across multiple products (e.g. In Basket).

Think of security types as bowls that hold different kinds of keys. You keep the different types of keys separate since they unlock different types of things.

Having many types of security points is beneficial if you consider the following:

- **The large number of security points that exist.** There are thousands of security points to choose from since each one controls access to a piece of functionality in Epic. Organizing security points into types makes security configuration a lot more manageable.
- **Current and future security changes.** With every release, new security points are added to grant access to new functionality. Thanks to this new functionality, each type of security has become more robust and distinct. New security points are easier to accommodate and organize in specific types of security.
- **Ease of maintenance.** When security-related issues arise, administrators can pinpoint where to make changes based on the type of access that is incorrect.

Fill in the following table with your instructor to learn the main types of security points covered in this class.

Type of Security	Who needs it?	Example Security Points
IN BASKET	ALL USERS	1- Use Out Basket 3- Edit Pools
SHARED	ALL USERS	11- Edit SmartText 51- Provider Finder
REPORTING WORKBENCH	ALL USERS	1- My Reports 32- Report Viewer Printing
EPICCARE	ALL USERS OF CLINICAL TOOLS	16- Chart Review 4- Rx Non-controlled
INPATIENT	ALL USERS OF CLINICAL TOOLS IN A HOSPITAL SETTING	58- Care Plans 81- Discharge Writer

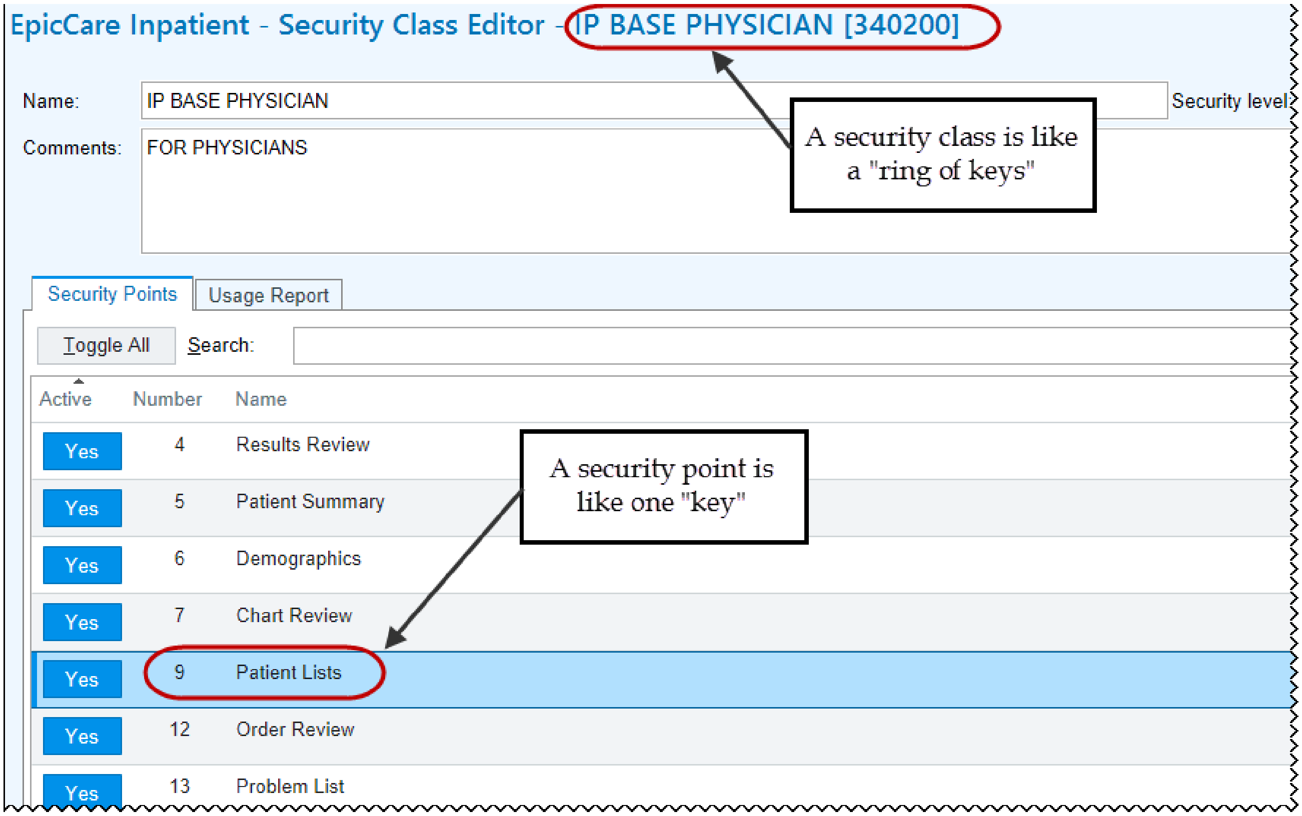
Security Classes

Instead of giving individual security points directly to users, security points of the same type are lumped into security classes, like rings of keys, and then assigned to the appropriate groups of users.

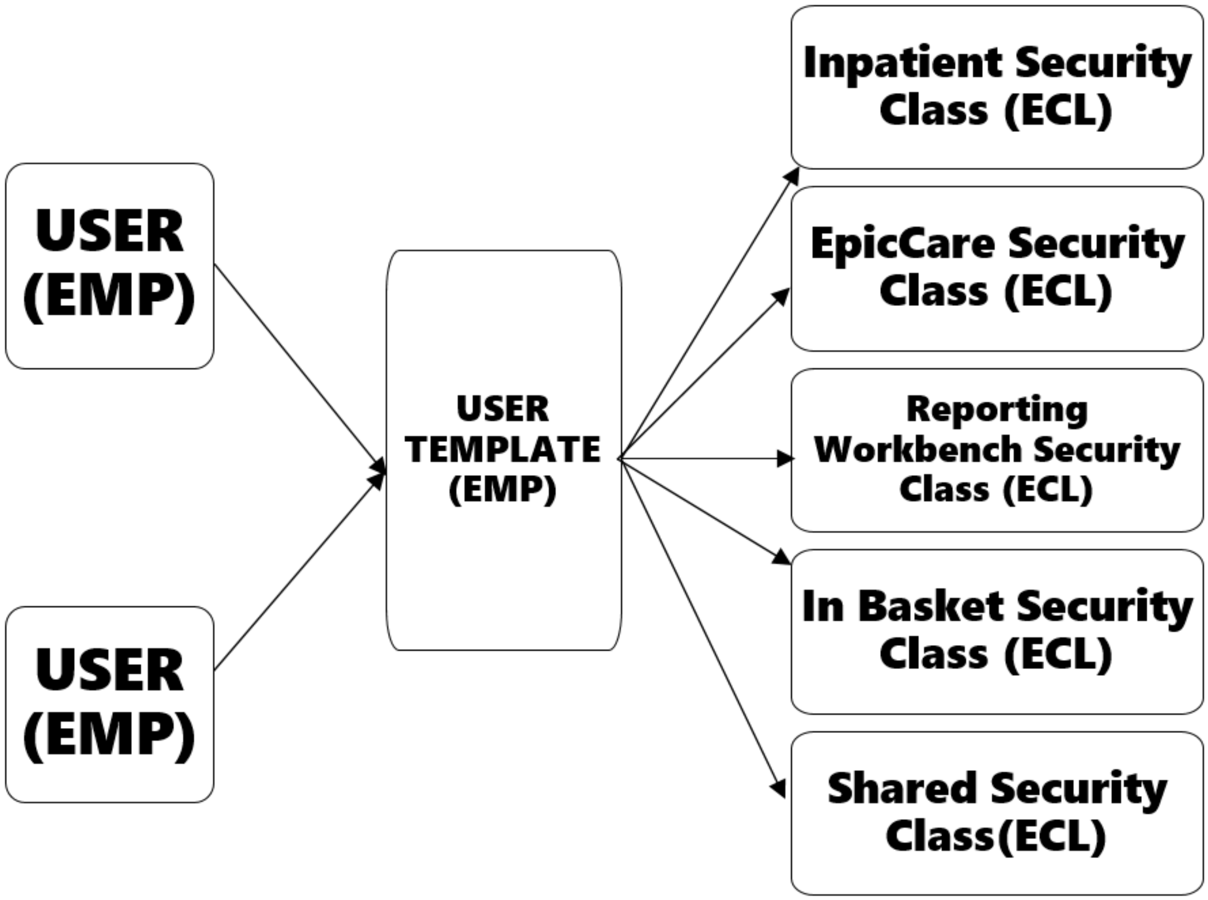
There are many security points within each type; EpicCare alone has over 200 available security points. No user needs every security point. Administrators must determine which security points are appropriate for different groups of users at an organization.

Many users can share the same security class. If a group of users needs a security point added or removed, administrators adjust the appropriate security class and all the users linked to it are automatically affected.

Most of the security classes you will use in class can be accessed from Hyperspace.



Categorization by security types makes sharing security classes more feasible, decreasing the amount of build needed to accommodate each end user. A user template will contain several security classes, which can give different types of access to the affected group of users.



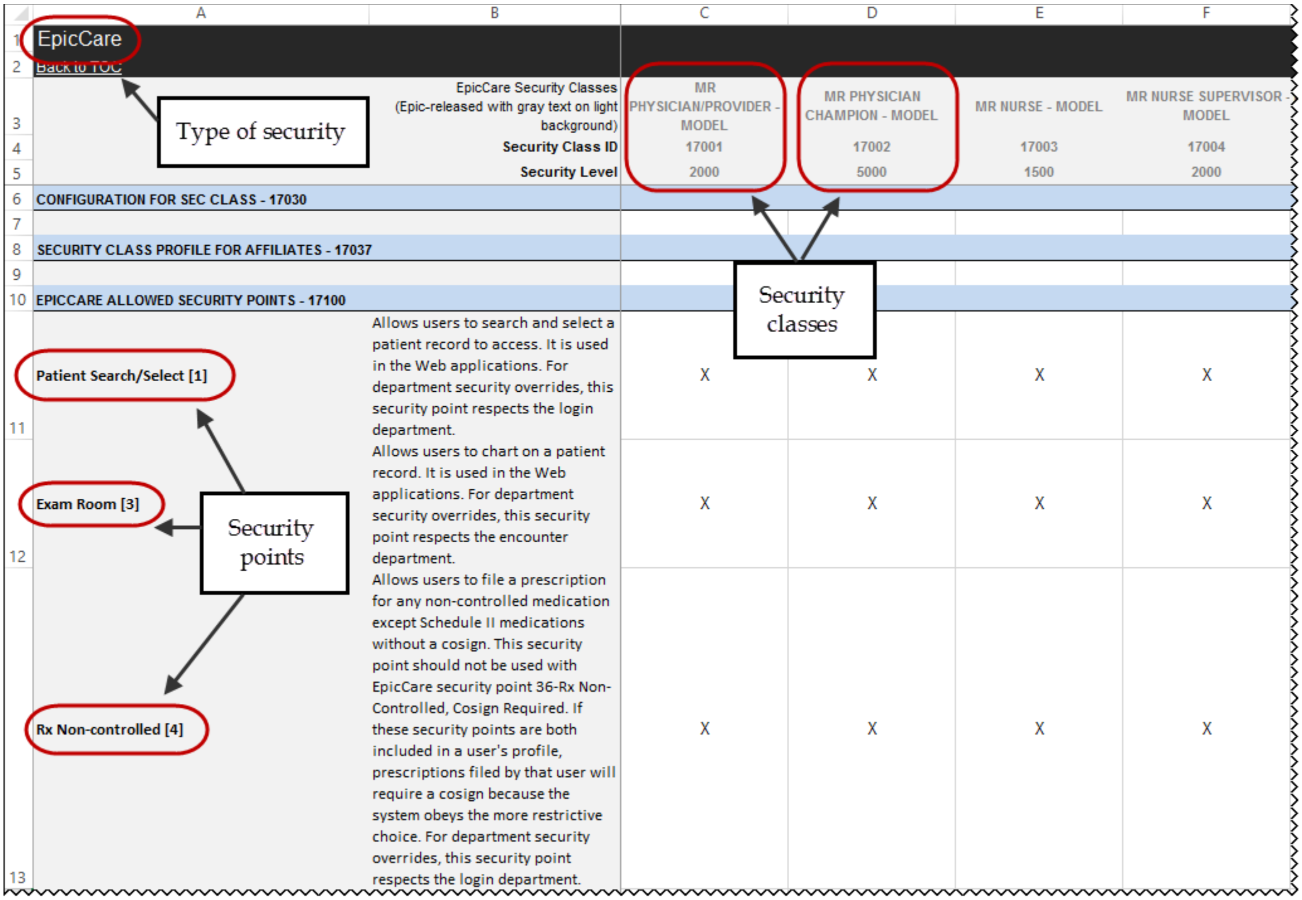
Based on what you have learned about types of security classes, which type of security class do you think you'll need to edit for your pediatricians who can't edit allergies in an office visit?

<u>EPICCARE</u>

Foundation Security Classes

The Foundation System contains security class records that include the security points typical for a given group of users. These are designed to meet the needs of particular groups of users, like physicians who use EpicCare Ambulatory or unit clerks who use EpicCare Inpatient. As much as possible, these security classes are meant to be useable out of the box. You can assign these security classes to your end users with little or no modification.

The Users and Security Matrix (available on Galaxy) contains information about security classes available in the Foundation System. Each type of security class has its own tab. Within those sheets, columns represent specific classes. X's mean the corresponding security points are included in that class.



	A	B	C	D	E	F
1	EpicCare					
2	Back to TOC					
3		EpicCare Security Classes (Epic-released with gray text on light background)	MR PHYSICIAN/PROVIDER - MODEL	MR PHYSICIAN CHAMPION - MODEL	MR NURSE - MODEL	MR NURSE SUPERVISOR - MODEL
4		Security Class ID	17001	17002	17003	17004
5		Security Level	2000	5000	1500	2000
6	CONFIGURATION FOR SEC CLASS - 17030					
7						
8	SECURITY CLASS PROFILE FOR AFFILIATES - 17037					
9						
10	EPICCARE ALLOWED SECURITY POINTS - 17100					
11	Patient Search/Select [1]	Allows users to search and select a patient record to access. It is used in the Web applications. For department security overrides, this security point respects the login department.	X	X	X	X
12	Exam Room [3]	Allows users to chart on a patient record. It is used in the Web applications. For department security overrides, this security point respects the encounter department.	X	X	X	X
13	Rx Non-controlled [4]	Allows users to file a prescription for any non-controlled medication except Schedule II medications without a cosign. This security point should not be used with EpicCare security point 36-Rx Non-Controlled, Cosign Required. If these security points are both included in a user's profile, prescriptions filed by that user will require a cosign because the system obeys the more restrictive choice. For department security overrides, this security point respects the login department.	X	X	X	X

Users and Security Matrix from Galaxy

Edit Security Classes and Assignment

Like other troubleshooting in Epic, you need to first analyze the current security assignment and what changes your group of users need. Then you can proceed to make the security class changes necessary. In this section, you'll learn how to edit security classes from text and Hyperspace. You'll also explore changing security classes in a linkable template and testing security changes.

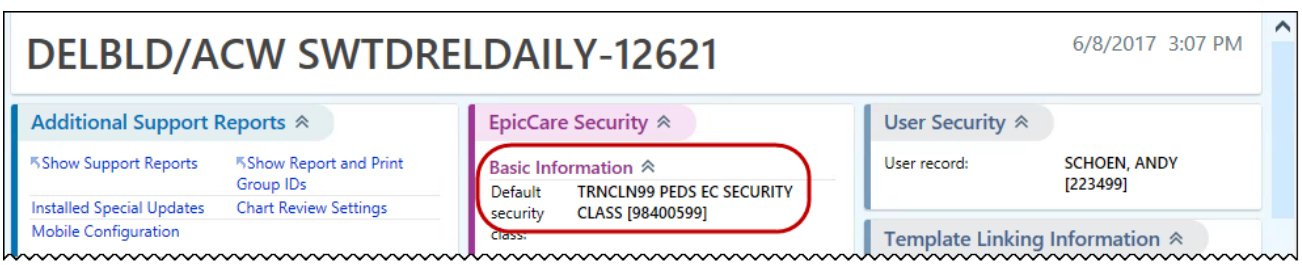
Some security classes can be modified in Hyperspace. In this example, an EpicCare security class is missing a security point that grants access to Allergies functionality. You need to determine which security point to add to that security class, and then you can edit the security class from Hyperspace.

Analyze Security Assignment

You need to figure out which EpicCare security class is assigned to your Andy pediatrician. You're already on the phone with him about his ticket, so you ask him to log in to the system so you can quickly determine what needs to change.

While a builder can open the user template record to determine which security classes are assigned to a particular user, there is a report in Hyperspace which the end user can view and forward.

1. Log in to Hyperspace as your Andy pediatrician.
2. Follow this path: **Epic > Help > Session Information Report**



3. Write down the EpicCare security class assigned to your Andy pediatrician.

EpicCare Security Class
Name:
ID:

Duplicate a Security Class

Andy's current EpicCare security class is TRNCLN## PEDS EC SECURITY CLASS. This record is close to what you need for the pediatricians at your organization, but you need to make a few adjustments for it to be perfect.

For the sake of practicing, you will duplicate this record and edit the duplicate to meet your users' needs. No security points need to be removed, but security to edit the Allergies activity must be added.

Creating and editing a security class takes place in Hyperspace; however, to duplicate a record, you will need to access text. In this exercise, you will practice duplicating a pre-existing security class.

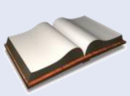
1. Log in to text as your builder.
2. At the Training Application Access menu, select **Chronicles**.
3. At the **Database Initials** prompt, enter the INI of the desired master file (ECL is the INI for the Security Class master file).
4. Enter past the quote of the day.
5. From the Chronicles Main Menu, select **Enter Data**.
6. Select **Duplicate Security Class**.
7. For **Security Class**, look up the security class you want to duplicate: TRNCLN## PEDS EC SECURITY CLASS.
8. For **New SECURITY CLASS ID**, enter an ID of 3333##.
   - Tip: When you don't care about the ID number, you can type * (asterisk) and press Enter for the system to assign an ID
9. At the prompt to name the duplicate, enter "y".
10. For **New Name**, enter: <your initials> pediatrician EC security class.
11. When prompted to confirm, enter "y".

```
Security Class: trncln00 peds
98400500     TRNCLN00 PEDS EC SECURITY CLASS


The following ranges are reserved for released records in this master file:
1 to 999
1100 to 4999
6500 to 6999
9000 to 99999

New SECURITY CLASS ID(.1): 333300
Do you want to give the duplicate record a new name? y
New Name: xyz pediatrician ec security class

Duplicating Security Class 98400500 into Security Class 333300
Continue? y
Copy will now proceed and may take some time
Record Duplication Complete
```

- After the security class duplication is done, you are brought back to the **Security Class** prompt.

12. To go back to the main Chronicles screen, type "opt" and press **Enter.**
13. Select **Quit Chronicles**.
    - You are brought back to the Training Application Access menu

Exercise 1: Edit a Duplicated Security Class



You now need to edit the duplicate record such that it allows access to edit the Allergies section.

In this exercise, you will explore tools available to help you determine how to change a security class.

One tool that can help you determine what each security point does is called the Epic Security Point Dictionary available on Galaxy, Epic's online documentation portal. You can explore this tool later. In this exercise, you'll see a different way to identify the right security points.

1. Log in to Hyperspace as your builder.
2. On the dashboard, open the **Security Class Editor**.
    - If you have trouble finding the Security Class Editor, try using Chart Search in the top right corner of your screen.
3. Open the security class you want to edit: <your initials> Pediatrician EC Security Class.
4. In the **Search** field on the **Security Points** tab, search for "allergy".

5. The Security Class Editor includes help text for each security point. Highlight the Allergy security point (42) and read its corresponding help text (on the right).
6. This looks like the security point you need. Click the **No** button to activate security point 42 (i.e. set it to **Yes**).
7. Click **Accept**.

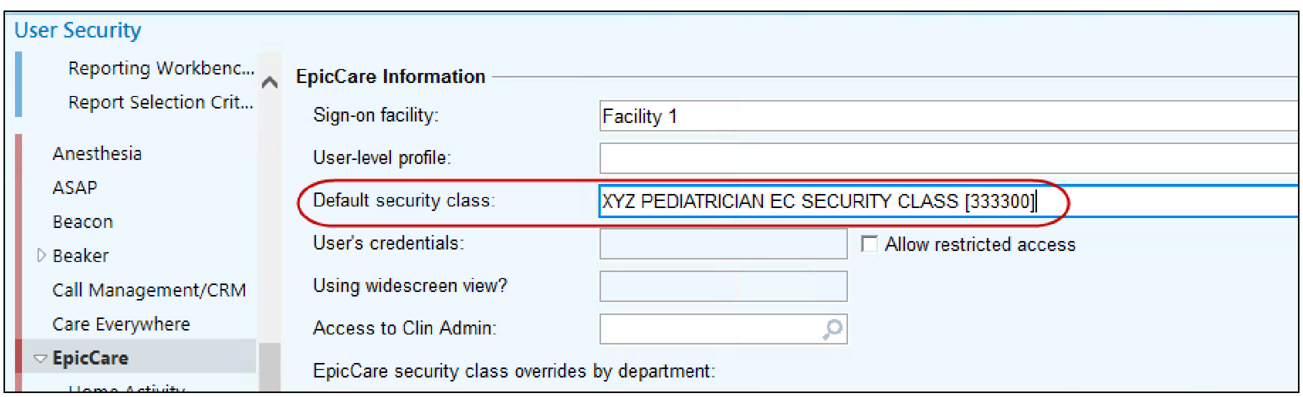
> At this point, will your pediatricians be able to edit allergies? Why or why not?
>
> <u>NO; WHILE WE HAVE MADE THE APPROPRIATE CHANGES TO A SECURITY CLASS, WE STILL NEED TO LINK THAT SECURITY CLASS TO OUR USERS.</u>

Exercise 2: Make Changes to Security Assignment

When you end up creating a new security class through duplication, you need to make sure to assign the new security class record to the users who need their access changed.

> Where do you need to go to change the EpicCare security class for Andy and the rest of your pediatricians?
>
> <u>THE LINKABLE TEMPLATE ASSIGNED TO THE PEDIATRICIANS</u>

1. Logged in to Hyperspace as your builder, open **User (EMP).**
2. In the User Selection window, choose **Edit template record**.
3. Open your TRNCLN## PEDIATRICIAN TEMPLATE record and accept the highlighted contact.
4. On the **EpicCare** form, link your security class in the **Default security class** field: <your initials> Pediatrician EC Security Class (3333##).



5. To save your changes and close your template, click **Finish**.
6. Log out.

Test your EpicCare Security Changes

1. Log in to Hyperspace as your Andy pediatrician.

Who else could log in to test these changes, and why? <u>THE OTHER PEDIATRICIANS, SINCE THEY HAVE THE SAME LINKABLE TEMPLATE AND THEREFORE THE SAME EPICCARE SECURITY CLASS ASSIGNED TO THEM.</u>

2. Open your Isaac patient's encounter from the schedule.
3. In the Rooming navigator, open the Allergies section.
   - You should see an active **Add a new agent** field.

Congratulations! You have successfully corrected the access issue for your pediatricians.

Reviewing the Chapter

Review Questions

1. What function does security perform in Epic?
   SECURITY CONTROLS ACCESS TO FUNCTIONALITY- WHAT A USER IS OR IS NOT ALLOWED TO DO IN THE SYSTEM.
2. Explain the difference between a security class and a security point.
   A SECURITY POINT GRANTS ACCESS TO A SINGLE PIECE OF FUNCTIONALITY; IT'S LIKE A KEY. A SECURITY CLASS IS A COLLECTION OF SECURITY POINTS, LIKE A KEY RING. USERS ARE ASSIGNED A SECURITY CLASS.
3. How do builders assign a security class to a user? USERS ARE LINKED TO SECURITY CLASSES IN THEIR USER OR USER TEMPLATE RECORD.
4. What are three security classes you've learned about that every user needs?
   IN BASKET, SHARED, AND REPORTING WORKBENCH
5. Which type of security controls access to hospital functionality, like the MAR and Flowsheets?
   INPATIENT SECURITY
6. Your organization wants its hospital charge nurses to have administrative access to the Patient List activity (Inpatient security point 1 - Patient List Administrator). Otherwise, their access should be the same as that of other inpatient nurses (who use the IP NURSE Inpatient security class). How would you efficiently take care of this need?
   DUPLICATE THE IP NURSE INPATIENT SECURITY CLASS, AND CALL THE DUPLICATE SOMETHING LIKE IP CHARGE NURSE. ADD TO THE DUPLICATE THE DESIRED SECURITY POINT. LINK ALL OF THE CHARGE NURSES' USER RECORDS (OR A CHARGE NURSE USER TEMPLATE) TO THIS DUPLICATE SECURITY CLASS.

Review Key

1. What function does security perform in Epic?
   SECURITY CONTROLS ACCESS TO FUNCTIONALITY- WHAT A USER IS OR IS NOT ALLOWED TO DO IN THE SYSTEM.
2. Explain the difference between a security class and a security point.
   A SECURITY POINT GRANTS ACCESS TO A SINGLE PIECE OF FUNCTIONALITY; IT'S LIKE A KEY. A SECURITY CLASS IS A COLLECTION OF SECURITY POINTS, LIKE A KEY RING. USERS ARE ASSIGNED A SECURITY CLASS.
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Study Checklist

Make sure you can define the following key terms:

- ☐ Security class
- ☐ Security point
- ☐ Foundation security class

Make sure you can perform the following tasks:

- ☐ Point out elements of Hyperspace that are controlled by security
- ☐ Give examples of security points and the types of security classes on which they are available
- ☐ Analyze whether an existing security class will meet the needs of a group of users
- ☐ Edit a security class
- ☐ Duplicate a security class
- ☐ Find more information about what any given security point controls
- ☐ Assign a security class to a user

Make sure you fully understand and can explain the following concepts:

- ☐ The effect a user's security has on Hyperspace
- ☐ The relationship between security points and security classes
- ☐ The difference between various types of security classes
- ☐ Why a user would need multiple types of security classes
- ☐ The value of using Foundation System security classes as a starting point

Lesson 9: Roles: Configure Hyperspace for an End User

Roles: Configure Hyperspace for an End User

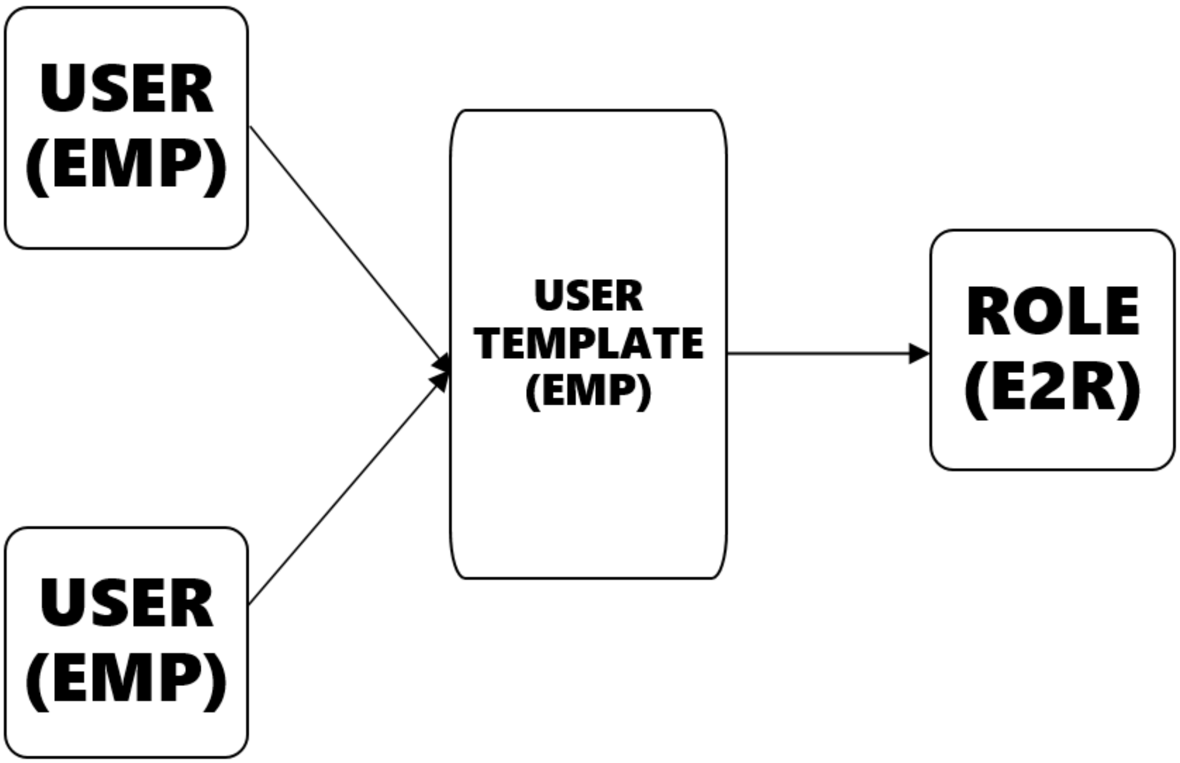
Roles: Configure Hyperspace for an End User

Earlier in this class, you learned how to adjust access to activities and functionality in Epic. Having access to functionality, however, doesn't mean it's easy to find.

In this chapter, you'll learn how role records are used to configure the layout (including the workspaces that appear by default when a user logs in) and ground rules (such as how long a workstation can remain idle before the system times out) for an end user's Hyperspace experience.

The Big Picture

Role records control the layout and rules of Hyperspace. By linking a user template to a role, administrators can apply the same Hyperspace configuration to all users with that template. Multiple user templates can link to the same role.



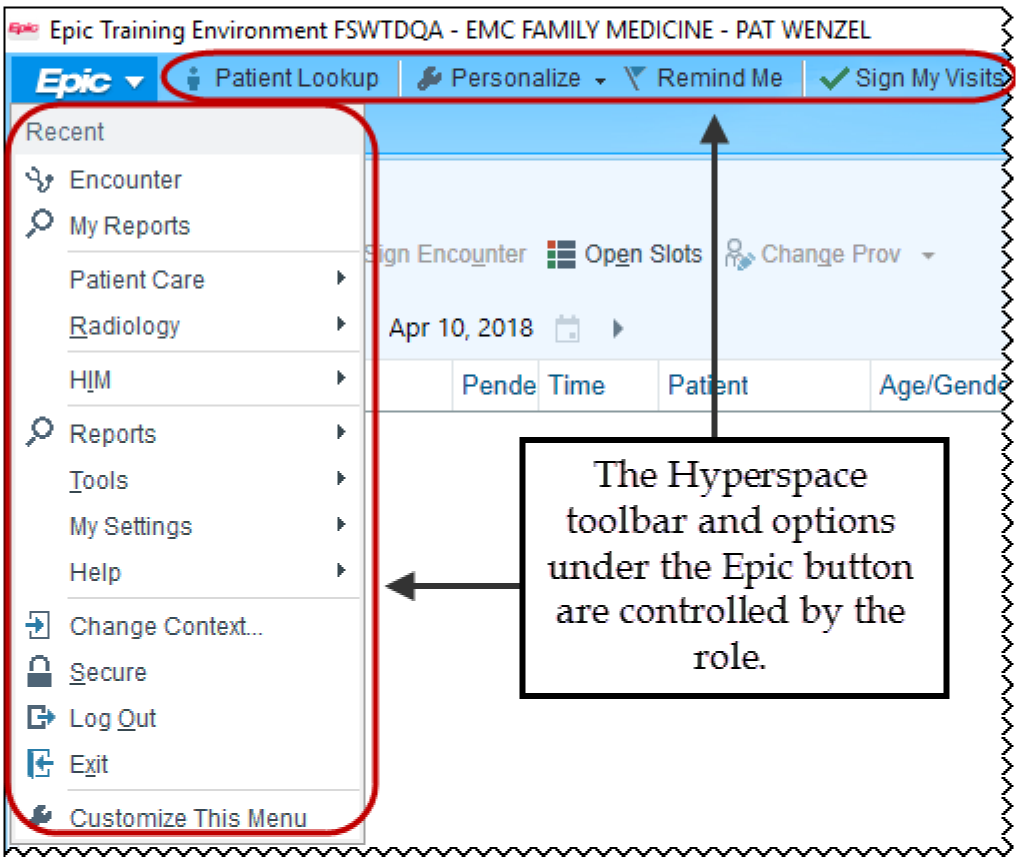
What Does a Role Control?

Roles are records in the E2R master file that define how Hyperspace looks and behaves for a group of users.

> **!** Every user needs a role in order to log in to Hyperspace. This is true even for users of Epic's non-clinical applications like Cadence (scheduling) or Prelude (registration).

Where You Find Activities and Tools

- **Startup activities**: A role controls the activities that are launched immediately upon logging in.
- **Epic button and toolbar layout**: A role controls what appears on the user's toolbars and menus.



Role controls basic Hyperspace layout

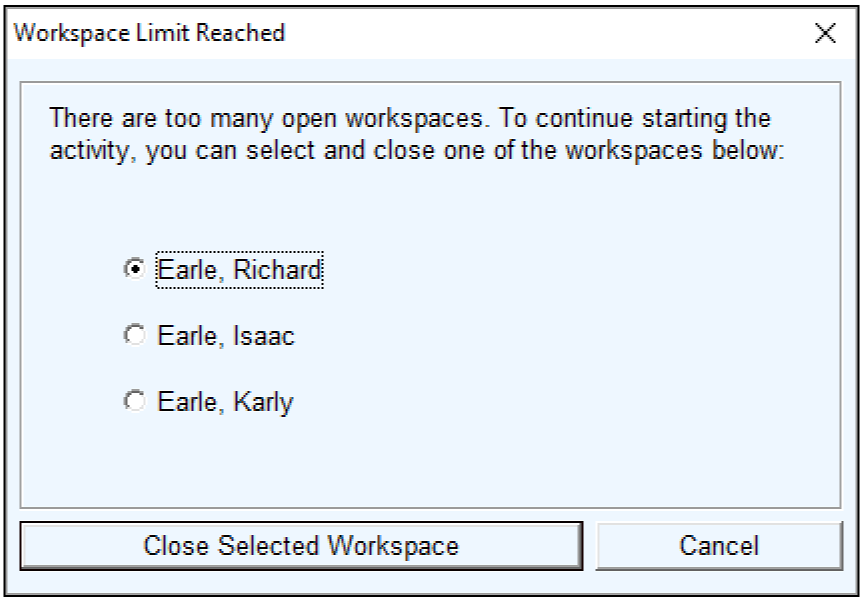
Maximum Number of Workspaces

A role record sets certain ground rules for how Hyperspace behaves. One rule is the maximum number of patient workspaces you can have opened at a time

Hyperspace doesn't allow more than four patient workspaces to be open at a time. This is a hard-coded limit; it cannot be overridden by settings in a role record.

There are two ways to limit patient workspaces.

1. Specify an overall limit.
   - For example, two patient workspaces of any type.
2. Base your limit on the type of workspace.
   - For example, one hospital chart, plus up to three other workspaces.



The number of simultaneous workspaces can be limited by a user's role record

Automatic Timeout

One of the other ground rules that can be set in a role is the timeout-how long a given workstation can be inactive before Epic automatically logs out or secures.

Timeouts can be a powerful tool to protect patient privacy and prevent accidental documentation under another user's name. However, automatic timeout must be used carefully. A timeout that is too quick can be frustrating for end users.

When the timeout is reached, the role can be set to:

- **Secure Hyperspace**: This leaves any patient charts open and allows a user to log in and begin where the previous user left off. NOTE: Securing is NOT recommended for Inpatient users, since it can cause inappropriate locks on a patient's record.

- **Log out of Hyperspace**: This causes any unfiled notes or orders to be automatically pended.
- **Shut down Hyperspace**: This not only logs the user out of Hyperspace, but exits the application. Hyperspace must then be re-launched on that workstation before anyone can log in. This option is rarely used.

The interval to wait for a timeout and the action to take (secure, log out, or shut down) can also be set up system-wide, or based on the workstation where the user is logged in. Speak with your Epic representative for more information regarding configuring timeout in places other than role.

Use Last Login Department

Roles can affect which department is suggested to a user at login.

When a user logs in, the department she is presented with after entering her ID and password is typically the default login department that is set in the user record. The role can override this setting and have the system use the last department selected as the default.

This is particularly useful for users who "float" between different departments or units on different shifts, and who have settings that change based on where they are working for the day.

Instructor Demo: Make Changes to a User's Role

For training purposes, your instructor will open and make changes to existing role records.

Do NOT edit Foundation System Role (E2R) records in the Epic Playground or other practice environments. It's easy to impact the system for an entire group of users unintentionally.

Work closely with your Epic representative before attempting to edit or manipulate a role record in a production environment.

You are refining the staff-related records for your organization, and your pediatricians have noticed some redundancy between their startup activities and Hyperspace toolbar.

Also, based on the decisions of your organization, clinical users should be able to open up to three patient workspaces at one time.

To give your pediatricians the appropriate Hyperspace configuration, you will make changes to the role record linked in their user template.

Determine What Role is Affecting a User

Many important settings are made in the template linked to specific user records. You can identify the role record affecting a user on the User Role form of a user record.

In the previous chapter, you used the Session Information report to see which security classes were assigned to your users. The Session Information report only shows information for the user currently logged in. If as a builder, you want to find out the role attached to a user other than yourself, the Session Information report will not be helpful.

1. Your instructor will log in to Hyperspace as a builder, open Andy's user record, and make note of the role record affecting Andy.

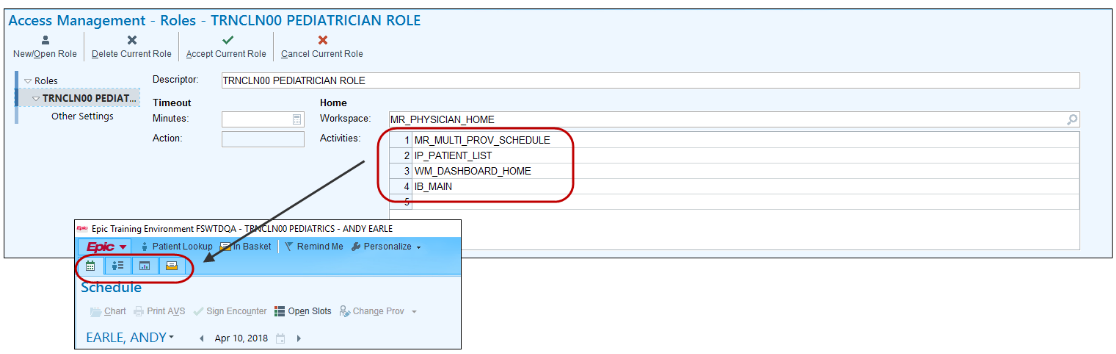
Change a User's Startup Activities

Role records refer to the descriptors of activities and menus that should display. Descriptors are the technical names of activities.

But what if you don't know the descriptor for a startup activity you want? It's often easiest to find an activity's descriptor by looking at the role record of a user who already has that activity. When you know an activity's descriptor, you can easily add it to another user's role.

1. From the dashboard, your instructor will open the Role Editor and open the TRNCLN## Pediatrician Role.
2. Looking at this role record, we can infer the activities associated with their descriptor. Your instructor will remove In Basket as a startup activity in this role record.

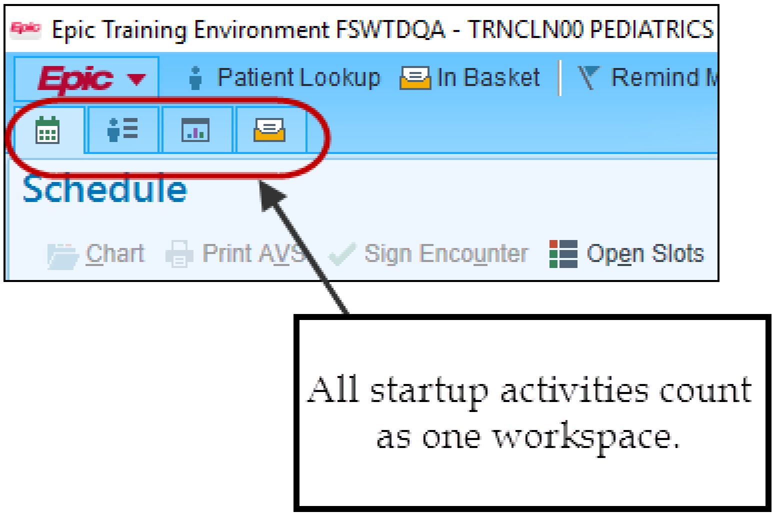
To change the startup activities for a group of users, add or remove entries to the Activities table under the Home section. The activities listed in this field will appear as startup workspace tabs for users with that role record.



If users have the correct security and SignalR is configured, Secure Chat will also appear as a startup activity automatically in addition to startup activities defined in the role record.

Change a User's Maximum Number of Workspaces

A user's role record can limit the number of workspace tabs that can be open at once. Note that the system counts all of the startup activities (the Schedule, Patient Lists, dashboards, and In Basket) as a single workspace.



At any time, your pediatricians should see their startup activities (Dashboard, Schedule, and Patient Lists) and up to three patient charts. What is the number of maximum workspaces that should be specified in their role? Explain.

FOUR. THREE PATIENT WORKSPACES PLUS THE STARTUP ACTIVITIES (ONE WORKSPACE).

1. To set the maximum total number of workspaces, your instructor will enter a value of 4 in the **Maximum workspaces** field at the bottom left of the role record.
2. Your instructor will exit Hyperspace completely to test the changes made to the role record affecting the pediatricians.

Who will be affected by the changes made to the role?

ANDY, LAURA, AND ANY OTHER USERS WITH THE SAME ROLE RECORD.

If you are interested in learning more about role record configuration, the CLN2300v Configuring the Clinical Workspace badge could be right for you.

This virtual class explores additional configuration such as modifying menus, defining available activities, and using patient data to impact what activities display, and much more. Additional details can be found in the Course Catalog of your UserWeb.

After-Class Exercises

As you continue to refine the staff-related records for your organization, you have encountered some redundancy in the role record affecting your pediatricians. You'll need to open the appropriate role record to fix this.

Also, based on the decisions of your organization, clinical users should be able to open up to three patient workspaces at one time.

To give your pediatricians the appropriate Hyperspace configuration, you will make changes to the role record attached to their user template.

Exercise 1: Determine What Role is Affecting a User

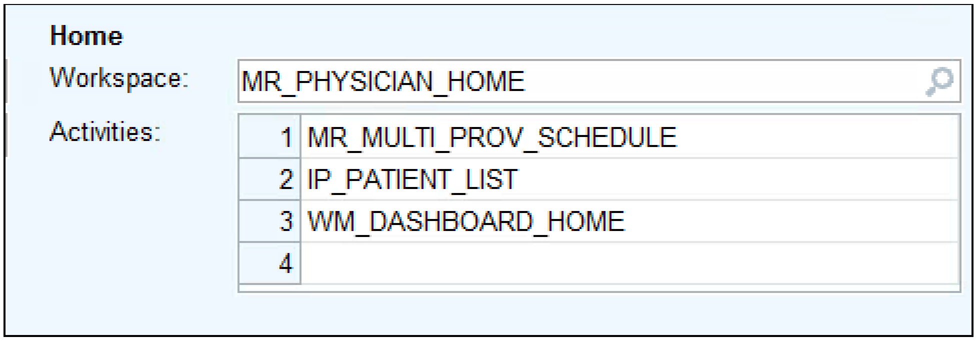
When you built your pediatrician in an earlier chapter, you established many important settings using a template linked to their user record. You can identify the specific role record that is affecting a user on the User Role form of the User Record Editor (EMP).

1. Log in to Hyperspace as a builder.
2. Open your Andy pediatrician's user record, and accept the most recent contact.
3. Go to the **User Roles** form, and write down Andy's default user role record.
4. Click **Finish** to close the user record.

Exercise 2: Change a User's Startup Activities and Update the Maximum Number of Workspaces

The pediatricians have noticed that there is both an In Basket startup activity and an In Basket button on the Hyperspace toolbar, so you will remove the In Basket startup activity.

1. From your dashboard, click **Role Editor (E2R).**
2. Open the role record you wrote down in the previous exercise. It should be a TRNCLN## Pediatrician Role.
3. Remove IB_MAIN from the list of startup activities in Andy's role record.



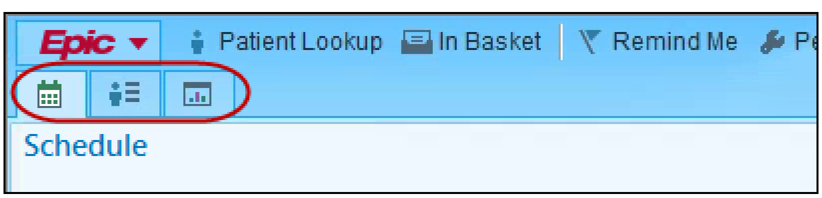
A user's role record can limit the number of workspace tabs that can be open at once. Note that the system counts all of the startup activities (such as our Dashboard, In Basket, and Patient Lists) as a single workspace.

To encourage providers to close patient charts when they are not actively documenting, and to prevent accidental documentation, your organization has decided to allow the pediatricians to open 3 patient workspaces in addition to their startup activities.

4. To set the maximum total number of workspaces, enter a value of 4 in the **Maximum workspaces** field at the bottom left of the role record.
5. You're done editing this role record. Click **Finish** to save and close the record.
6. Log out.
7. Exit Hyperspace.

Test Your Work

1. Relaunch Hyperspace and log back in as your Andy pediatrician.
   - Note: Laura could also log in to test this change, since she is also assigned the role you just edited in the linkable template she shares with Andy.
2. Confirm that In Basket is NOT one of your startup activity tabs.



3. Open several charts from your schedule. You should see a pop-up when you try to open a fourth patient workspace, because you determined that these users could only have three open at a time in addition to their startup activities.
4. Log out.

More About Role Records

The following information about multiple roles and changing a user's role based on login department is "beyond the basics." It isn't required for certification.

Multiple Roles

The **Default User Role** field allows you to list more than one role record. The first role listed controls your Startup Activity, your timeout limit, and the maximum number of workspaces. Additional roles are used to provide additional configuration to a user's toolbars and menus that aren't included in the primary role.

Epic generally recommends against doing this, but there are some situations where it's useful. Talk to your Epic representative for more information.

Change a User's Role Based on Login Department

The **User Role Override** section of the User Role form can be used to assign different roles to a user based on the department chosen at login. This can be useful for users who have different jobs in different departments (like a unit clerk who sometimes works as a medical assistant). It is also a useful option for residents, because they spend time in different clinical environments as part of their training. When a user chooses a login department listed on the table, the associated role is used instead of the default role.

Reviewing the Chapter

Review Questions

1. What function does the role record perform in Epic?
   A ROLE RECORD DETERMINES THE LAYOUT AND GROUND RULES OF HYPERSPACE.
2. Name two things that are defined by your role record.
   ROLES DEFINE YOUR DEFAULT STARTUP ACTIVITY, THE HYPERSPACE TOOLBAR, OPTIONS UNDER THE EPIC BUTTON, THE MAXIMUM NUMBER OF WORKSPACES A USER CAN HAVE OPEN, AUTOMATIC TIMEOUT SETTINGS, AND WHETHER YOUR USER'S LAST LOGIN DEPARTMENT WILL DEFAULT THE NEXT TIME SHE LOGS IN.
3. Explain the difference between role and security.
   SECURITY DETERMINES A USER'S ACCESS TO FUNCTIONALITY. ROLE DETERMINES WHERE THE USER GOES IN HYPERSPACE TO ACCESS THAT FUNCTIONALITY.

Review Key

1. What function does the role record perform in Epic?
   A ROLE RECORD DETERMINES THE LAYOUT AND GROUND RULES OF HYPERSPACE.
2. Name two things that are defined by your role record.
   ROLES DEFINE YOUR DEFAULT STARTUP ACTIVITY, THE HYPERSPACE TOOLBAR, OPTIONS UNDER THE EPIC BUTTON, THE MAXIMUM NUMBER OF WORKSPACES A USER CAN HAVE OPEN, AUTOMATIC TIMEOUT SETTINGS, AND WHETHER YOUR USER'S LAST LOGIN DEPARTMENT WILL DEFAULT THE NEXT TIME SHE LOGS IN.
3. Explain the difference between role and security.
   SECURITY DETERMINES A USER'S ACCESS TO FUNCTIONALITY. ROLE DETERMINES WHERE THE USER GOES IN HYPERSPACE TO ACCESS THAT FUNCTIONALITY.

Study Checklist

Make sure you can define the following key terms:

- ☐ Role
- ☐ Descriptor
- ☐ Startup activity

Make sure you can perform the following tasks:

- ☐ Point out elements of Hyperspace that are controlled by a role

Make sure you fully understand and can explain the following concepts:

- ☐ The effect a user's role has on Hyperspace
- ☐ The difference between what security impacts and what a role impacts

Lesson 10: Homework: Configuring the Epic End User Lab

Homework: Configuring the Epic End User Lab

Homework: Configuring the Epic End User Lab

In this lab, you'll analyze a clinical staffing scenario and build the components necessary to satisfy it. You're given specific requirements to meet, and you'll synthesize information from this class in order to meet those requirements.

You will use analysis questions and a record tracker to help you plan your build and monitor your progress. Answer keys and explanations are included in the version of this training companion on Galaxy.

Warm-Up

Refresh your memory on the uses of different master files we have seen in class.

Exercise 1: Determine Which Records are Needed

Answer the following multiple choice questions.

1. Dr. Scan does not have an Imaging tab in the Chart Review activity and requests this tab be added. To modify the Chart Review tabs that appear for Dr. Scan, an administrator would change a(n) ______________.
   a. profile record
   b. user record
   c. role record
   d. security class record
      - Your answer: __A__
2. When Dr. Hart writes notes in Hyperspace, her name should appear as the author followed by the letters "MD". What record(s) is/are necessary for her to be able to log in to Hyperspace and for her name and credentials to appear on notes?
   a. Provider only
   b. User only
   c. Both provider and user
      - Your answer: __C__
3. Nurse Denver and Nurse Apple work in the Emergency Department. Both have access to the same activities. When Nurse Denver logs in, the first screen she sees is the ED Manager, while Nurse Apple's first screen is the ED Track Board. This is because they have different ______________.
   a. security classes
   b. roles
   c. profiles
      - Your answer: __B__
4. Dr. Cloud is a new physician who will be seeing patients in a clinic and a hospital. Which types of security will Dr. Cloud need to have access to the proper functionality for his work? Choose all answers that apply.
   a. EpicCare
   b. Reporting Workbench
   c. In Basket

d. Shared

e. Inpatient

- Your answer: _ALL_

Exercise 2: More Practice with Security, Role, and Profile

1. In the following table, fill in the blank cells with the appropriate words from these selections:

Details	Layout	What am I allowed to do?	How do I get to activities?

Master File	Keyword/Description:	If thought of as a question, it's like the user asking...
Security Class	Access	WHAT AM I ALLOWED TO DO?
Role	LAYOUT	HOW DO I GET TO ACTIVITIES?
Profile	DETAILS	Now that I'm in an activity, what's it like?

2. In which order does the system look to determine a user's compiled profile at login?

a. EpicCare Security Class > User Template > Location > Service Area > Department

b. User Template > Department > EpicCare Security Class > Location > Service > System

c. System > Service Area > Location > Department > EpicCare Security Class > User Template

d. User Template > EpicCare Security Class > Department > Location > Service Area > System

- Your answer: __D__

Exercise 3: Troubleshooting Record Build

Complete this exercise to familiarize yourself with troubleshooting tools. In addition to a review of tools and master files you should already know, this exercise introduces a new search tool called Screen Fast Forward. You may find Screen Fast Forward very helpful when you begin building in the system.

The Story of Your Issue

Getting Started:

Read the following story. As you come to each question, choose all the answers that apply. You do not need to access the system in order to complete this exercise.

The Story:

A user comes to you with a complaint about the patient header she sees in patient workspaces. You get a little anxious because that wasn't a setting you learned about in CLN251/252...or was it? You can't remember exactly, but you can remember some basic principles and tools for sorting out role, security and profile settings.

First you ask yourself, "Is that a role setting?" You go there first because you know roles are limited to a few things. You quickly rattle off everything drilled during class about what roles control.

1. What do user roles control? Choose all answers that apply.
   a. Startup activities
   b. Chart Review tabs
   c. Hyperspace toolbar
   d. Maximum number of workspaces
      - Your answer: _A,C,D_

You conclude that roles don't control the patient header.

It doesn't seem like a security-related issue, but just to be sure, you decide to open the Security Point Dictionary.

2. Where can you download the Security Point Dictionary?
   a. Galaxy
   b. WeLearning
   c. CNN
   d. Nova
      - Your answer: __A__

After you download this tool, you search for any security points related to patient headers, but find nothing.

This all seems to confirm what you'd already suspected.

3. ____________ control the options *within* activities.
   a. Profiles
   b. Roles
   c. Security
      - Your answer: __A__

But just to be sure, you go to the source of all things profile: the Profiles Setup and Support Guide. After researching in the guide, you realize that the patient header is a report, and reports are definitely defined within a profile. Therefore, profiles *do* control patient headers. After doing more research, you discover that the specific item the user contacted you about is "Workspace header (LRP)."

So, which profile is set up with the wrong value for that item? You decide to use a report to find out.

4. Which report do you use to find out which profiles are contributing to a user's compiled profile?
   a. About Hyperspace
   b. Session Information Report
   c. Report Assistant
      - Your answer: __B__

Once you use this report to record the profiles in use, you use Record Viewer to pinpoint the exact profile. In this case, it's a department-level profile.

You ask around the department. This header problem is present department-wide. If you could edit the record in Record Viewer, you would, but you know you'll have to go elsewhere.

5. Where will you go to edit the department-level profile?
   a. Text
   b. Hyperspace
      - Your answer: __A__

You open the profile record, and are greeted by a menu. You look over the options, but don't find any with "patient header" in its name. You think, "Even if I select the correct option, there are dozens of screens. It could take me a very long time to find this one item.

6. How long would it take to find a specific item you've never worked with before in a profile if you viewed all the screens in a profile?
   a. An hour
   b. All day
   c. A millennium
      - Your answer: __C__

You know you're probably being a little dramatic, but you've had some experiences in the past where you were looking for settings and paged down past your target without realizing it. After running a couple laps through a record looking for an item, it can get a bit frustrating.

You must be visibly distressed because a coworker stops to ask if you're feeling alright. You explain the predicament and she just laughs.

7. What does your coworker say is the solution to your problem?

a. Use Screen Fast Forward!

b. Let's go to yoga!

c. I still have my Epic chocolates! You can have one.

- Your answer: __A__

Explore with Screen Fast Forward (Home+F9)

Screen Fast Forward makes it much easier to find items in any record in text (not just profiles).

Screen Fast Forward quickly scrolls through a record in search of items or screens based on their number or name. However, because it's a "downward" search, you'll always get the most comprehensive results by starting at the "top" of a record (in the case of profiles that means selecting "All Screens" at the profile menu).

1. Follow this path in text: **Clinical Administration** > **Management Options** > **Profiles**
2. Open your **TRNCLN## Pediatric Department Profile** (984003##).
3. At the profile menu, select **All Screens** (option 1).
4. On the first screen, press and release **HOME**, then press **F9**.
   - A question appears at the bottom of the screen:

```
Fast forward to (S)creen number, or screen with (T)ext label or (I)tem?
```

5. To indicate that you would like to search by text, type "t" and press **ENTER**.
6. You want to search for an item that has the word "header" in it, so at the **Enter search text** prompt, type "header" and press **ENTER**.
   - Did you "fast forward" to the **Patient Workspace Settings** screen? Yes!

Important Considerations and More Practice

Screen Fast Forward only searches "down" a record. It doesn't search the screen that you are on or any preceding screens. Therefore, searching from the beginning of a record is the most comprehensive approach.

If Screen Fast Forward doesn't find a match in a profile record, you are taken back to the profile menu. In records without menus (for example, a provider record), when no match is found, the record closes and you are taken to the master file prompt.

In some cases, your search text may be applicable to more than one screen. Screen Fast Forward will take you to the first match in the record, but you can use **HOME+F9** again to keep searching through the record.

For practice, use Screen Fast Forward to find as many of the profile items listed in the following table as you can. Check them off in the "Found it?" column as you find them.

Setting	Found it?
Height Display By Age	
Available Reports	
Doc Flowsheet report	
Frequency of reminders	
Level of service form	
Use Bulk Communication	
SmartSet preview report	
Lab result based suggestions	
Maximum number of progress notes	

Conclusion

You now know the basics of using Screen Fast Forward. As you continue to practice, it can be a helpful tool when locating unfamiliar settings. Additionally, as you become familiar with certain items (to the point of memorizing item names), you'll find that using Screen Fast Forward is much faster than paging down numerous times to the desired screen. Try using Screen Fast Forward in your upcoming build when you are navigating larger records in text.

Lab Build

Background

You are an application coordinator with a focus on Epic security management for an organization called Voyager Health. You work closely with the various application teams to configure users to be able to efficiently do their jobs.

Voyager Health had their first go-live in a few ambulatory clinics. So far, several family medicine departments and several prenatal departments have gone live.

Voyager Health has one hospital, and it also has gone live. This hospital has computerized physician order entry (CPOE) and nurses are doing full documentation.

! **IMPORTANT NOTE**: Do not modify any record that you did not create. This could affect others who are working on the lab. You can (and are encouraged) to use Foundation System records when appropriate. However, if the scenario calls for something different from the Foundation System record, please duplicate or recreate the Foundation System record.

Scenario

You have just learned that a new group of residents will begin rotating through your clinics starting this summer. You have been assigned as the point person to configure access for one of the residents.

Lab Build Analysis

Now you will practice analyzing some of the setup requested for your new resident. Read each build requirement in the tables below. In the Master File/Record column, note in which master file(s) you need to build to satisfy the requirement. There is also space to jot down any notes about the scenario. Use the tables as a helpful resource and review when you begin the lab.

Exercise 4: Analyze Build Requirements for a Resident

	Requirement	Master File/Record
1	Needs to log in to Hyperspace	USER
2	Needs access to In Basket, Reporting Workbench, and shared utilities	SECURITY CLASS (TYPE = IN BASKET, SHARED, AND REPORTING WORKBENCH)
3	Should NOT be the authorizing provider for medication orders or procedure orders	PROVIDER
4	Should be set up to be designated as an ordering provider in the hospital	PROVIDER
5	When marking the navigator sections as reviewed, the resident's name should be followed by "MD."	PROVIDER
6	In most circumstances, Schedule and Patient Lists should be readily available upon logging in.	ROLE
7	The resident will spend a few weeks in the ED. When she chooses a login department of EMH Emergency Department, she should have the ED Track Board as her startup activity.	ROLE SPECIFIED PER DEPARTMENT IN THE USER RECORD
8	The residents should not be able to close a visit (essentially say that the visit is legally complete and should be sent to billing) without a cosign. The residents have not obtained a license from the state to prescribe medications and are operating under a training license issued to the hospital. Thus, any prescription order needs a cosign.	SECURITY CLASS (TYPE = EPICCARE)
9	For their Inpatient-based work, the residents' notes require a cosign. They should not be able to edit their own Order Sets.	SECURITY CLASS (TYPE =

	Requirement	Master File/Record
		INPATIENT)
10	Your resident needs access to emergency department functionality.	SECURITY CLASS (TYPE = ASAP)
11	When residents access the SnapShot activity or the Summary activity, they should have a report available that consolidates all obstetric-related information onto one page. It should appear to users as <your initials> OB Info.	REPORT (LINKED TO PROFILE)
12	In addition, these existing reports should always be available from the SnapShot or Summary: • 18054-PATIENT SNAPSHOT (HTML/CSS) • 75050-ED ENCOUNTER SUMMARY (PATIENT SUMMARY) The residents will also find it helpful to have two shortcut buttons to the following reports: • 18054-PATIENT SNAPSHOT (HTML/CSS) • <your initials> OB Info	PROFILE
13	When they open encounters with patients, the residents need the option to choose an encounter type of Appointment, Office Visit, Initial Prenatal, and Routine Prenatal. Hint: Available encounter types are normally set at the system level, but certain specialties might need to be given a different combination of encounter types at a more specific level.	PROFILE
14	The residents spend a few weeks reading diagnostic images (x-rays). When they choose a login department of EMH X-Ray Imaging, they should have the Reading Work List in their startup activity. They need general procedural access.	ROLE FOR THE FIRST PART; SECURITY CLASS FOR THE SECOND
15	The residents will have clinic visits of the encounter type "Routine Prenatal." The following standard Visit Navigator template should appear:	WORKFLOW ENGINE RULE LINKED TO A

	Requirement	Master File/Record
	• T_MODEL_OB_CHARTING_RPV_MD HINT: This will require building a Workflow Engine rule	PROFILE
16	When seeing a patient in a clinic with an encounter type of "Initial Prenatal," the resident should see the following Visit Navigator sections. • SEC_EPISODES • SEC_OB_PROVIDERS • SEC_CC • and many more HINT: This will require building a Workflow Engine rule and a navigator.	NAVIGATOR LINKED TO A WORKFLOW ENGINE RULE LINKED TO A PROFILE
17	When seeing any patient in this clinic with an encounter type of "Office Visit" the following standard Visit Navigator Template should appear: • T_MODEL_MR_PROVIDER_OFFICE_VISIT HINT: This will require building a Workflow Engine rule.	WORKFLOW ENGINE RULE LINKED TO A PROFILE

Build Details

After your preliminary analysis, it is time to plan the build. Follow steps according to how you learn best. For example, if you are a big picture person, you may begin by creating a diagram of the various master files so you can see how everything fits together. If you like to dig into the details, you may identify pieces of the scenario above that you feel you can build and then slowly put it all together.

Order of Build

The sections that follow provide a suggested order in which to complete your build. Each section begins with an overview of exactly what record you will build to meet certain requirements of the scenario. This quick overview serves two purposes: to help you contextualize exactly what you will do in each part of the build and also to give you a guide if you would like to challenge yourself to build without using the step-by-step instructions that follow.

You will see some settings and aspects of build that you have not seen earlier in class. These new settings will expand your knowledge of the records you have covered in class and what they can control.

Following the overview, each section includes steps that provide a high-level description of what to do. If you'd like to refer to the companion for detailed steps as you progress through your build, please do so.

You'll find several review questions along the way which test your understanding of the records you have covered so far. If you have difficulty answering those questions, take time to revisit the appropriate chapters in the companion. Answers can be found in this companion on Galaxy.

Lab Record Tracker

Take this worksheet out of your companion before you start the build portion of the lab. Fill in the IDs on the table as you go to keep track of the records you are creating and editing.

Master File	Record	Name	ID
Report (LRP)	Report	<your initials> OB Info	
Navigator (LVN)	Navigator Template	<your initials> T OB Initial Visit Res	(Auto-generated)
Navigator (LVN)	Navigator Topic	<your initials> Topic OB Initial Visit Res	(Auto-generated)
Workflow Engine Rule (LOR)	Workflow Engine Rule	<your initials> Resident Encounter Rule	
Profile (LPR)	Profile to attach at the User Template Level	<your initials> Resident	
Security (ECL)	Inpatient Security Class	<your initials> IP Resident	
Security (ECL)	EpicCare Security Class	<your initials> EpicCare Resident	
Provider (SER)	Provider	<your last name>, Anna	
User (EMP)	User Template	<your initials> Resident	
User (EMP)	User	<your last name>, Anna	

Exercise 5: Report Build - OB-Related Reports

According to the notes on the preceding pages, we want our users to be able to view a consolidated report showing OB history information relevant to a pregnant patient. This build will be useful for our residents because they won't have to sort through Chart Review to find the most important information.

The preliminary step is to find appropriate print groups or, in some cases, to create new print groups. For the purpose of this exercise, you will be given the print group IDs and will not need to create new ones. They are as follows (in order):

- 54071-OB EPISODE SUMMARY HEADER III (RICH TEXT)
- 82009-OB EPISODE PROVIDERS III (RICH TEXT)
- 54025-OB DATING SUMMARY
- 82024-EPISODE-RELATED PROBLEM LIST (EPISODE TIME FRAME)
- 52917-RECENT BP AND WEIGHT (EPISODE CONTEXT)
- 54080-OB MEDICAL HISTORY III (RICH TEXT)
- 54072-OB HISTORY III (RICH TEXT)

What if you hadn't been given the print group names and IDs? You can use the Print Group Search activity on the UserWeb.

While you have not yet built a report from scratch, you will now be able to apply your knowledge of text and report structure to the build of this record.

1. Log in to text as your builder.
2. In **Clinical Administration**, go to **Reports, Print Groups > Reports (LRP)**.
3. Create a new report called <your initials> OB Info. Accept the system assigned ID, and write that ID on your Lab Record Tracker.
4. Fill out these fields on the first page:
   - **Default display name**: <your initials> OB Info
   - **Report type**:
     - Patient Summary
     - Patient Snapshot

- Inpatient Summary Report

Because you gave this report multiple report types, you'll be able to see the report in multiple activities.

5. Page down four times to a screen called **Report Definition**. Enter the following information:
   - **Use Stylesheet**: Standard 12pt
6. Arrow down to **Report Print Groups (Rich Text) Column 1**. Enter the print groups specified in the scenario box at the beginning of this exercise.
   - If you receive a warning that a print group has a potential style problem, ignore it by hitting **ENTER**.
7. When you have added the appropriate print groups to your report, close the record.

Exercise 6: Navigator Build - OB-Related Navigator (Prenatal)

Residents should view a specialized navigator for an Initial Prenatal Visit. The existing navigator is optimized for Obstetricians. For residents, we want to display only the sections pertinent to their brief rotation.

Similar to working with reports and print groups, the first step is to discover which sections are available. You can search Galaxy to find out more about the many available sections. For this exercise, your navigator will include the following sections:

- SEC_EPISODES
- SEC_OB_PROVIDERS
- SEC_CC
- SEC_OB_DATING
- SEC_MR_HISTORY
- SEC_MR_OB_PRENATAL_PHYSICAL
- SEC_OB_ULTRASOUNDS
- SEC_PROBLIST
- SEC_OB_EPI_PROGRESS_NOTES
- SEC_PT_INSTR_RTF
- SEC_CLOSE_VISIT

To build your navigator template:

1. Log in to Hyperspace as your builder.
2. Open the **Navigator Template Editor (LVN).**
3. In the Template Select window, select the **Create** tab.
4. Create a new navigator template named <your initials> T OB INITIAL VISIT RES
   - A system ID is automatically assigned for this record. Use your Lab Record Tracker as a reminder of the naming convention you used for your template.
5. To the right of the **Search for a topic** field, click **Add**.
6. On the **Create** tab, enter the following:
   - **Name**: <your initials>_TOPIC_OB_INITIAL_VISIT_RES
   - **Record type**: Topic
7. Click **Accept**.
   - A system ID is automatically assigned for this record. Use your Lab Record Tracker as a reminder of the naming convention you used for your topic.
8. Enter a **Caption**: <your initials> Initial OB.
9. **Accept** your topic.
10. In the **Search for a section** field, add the navigator sections specified in the scenario box at the beginning of this exercise.
11. Click **Accept** to save your template.

Exercise 7: Workflow Engine Rule Build

You have just created a navigator for OB initial visits. Our residents would also like to see specific navigators for routine prenatal visits and office visits (those navigators already exist in the system). To set up these navigators to display in the correct context, you need to build a Workflow Engine rule.

You want to configure this rule to display:

- Your new navigator for patient encounter types of OB initial prenatal visits
- An obstetrics charting navigator for routine prenatal visits
- A standard office visit navigator for office visits

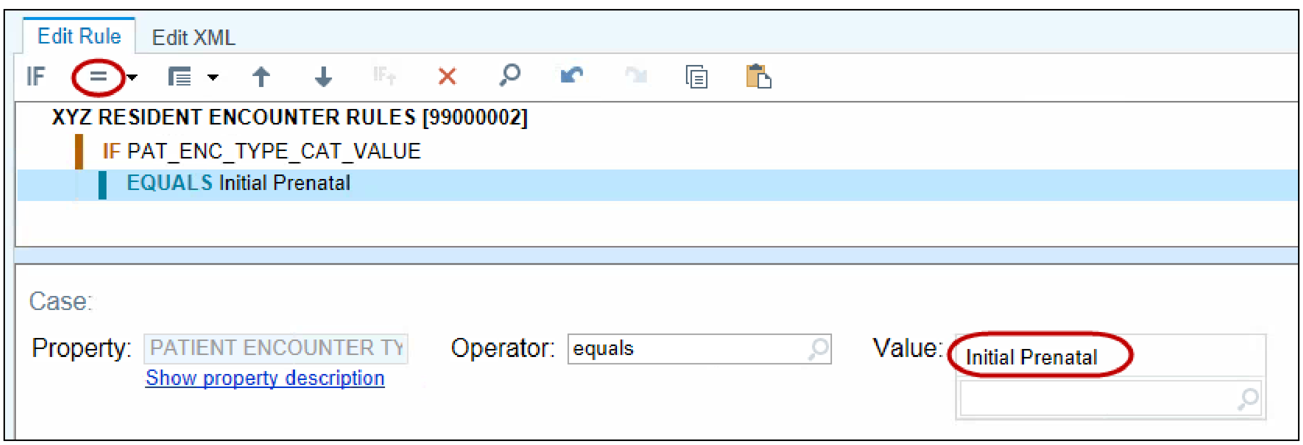
To build a Workflow Engine rule:

1. Log in to Hyperspace as a builder.
2. Open **Workflow Engine Rules (LOR).**

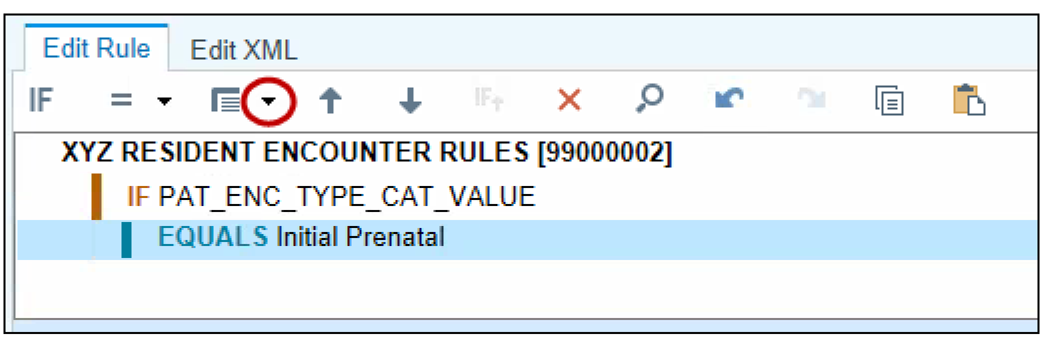
3. Create a new rule:
   - Name: <your initials> Resident Encounter Rule
   - Accept the initial Contact Comment.
4. Once you've opened the workbench, write down the ID of the rule you've created in your Lab Record Tracker.
   - The ID can be found in the top left of the workspace, next to the name of the rule.

In a Workflow Engine Rule, what is the relationship between conditions and directives? CONDITIONS ARE "IF..." STATEMENTS THAT EVALUATE PROPERTIES. IF THE SYSTEM MATCHES ON PROPERTIES FOR A CONDITION, DIRECTIVES, OR "THEN..." STATEMENTS, ARE CARRIED OUT.

5. On the Edit Rules tab, click the "IF" button to write your first condition.
6. In the **Property** field at the bottom of the screen, enter PATIENT ENCOUNTER TYPE (CATEGORY VALUE) [1023].
7. From the toolbar, click the equal sign button (=).
8. In the **Value** field, use completion matching to search for "Initial Prenatal" and press **TAB** to add it.



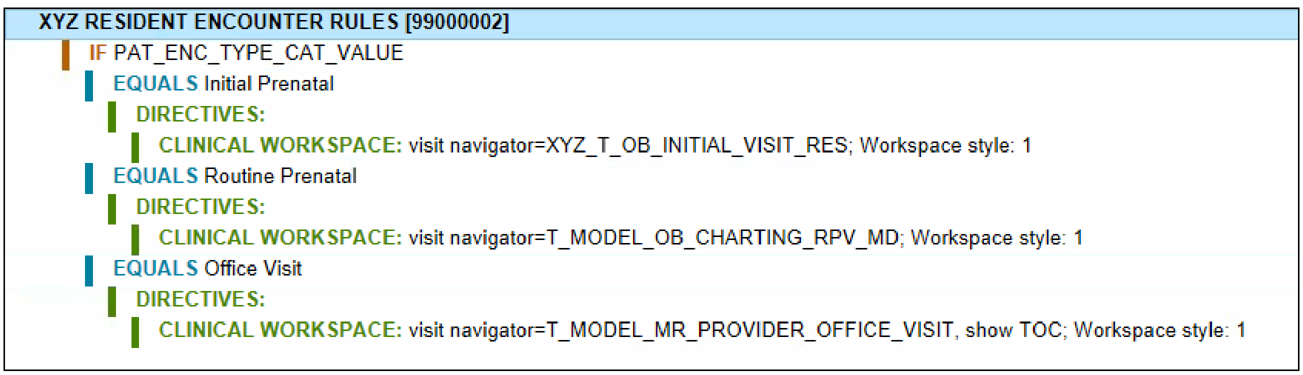
9. Click the dropdown arrow next to the Add Directives block button and select **Set Toolset**.



10. In the **Template Override** field at the bottom of the screen, enter the following:

- <your initials> T OB INITIAL VISIT RES

11. Next, click on the row that says if PAT_ENC_TYPE_CAT_VALUE.
12. Click the equal sign button (=) and in the **Value** field, enter Routine Prenatal.
13. Click the dropdown arrow next to the Add Directives block button and select **Set Toolset**.
14. In the **Template Override** field, enter T_MODEL_OB_CHARTING_RPV_MD (1020001300).
15. Click on the row that says if PAT_ENC_TYPE_CAT_VALUE.
16. One more time, click the equal sign button (=) and in the Value field, enter Office Visit.
17. Click the dropdown arrow next to the Add Directives block button and select **Set Toolset**.
18. In the **Template Override** field, enter T_MODEL_MR_PROVIDER_OFFICE_VISIT (2010300).
19. Click **Compile**.
    - Confirm that you would like to compile. Any problems with the rule will appear in the right side of the screen. Click any validation errors that appear to jump to the part of the rule you need to fix.
    - Refer to the following screen shot to ensure your rule is correct.



20. Finally, click **Activate** at the top of the screen.
    - Confirm you would like to activate this record.
21. Exit your record. If prompted to save, click **Yes**.

Exercise 8: Profile Build - Available Reports

So far, you have created an OB-specific report. This record is in the system, but at this point, no user can see it. In order for your report to appear to users in Hyperspace, it must be linked to a profile.

You will build a new profile that makes your new report available. Recall from the scenario that we also want your resident to have the following reports (also controlled with profile settings) available in Summary or SnapShot:

- 18054-PATIENT SNAPSHOT (with a shortcut button to this report and the OB report you created available on their activity toolbar)
- 75050-ED ENCOUNTER SUMMARY (PATIENT SUMMARY)

To build a profile:

1. Log in to text and go to **Clinical Administration > Management Options > Profiles (LPR**).
2. Create a new profile called <your initials> Resident.
3. Enter an ID number and write that number down on your Lab Record Tracker.
4. To link the report to your profile, choose **Chart Review, Summary Report**.
5. Page down until you reach the **SnapShot** screen (or use Screen Fast Forward to search the text "SnapShot").
6. In the **SnapShot default report** field enter Patient SnapShot (HTML/CSS) [18054].
7. At the **Available Reports** field enter the following reports (search with either the name or ID):
   - <your initials> OB Info
   - 18054-PATIENT SNAPSHOT (HTML/CSS)
   - 75050-ED ENCOUNTER SUMMARY (PATIENT SUMMARY)
8. To make some of your reports available via buttons, under **Startup Buttons** enter:
   - <your initials> OB Info
   - 18054-PATIENT SNAPSHOT (HTML/CSS)
9. **SHIFT+F7** once to return to the profile main menu.

Check Your Understanding

You just built a profile record and set up some reports for your resident. Check your understanding:

Is this profile affecting your resident? Why or why not?
NO, IT IS NOT; THE PROFILE MUST BE ATTACHED TO A LEVEL IN THE HIERARCHY THAT WOULD AFFECT YOUR RESIDENT.

Exercise 9: Profile Build - Workflow Engine Rule

Along with your report, you have also created a workflow engine rule. Linking this rule to your profile will allow your resident to see the appropriate navigators.

To link the Workflow Engine rule to your profile:

1. Verify that you're still in your profile record in text.
2. Choose **Hyperspace, In Basket**.
3. **PAGE DOWN** to the **Patient Workspace Settings** screen. In the **Workflow Engine rule** field, enter <your initials> Resident Encounter Rule.
4. **SHIFT+F7** to return to the profile main menu.

Exercise 10: Profile Build - Available Ambulatory Encounter Types

Encounter types are among hundreds of different details controlled by profile records. Most encounter types (such as Office Visit, Nurse Only Visit, etc.) are universal, so available encounter types are normally configured in a profile at the System Definitions level. In certain cases, a specialty might use encounter types that few others use (for example, only OB uses initial and routine prenatal visits).

You will set available encounter types on the Ambulatory Encounter Types screen of your residents' profile.

1. From the profile main menu, choose **Encounter, Episode**.
2. You will be taken to the Ambulatory Encounter Types screen. At the **Exam & charting encounter types** field, enter Appointment, Office Visit, Initial Prenatal and Routine Prenatal. Compare your work to the screen shot below.

```
Profile Name                                                    Profile ID
XYZ RESIDENT (<no type set: partial by default>)                    444455
                        Ambulatory Encounter Types

  Exam & charting encounter types....:  1. Appointment
                                        2. Office Visit
                                        3. Initial Prenatal
                                        4. Routine Prenatal
```

3. Press **SHIFT+F7** twice to close your profile record.

Exercise 11: Security Class Build - Inpatient Security

Based on the requirements above and the records available, the residents should have the same security as the TRNCLN PEDS IP SECURITY CLASS security class, except that their Inpatient class should have security point 28 (Notes Cosign Required) and should not have security point 193 (Edit My Order Sets).

The easiest way to achieve this is to duplicate the TRNCLN PEDS IP SECURITY CLASS security class and modify the security points. For more information on duplicating security classes, refer to the Security chapter of this companion.

Only one person can duplicate a shared record at any time. If you attempt to duplicate a record in text and are notified that someone else is accessing that record, wait a couple of minutes and then try again.

To create a copy of a security class and edit it:

1. Log in to text as your builder.
2. From the **Training Application Access** menu, select **Chronicles**.
   - Hint: The **Training Application Access** menu is the initial menu after logging in to text. If you are in text but not on this screen, press **PAGE UP** until you reach this screen.
3. Enter "ECL" at the **Database initials** prompt.
4. Enter through the quote of the day.
5. Go to **Enter Data** > **Duplicate Security Class**.
6. Duplicate the "TRNCLN PEDS IP SECURITY CLASS" [98400204] security class.
   - Enter a new ID and write it down on your Lab Record Tracker.
   - Give it a new name of <your initials> IP Resident

7. In Hyperspace, open the **Security Class Editor**.
8. Open <your initials> IP Resident.
9. In the **Comments** field, enter "For first-year residents."
10. In the **Search** field on the **Security Points** tab, enter "notes cosign required" and press **ENTER**.
11. For security point **28 - Notes Cosign Required**, click the button to make the security point active.
12. In the **Search** field on the **Security Points** tab, enter "order sets" and press **ENTER**.
13. In front of security point **193 - Edit My Order Sets**, click the button to make the security point inactive.
14. Click **Accept** to save and close your record.

Exercise 12: Security Class Build - EpicCare Security

Based on the requirements above and the records available, your first-year resident should have the security contained in the TRNCLN## Peds EC Security Class, with a couple of exceptions to require cosigns for the resident when placing various orders or closing encounters. You don't want to build her a new security class from scratch.

The easiest way to achieve the necessary security settings is to duplicate the TRNCLN## Peds EC Security Class and modify its security points. Duplicate this security class and name it <your initials> EpicCare Resident. For more information on duplicating security classes, refer to the security chapter of this companion.

Below are the changes you will need to make:

Security Points to Make Inactive	Security Points to Make Active
4-Rx Non-controlled	36-Rx Non-controlled, cosign reqd
5-RX Cont w/o C-II	37-Rx Cont w/o C-II, cosign reqd
70-Close Exam Encounters	104-Rx Schedule II, cosign reqd
71-Close Other Encounters	72-Close Exam Cosign Required
103-Rx Schedule II	73-Close Other Cosign Required

1. In text, duplicate your TRNCLN Peds EC Security Class. Name the copy <your initials> EpicCare Resident.
2. In Hyperspace as your builder, open **Security Class Editor.**
3. Open the record <your initials> EpicCare Resident.
4. Change the **Comment** field to read "For first-year residents."
5. On the **Security Points** tab, make the following security points inactive to limit the residents' ability to sign for prescriptions and close encounters (these numbers represent the IDs of each point):
   - 4-Rx Non-controlled
   - 5-Rx Cont w/o C-II
   - 70-Close Exam Encounters
   - 71-Close Other Encounters
   - 103-Rx Schedule II
6. Make the following security points active to give your residents the ability to sign for prescriptions and close encounters with a cosign:
   - 36-Rx Non-controlled, cosign reqd
   - 37-Rx Cont w/o C-II, cosign reqd
   - 72-Close Exam Cosign Required
   - 73-Close Other Cosign Required
   - 104-Rx Schedule II, cosign reqd
7. Click **Accept**.

Exercise 13: Provider Build - Anna

The next step is to create a provider record for each individual resident. You'll start with a resident named Anna.

You will set up this provider record so that Anna is required to have an authorizing provider when signing orders, so she can be documented as an ordering provider in the hospital, and so her credentials will display.

Because Anna's provider record is similar to Andy's, you will start by duplicating Andy's provider record.

To create a copy of a provider record and edit it:

1. From the **Training Application Access** menu, go to **Chronicles**.
   - Note: If you are already in Chronicles from the previous exercise, select **Quit Chronicles** in order to choose a new master file.
2. **Database initials**: SER
3. Select **Enter Data**.
4. Select **Duplicate Provider/Resource**.
5. At the **Provider/Resource** prompt, search for your Andy pediatrician.
6. Assign a new ID of your choice and name your record "<your last name>, Anna".
7. When asked if you want to continue, enter Yes.
8. Quit Chronicles.
9. In Clinical Administration, select **Users, Providers > Providers (SER)**
10. Open Anna's provider record and choose the most recent contact.
11. Now it's time to make some updates. Refer to the companion for descriptions of these fields.
    - **Abbreviation**: <your last name>, Anna
    - **External Name**: <your last name>, Anna
    - **Provider Type**: Resident
12. In the **Departments** field, add the following:
    - EMC OBGYN CLINIC
13. **PAGE DOWN** to the Proxy Provider Information screen and update the following information. (If asked about making holidays unavailable, press **ENTER** to accept the default). Refer to the Users and Providers chapter of this companion for descriptions of these fields.
    - **Meds Authorizing Provider?** No
    - **Orders Authorizing Provider?** No
    - **Inpatient Ordering Provider?** Yes
    - **Outpatient Ordering Provider?** Yes

True or False: The Proxy Provider Information screen controls whether your provider is able to sign orders.
FALSE. ACCESS TO SIGNING ORDERS IS CONTROLLED BY SECURITY CLASSES.

14. Optional: **PAGE DOWN** or use Screen Fast Forward to get to the **ED and L&D Settings** page and specify the following setting:
    - **Default treatment relationship**: Resident
    - This setting enables automatic assignment of the treatment team relationship "resident" when users in the ED add your provider to a patient's treatment team.

```
Provider/Resource: SMITH, ANNA - 133
                        ED and L&D Settings

 Default treatment relationship..: Resident
 Default ED provider flag........:
 Complete ED charts automatically:

 Can be supervisor.............?
 Needs supervision.............?

 Departments for L&D metrics...:
```

15. Close the provider record.

Exercise 14: User Build - Anna

Review your understanding of user records and user template records by answering these questions:

Which type of record will enable your resident to log in to Epic?
USER RECORD

Which type of record should you create to give a group of residents the same role, security, and profile settings?
LINKABLE USER TEMPLATE

You will create a template and user record for Anna, your resident. In those records, you will link the profile and security classes you already built, as well as an appropriate role record, Shared, Reporting Workbench, and In Basket security classes, and other application-specific security classes. You will be given Foundation System records to use for the records you did not configure earlier in the exercise.

Build a User Template

1. Logged in to Hyperspace as your builder, click **User (EMP)**.
2. On the User Selection window, select the **Create template record** option.
   - **Template name**: <your initials> Resident
   - **ID**: Enter any number, or click **Auto Generate ID**. Once you've successfully chosen an ID that isn't already in use, record the number on your Lab Record Tracker.
   - Verify **Template Type** is set to **Linkable template**.

- Click **Accept**.

3. On the **Basic Information** form, set the **Status** to Active.

Which three types of security classes does every user need?
SHARED, IN BASKET, AND REPORTING WORKBENCH

4. On the **Hyperspace/Shared Security** form, enter the following:
   - **Security class**: SHARED CLINICAL-LEVEL 4-AMB/IP PROVIDER (400006)
5. On the **In Basket** form, enter the following:
   - **Security class**: CLINICAL USER (2100000001)
6. On the **Reporting Workbench** form (found under the **Cogito** form), enter the following:
   - **Default security class**: RW POWER USER (71040)

Which type of record controls the layout of Hyperspace and determines some ground rules for the behavior of Hyperspace? THE ROLE RECORD (E2R)

7. Most of the time, residents need the Schedule and Patient Lists activities to be readily available when they log in. You will use an existing Foundation System role record to accommodate these needs. On the User Roles form, enter the following:
   - **Default user roles**: MODEL PHYSICIAN (HOME=SCHED/IB/RADAR) (1591700004)
8. Because you want this user to have a different user role when logging into EMH EMERGENCY or EMH X-RAY IMAGING, enter the following in the **User role overrides by department**:

Department	User Role
EMH EMERGENCY	ED PHYSICIAN (1600000003)
EMH X-RAY IMAGING	RIS RADIOLOGIST (1050005)

9. On the Radar form (found under the **Cogito** form), enter the following:
   - **Security class**: RADAR END USER (3303352001)
   - **Default dashboard**: IP/OP Physician Redirector (2100000004)
10. On the **ASAP** form, fill in the following information:
   - **Default security class**: ED PHYSICIAN (1607000100)

Which type of security class does every clinical user need? EPICCARE SECURITY CLASS

Which record can control details within activities, such as the reports or preference lists an end user sees? PROFILE (LPR) RECORD

11. On the **EpicCare** form, enter the following:
    - **Sign-on facility**: Facility 1
    - **User-level Profile**: <your initials> RESIDENT
    - **Default security class**: <your initials> EPICCARE RESIDENT

Which type of security class does every clinical user in a hospital need? INPATIENT SECURITY CLASS

12. On the EpicCare Inpatient form, enter the following:
    - **Default security class**: <your initials> IP RESIDENT
13. Since your residents spend time reading diagnostic images, they will need procedural and Radiant security. On the **Procedural Apps** form, fill in the following information:
    - **Default security class**: RADIANT GENERAL PROCEDURAL RADIOLOGIST RESIDENT (1050010)
14. On the **Cadence** form, enter the following:
    - **Authorized in all service areas?** Yes
    - **Default security class**: ES VIEW ACCESS (900000)

This security class will give your residents access to view the schedule and use some basic Cadence functionality, without giving them the ability to actually schedule appointments.

Why set up the Cadence form?

If your organization is licensed for Epic's Cadence software, the previous setup on the Cadence form is necessary to enable your users to choose an appropriate login department.

15. You're finished building your template record. Click **Finish**.

Build a User Record

1. From the dashboard, click the **User (EMP)** link.
2. On the **User Selection** window, select the **Create single user** option.

- **User name**: <your last name>, Anna
- **ID**: If possible, use the same ID number you used for your provider record. If that ID is taken, click **Auto Generate ID**.
- Write your user ID number down on your Lab Record Tracker.
- Click **Accept**.

> What are some settings that must be made in an individual user record and can't be controlled by a linkable template?
> ID/PASSWORD, DEFAULT LOGIN DEPARTMENT, LINK TO PROVIDER, LINK TO TEMPLATE

3. On the Basic Information form, fill in the following:
   - **Password**: Click **Change** and enter a password of "train".
   - Clear the check box next to the **Expire** field (so that your resident isn't prompted to change her password upon logging in for the first time).
4. On the **Linked Templates** form, fill in the following:
   - **Template**: <your initials> Resident
   - When you move to another form, you will be prompted to save your changes. Click **Save**.
5. Expand the **Hyperspace/Shared** form. Select the **Login Settings** form. Enter the following:
   - **Default login department**: EMC FAMILY MEDICINE (10501101)
6. Expand the **EpicCare** form. On the **Provider/Hot-Keys** form, enter the following:
   - **Link to provider**: the name or ID of Anna's provider (SER) record
7. Congratulations! You've completed the build portion of the exercise. Save and close any open records and move on to test your work!

Test Workflows

After all of that build, it is time to check your understanding by testing your build. In the following sections, you will follow a basic workflow for Anna in order to look for problems and relish your success!

Exercise 15: Test Your Resident

1. At the Hyperspace login screen, enter your resident's user ID and password and press **ENTER**.
2. Confirm the login department is EMC Family Medicine and enter past the department screen.
3. Anna's startup activities are Schedule, Patient Lists, My Dashboards, and In Basket. Startup activities are controlled by the role defined in her user record. (Note that because you just built your resident's record, you won't see any patients listed in the schedule.)
4. To create a new encounter in the EMC OBGYN Clinic, click **Epic** > **Patient Care** > **Encounter**.
5. Search for your Karly patient.
6. Click the **New** button to create a new encounter for Karly.
   - **Type:** Initial Prenatal
   - **Department:** EMC OBGYN CLINIC.
7. Click **Accept**.
8. To verify that your navigator is being used, hold down **CTRL+ALT+SHIFT**, press and release **F12**, then press and release **F10**.
9. Go to SnapShot in **Chart Review**. You should see a button for <your initials> OB Info.
10. In the visit taskbar, click **Add Order.**
11. Type "amox cap 500" and press **ENTER**.
12. Click **Accept** to choose the first amoxicillin cap 500 mg that appears on your Preference List.
13. Click on your order in the shopping cart to open the Order Composer
14. Enter a **Dispense amount** of 30 and verify that the **Class** is Normal.
15. Right-click to close the Order Composer.
16. In the shopping cart, click **Options**, then select **Providers**.
   - Note that Anna requires an authorizing provider for medications (provider record configuration).
   - A cosigner for medications is also required due to security configuration (security point 36-Rx Non-controlled, cosign reqd).
17. Click **Cancel** to exit the Providers window. Remove the order.

So far, you've seen settings from Anna's user record and provider record, the EpicCare security class you assigned her, the Foundation System role, and the profile you built for your resident (all linked in her user template record).

At this point, you may want to do some further documentation and exploration in Karly's encounter.

18. You've finished testing your build for Anna! Don't worry about closing the encounter. Log out.
    - Congratulations! You've completed your build, and your organization's new staff are ready to use the system.

If You Have Time: Test Anna's Role Overrides

1. Log back in to Hyperspace, but change your login department to EMH Emergency.
    - You have a different Startup Activity (the ED Track Board) and different buttons across your toolbar. These settings are coming from the role record you specified in Anna's template for when she logs in to the emergency department.

Exercise 16: Retrace Your Steps

Take some time to fill in the blanks throughout this recap of your lab.

You learned that a new group of residents will begin rotating through your clinics starting this summer. You were assigned as the point person to configure one of the residents. After assessing the needs for this end user, you started building and configuring various records in Hyperspace and text.

Configure Reports

- First, you customized an OB history print group.
- Then, you built an OB-related report for your resident, Anna.
- You built this report in ____CLINICAL ADMINISTRATION____.
- In the report record you gave the report several report types. You also listed out the building blocks of the report, or ____PRINT GROUPS____, which you wanted to be available.
- In order for your report to appear in Hyperspace, you knew you have to link it to a ____PROFILE____ record, which controls details within activities.
- You built that record in ____TEXT____ and within the record you set up the reports you wanted to display in SnapShot.

Configure Access to Activities

- Next, you set up proper access for your end user. As soon as you knew you needed to configure access, you knew you would be working in the ____SECURITY CLASS (ECL)____ master file.
- The records in that master file are groupings of ____SECURITY POINTS____, or individual "keys" to functionality.
- There were some records in existence which were close to what your resident needed, so instead of building from scratch you decided to ____DUPLICATE____those records and modify your copies to set up the proper access.
- Your resident needed several types of ____SECURITY CLASSES____.
- She needed ____INPATIENT____, because she will work in the hospital, as well as ____EPICCARE____, since she is a clinician.
- Additionally, Anna needed the three types of ____SECURITY CLASSES____ that every user should have: ____IN BASKET____, ____SHARED____, and ____REPORTING WORKBENCH____.

Configure Clinical Information

You knew that Anna would be scheduled with patients, that she needed credentials to display in Hyperspace, and that she could be listed as an ordering provider. To accommodate all of these needs, you decided to build Anna a ____PROVIDER____ record in ____TEXT____.

Configure Hyperspace Appearance

Your resident needs certain activities to show up by default when she logs in. She needs to see the appropriate options across her toolbar and under the Epic button as well. Based on this information, you created a ____ROLE____ record for Anna. This record can also set up some ground rules in Hyperspace, including ____AUTOMATIC TIMEOUT____, maximum number of workspaces, and use last login department.

Configure Multiple Users

Once you configured all the pieces, it was time to put everything together. You built a ____LINKABLE TEMPLATE (EMP)____ for your user, which can link to security classes, roles, and ____USER TEMPLATE____ profiles for multiple users. Keep in mind that profiles can be linked at ____FIVE____ other levels besides in this record. Next you built an individual ____USER (EMP)____ which could enable Anna to log in to Hyperspace. A few things can only be set in the individual ____USER____ record and not the ____TEMPLATE____: password/ID, link to provider, login department, and the link to the ____TEMPLATE____ you had just made.

Conclusion

Anna was able to log in to Hyperspace (thanks to her ____USER____ record), see the proper startup activities (thanks to her ____ROLE____ record), and have the proper access to functionality (thanks to ____SECURITY CLASSES____). Additionally, your resident saw the right reports within the activities she was using (thanks to her ____PROFILE____) and was able to be listed as an ordering provider (thanks to her ____PROVIDER____ record). Well done!

Explore Additional Setup

Exercise 17: Change a Report by Configuring a New Print Group

After viewing the report you created, residents request that the OB History III (Rich Text) print group in the report contain information about the patient's past pregnancies including the patient's pregnancy counts with comments related to specific pregnancies as well as general obstetric comments. They would also like the print group to include the name of the end user who last reviewed the patient's obstetric history as well as the date of the last review.

The print group that you originally included meets some of your residents' requests, but not all, so you need to edit it. Because you need to edit the print group, you will start by duplicating the print group and then editing the parameters of your new print group. **You will duplicate a Foundation System OB History print group**.

Duplicate a Print Group

1. Log in to text and go to Clinical Administration.
2. Go to **Reports, Print Groups** > **Dup Print Groups**.
3. Enter OB History III (Rich Text). Hint: You can also search by ID (54072).
   - **New Print Group ID**: 88888## (Write the ID of your print group on your Lab Record Tracker.)
   - **New Name**: <your initials> OB History
4. **PAGE UP** to return to the **Reports, Print Groups** menu.

Edit a Print Group

Your duplicate of the Foundation System OB History print group is currently displaying a patient's previous pregnancy details as your residents requested. However, residents want additional information to display:

- General obstetrics comments
- Information about the user who last reviewed the obstetric history
- The outcome date in the month/date/abbreviated year format

In this section, you'll edit the print group you just created to meet these requests.

1. To edit your newly duplicated print group, select **Print Groups (LPG).**
2. Open <your initials> OB History.
3. On the first screen, observe the following (don't edit these fields):
   - **Style**: Rich Text (should appear by default based on the record you duplicated)
   - **Print Group Type**: Standard
4. On the second screen, observe the **Code to Execute**:

```
d OBhist2b^LARHOB13(ID,"OB History","","","","","1", "","","","","")
```

```
Code Template: OB HISTORY III
Code to Execute [F13]-Extended Entry
d OBhist2b^LARHOB13(ID,"OB History","","","","","1","","3","","","","OB Histor*
```

Parameters

Epic print groups often have what are called "parameters". These are options you can use to modify the print group without writing new code. In the parentheses, in the code to execute of our example print group, there are twelve parameters, each separated by a comma. For example, the second parameter in this print group ("OB History") determines the header of the print group.

5. On the **Print Group Definition 2** screen, use the **DOWN ARROW** to scroll through the Technical Notes, which contains help text and details about the parameters for this print group.
6. To determine which parameters you need to edit to make these changes, you can look at the help text within the print group or at the Data Handbook on Galaxy.

Parameter 7

The seventh parameter determines if the comments section displays. This section displays general obstetric comments that are not associated with any specific pregnancy.

Values:

1	The comments section does not appear.
Null	The comments section appears.

Parameter 8

The eighth parameter determines whether information appears about the user who last reviewed the obstetric history.

Values:

Null ("")	This information does not appear.
1	This information appears. This includes the date and time the obstetric history was marked as reviewed and the user who reviewed it.

Parameter 9

The ninth parameter determines how the outcome date appears.

Values:

Null ("")	The date appears in month/year format. For example, 01/2009.
1	Only the year appears. For example, 2009.
3	The date appears in month/date/abbreviated year format. For example, 01/15/09.

Partial parameter list for our OB History print group from the Data Handbook

Based on what the residents would like included in the print group, we will edit the parameters using the preceding screen shot as a guide.

7. **PAGE DOWN** one time to the Parameters screen.
   - By editing the fields on this screen, the **Code to Execute** on the previous screen will update.
8. On the Parameters screen, change the following parameters:
   - **7. HIDE OB HX COMMENT**: delete "yes"
   - **8. SHOW REVIEWED INFO**: 1
9. **PAGE UP** to the **Print Group Definition 2** screen.
   - Notice the **Code to Execute** has been updated. There is no longer a "1" in the seventh parameter. There is a "1" in the eighth parameter which is related to displaying general obstetrics comments.
10. You're done customizing this print group. Close the record.

Edit Your Report

After duplicating the print group and editing its parameters, you now need to add it to your report.

1. From Clinical Administration, go to **Reports, Print Groups > Reports (LRP)**.
2. Open <your initials> OB Info.
3. **PAGE DOWN** four times to the fourth **Report Definition** screen.
4. Arrow down to **Report Print Groups (Rich Text) Column 1**.

5. In line 7, delete the OB History III (Rich Text) print group.
6. Pull in your new print group by entering <your initials> OB History.
7. You are done editing the report. Close the record.
8. Test your changes by logging in as your resident and viewing the report.

Exercise 18: Additional Scenario

This section offers some opportunities and points of reflection to apply what you learned during the build and re-analyze your steps for greater efficiency or further configuration. This section is optional. It is intended to challenge you to think critically about what you have built and use your knowledge of the system to further configure the records you've built already.

You are encouraged to modify your build to accomplish these new points of configuration. This section contains no step-by-step instructions. Refer to your companion and the records you built as part of this exercise for guidance.

1. Voyager Health has 20 more first-year residents who will join the organization soon. They will also be using your security class for residents. However, while building the records for these new users, you realize that there is an inefficiency in their compiled profile setup and it actually makes more sense to attach your profile to a different level in the profile hierarchy (for Anna, we linked it to her user template record). What level in the hierarchy would be more efficient for your profile to be linked? To which specific record would you link your resident profile?
2. How will Anna's system configuration need to change if she stays at Voyager Health after her residency is complete? What changes will you make in her provider record? How about her user record? How might her compiled profile need to change? Will you need to build new security classes, or do you already know of some Foundation System classes that could accomplish her needs as an attending provider?
3. Voyager Health has 20 more first-year residents who will join the organization soon. After the successful build you accomplished with Anna, your organization has decided to utilize your profile to give these new residents the same reports and Workflow Engine rule for navigator display that she had. Where would it make sense to attach this profile?
4. Voyager Health would also like residents to see a pediatric-specific navigator built in the Foundation System (T_MODEL_MR_MD_PEDS_VISIT) for office visits with patients less than 17 years of age. How many records will you need to modify to accommodate this request? How many new condition/directive statements will you need to write?
5. Would the Workflow Engine rule you built still be appropriate?

Lesson 11: Homework: Category Lists

Homework: Category Lists

Homework: Category Lists

You're familiar now with Chronicles and how data is stored in master files and records. You're also familiar with the idea of items and values. For example, all patient records have an item called Marital Status. If a patient has "Married" as the value for the item, how did that value of Married get there? It was selected from a list, specifically a category list.

A category list is a defined set of possible values for a particular item. With the example of Marital Status, the category list contains choices like Married, Divorced, and Widowed. This chapter will guide you in understanding how certain items are configured to use category lists.

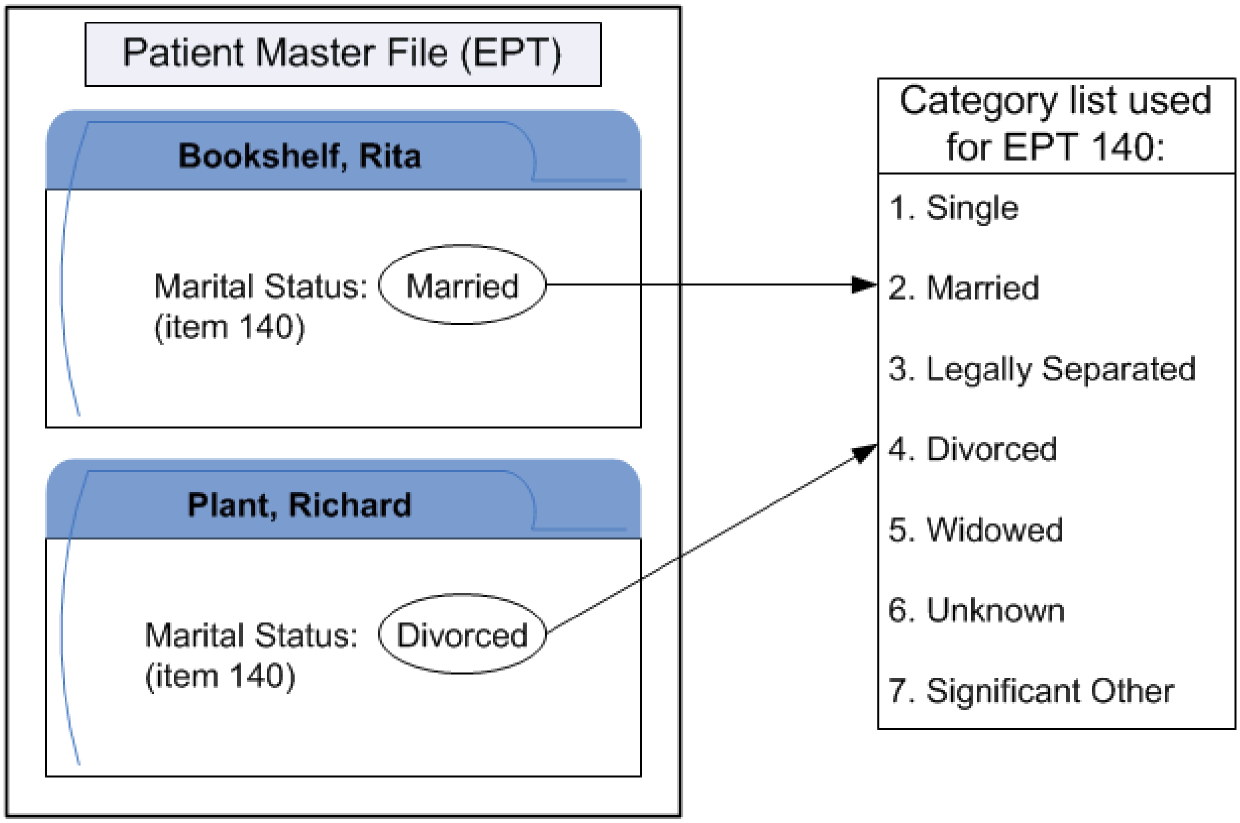
Category lists are used in the system for these purposes:

- Standardization of responses for reporting
- Speed: Typing time is reduced since you can select from category lists by completion matching
- Triggering other functionality in the system (for selected values)

> ! Before you begin reading through this lesson, complete the e-learning GEN605: Category Lists and its corresponding workbook. You can access this lesson and its workbook from the UserWeb and on the course catalog for the CLN251/252 class. This chapter is designed to serve as an additional reference and practice tool to supplement the information covered in the e-learning. **You will revisit category list build and vocabulary in later administrative classes at Epic, so you should complete this chapter before attending those classes. You will be tested on Category Lists on your CLN251/252 exam.**

The Big Picture

A category list is described by the master file initials and the item number that use it (like EPT 140).



Types of Category Lists

System (Uneditable)

Some category lists are entirely controlled by Epic. In these cases, configuration in the software is driven by the values on that category list. The allergy severity category list is one example. As you know, the patient header can list a patient's allergies, and the listing is in order of severity from high to low. To make sure that the configuration continues to work properly, this list is not editable by customer organizations.

When working in the Category List Maintenance activity, you know a category list is uneditable when you see "Release Range: All Categories" under the list name.

Extendible

Some category lists are partially controlled by Epic, meaning certain values on the list are uneditable. The Epic-reserved values on these category lists are used by configuration elsewhere in the system. For example, the sex category list has three values controlled by Epic. Administrators can add and edit other values on the list, but cannot touch values 1, 2, or 3.

When working in the Category List Maintenance activity, you will know that a list is an extendible list when you see a message like "Release Range: From 1 to 3". If you attempt to edit a reserved value, you will see a message like "ID 2 is within the Epic Release Range and cannot be edited".

Customer

Customer category lists are entirely controlled by the customer organization. Epic might have values loaded into the category list, but each organization can choose to add, remove, or change these values on its own.

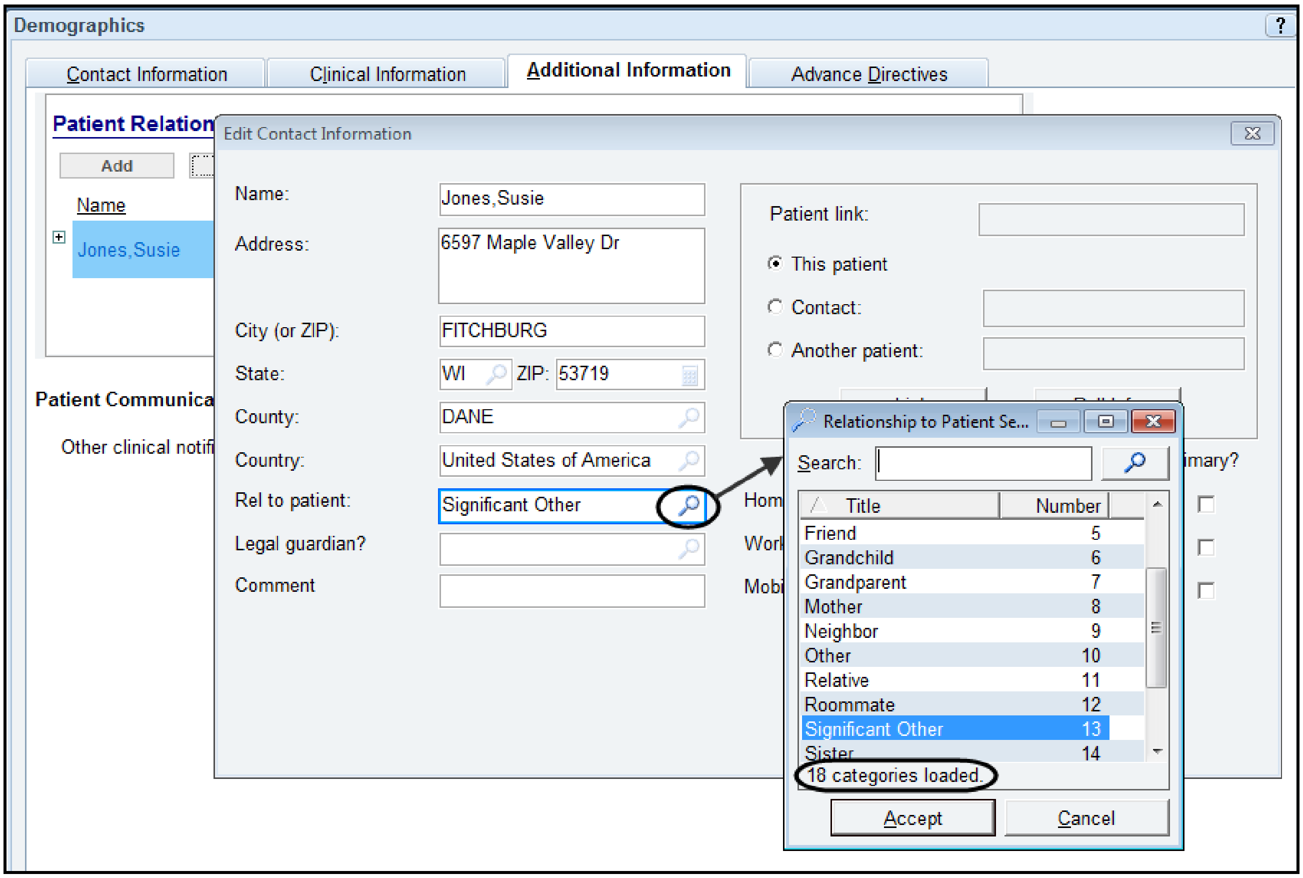
For example, the immunization manufacturer category list that is used in the Immunizations/Injections activity is editable. Your organization might use vaccines from particular manufacturers. As a result, your list might be very different than other customer organizations' immunization manufacturer list.

When working in the Category List Maintenance activity, you can identify a particular category list as customer-controlled when you see a message like "Release Range: All Customer Owned".

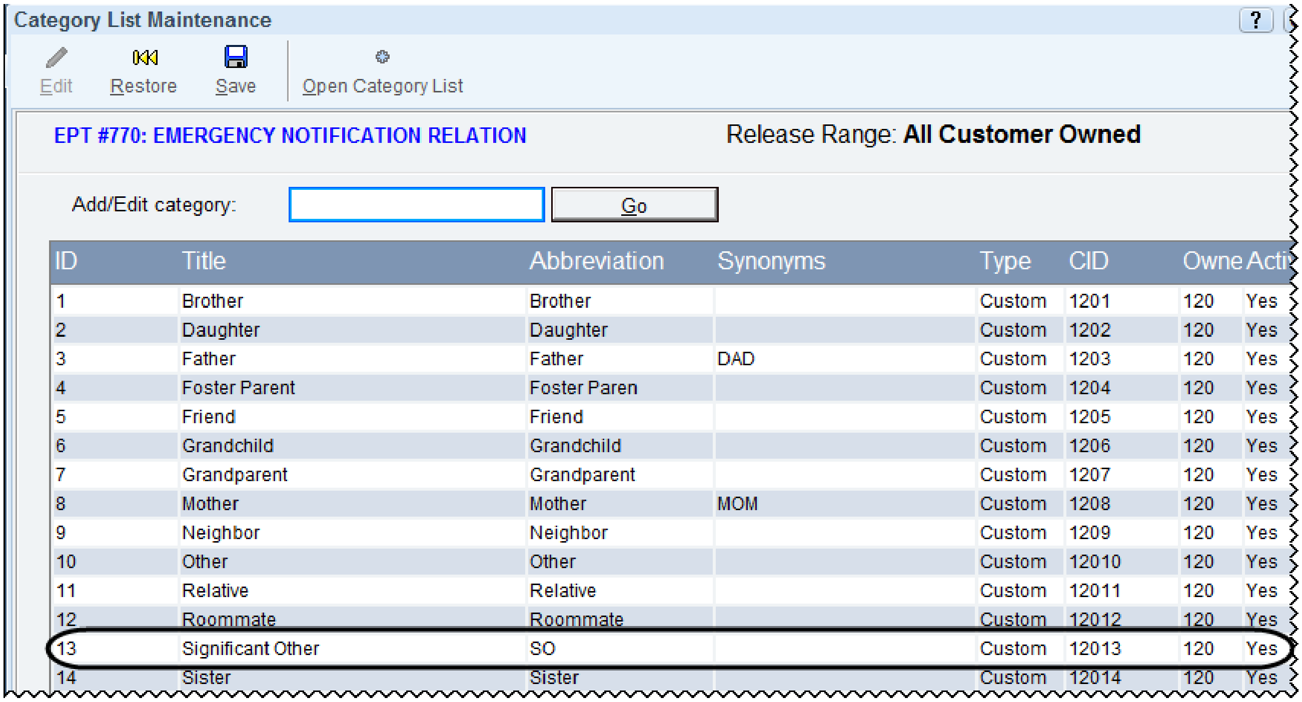
Parts of a Category List

The following example includes information about the parts of a category list and its values. This example also refers to the Relationships category list (EPT 4390). This category list is used in the Demographics activity for emergency contact relationships.

When you use the term 'category list,' you are referring to an entire list. Each individual choice on the list is called a category value. Values have certain details associated with them: number, title, synonym, and abbreviation.



As you can see in the preceding screen shot, each value on a category list has a title (the name of that value) and a number (ID). If you were working on this category list in the Category List Maintenance activity, the Significant Other value would look like this:



ID	Title	Abbreviation	Synonyms	Type	CID	Owne	Acti
1	Brother	Brother		Custom	1201	120	Yes
2	Daughter	Daughter		Custom	1202	120	Yes
3	Father	Father	DAD	Custom	1203	120	Yes
4	Foster Parent	Foster Paren		Custom	1204	120	Yes
5	Friend	Friend		Custom	1205	120	Yes
6	Grandchild	Grandchild		Custom	1206	120	Yes
7	Grandparent	Grandparent		Custom	1207	120	Yes
8	Mother	Mother	MOM	Custom	1208	120	Yes
9	Neighbor	Neighbor		Custom	1209	120	Yes
10	Other	Other		Custom	12010	120	Yes
11	Relative	Relative		Custom	12011	120	Yes
12	Roommate	Roommate		Custom	12012	120	Yes
13	Significant Other	SO		Custom	12013	120	Yes
14	Sister	Sister		Custom	12014	120	Yes

ID	If a user knows a value (ID), she can enter that numeral instead of the name. Ex: Nurse Terry knows that Grandparent is value 7 in the **Rel to patient** field.
Title	The title is the word associated with that value. It is what appears in the field after you make a selection. In this example, the title is Grandparent. Note: Titles have an 85-character limit.
Abbreviation	Abbreviations are short names for the title and are used when there is not enough space to display the entire title. The default abbreviation is the first 12 characters of the title.
Synonym	Synonyms are optional for category values. Synonyms provide different names that you can enter to look up this value. For example, if Nurse Terry enters "Mom" in the Rel to patient field and presses Enter, then the value's title of Mother appears.

Step 1: Find the Category List's Address

In order to go into a category list and edit it, you have to know the address of that category list. The address of a category list is simply the master file initials (INI) and item number. This section describes how to look up category list addresses.

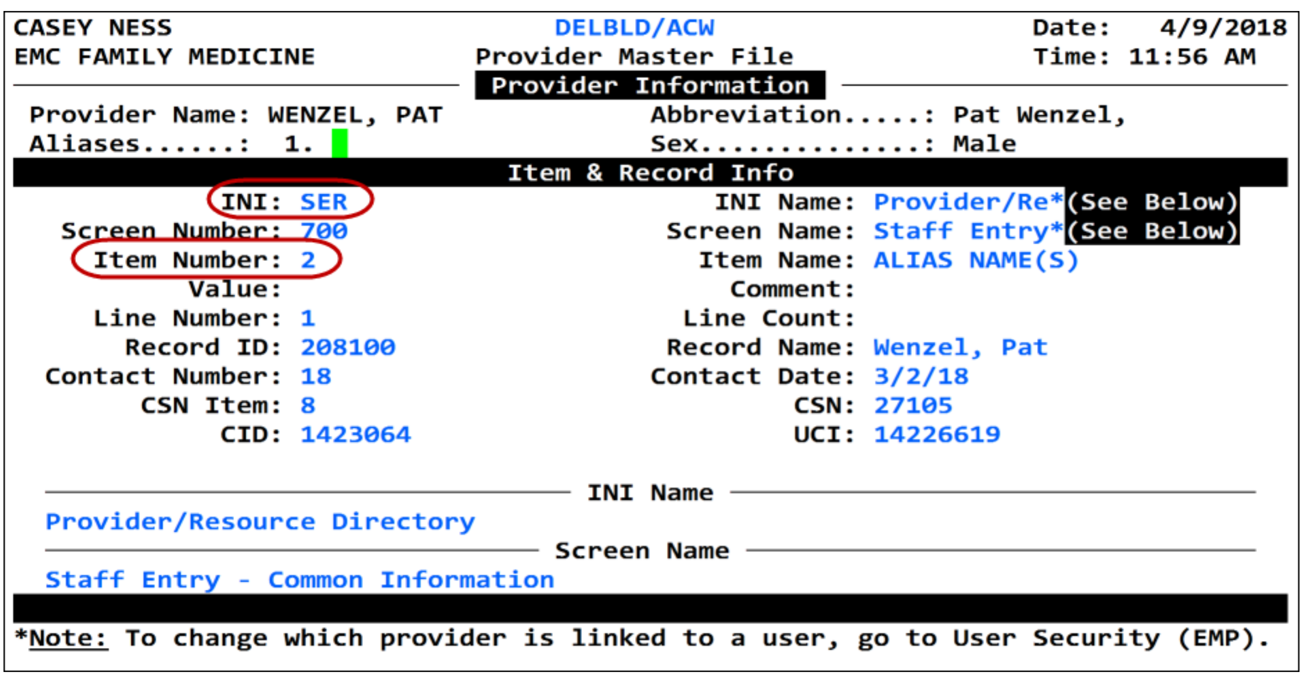
The sets of keystrokes that are described in the following "How To" sections are not unique to looking up information about items that use category lists. You can use these keystrokes to look up information about items with any data type (category lists, free text/string, date, etc.).

Find the Address in Hyperspace

1. In Hyperspace, hold down **CTRL** and left-click once in the desired field.
2. The Item Information window appears, showing the INI and item number.
3. To see more information, click **More**.

Find the Address in Clinical Administration

1. In Clinical Administration, navigate to the desired item in a record.
2. Press **HOME+F8** (presents information in the middle of the screen).
3. Press **ENTER** to make the information disappear.



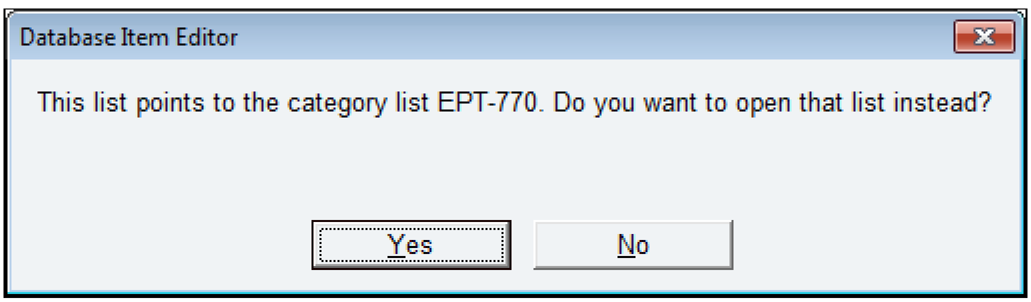
Step 2: Make Changes to a Category List

Once you know the address of the category list you wish to edit, click **Category List Editor** on your dashboard. Specify which category list you want using the following fields:

- **Database:** enter the INI. Another way to find the database is to enter the title of the master file.
- **Item:** enter the item number. Additionally, you can find the Item number by entering the title name of the item.

There are often items in different master files that use the same category list. Depending on which master file you access when looking up the address of a particular list, you will find that the same category list has multiple addresses. In a provider record, for example, you can specify the sex of the provider-that is item 1340 in the Provider (SER) master file. Likewise, in a patient record, you can specify the sex of the patient-that is item 130 in the Patient (EPT) master file. Both items point to the same category list. Therefore, this category list can be described with two addresses: SER 1340 and EPT 130.

If the selected category list is used by more than one item, the address you entered will cause the system to prompt you with a window. By clicking Yes, the system will direct you to the address for the other item so you can then do editing.



Add a New Value

1. Open the desired category list.
2. In the **Add/Edit category** field, type an ID number that isn't already in use.
3. For **Title**, type the name of your new value.
4. For **Abbreviations**, the system will suggest one if you press **TAB** to get there.
5. Click **Accept**.
6. Click **Save**.

Edit a Value

If you need to edit a value on a Category List, click on the row of the value you want to edit. The fields for that value will be listed below in Edit Category. Follow the steps described above.

Deactivate a Value

There will be instances in which your organization no longer wants a particular value on a category list. There are two ways you can deal with this: deactivate or delete the value.

When you deactivate a value, you're essentially freezing it so that value will no longer appear as a choice on the list. Additionally, you won't affect records that have previously chosen that value.

When you're working in a production environment (actual patients and users), Epic recommends deactivating values instead of deleting values.

1. In the Category List that you need to deactivate, click on the row of that value. Click **Deactivate**. (The Active column for that value is now set to No.)
   - If you would like to reactivate it, with the value selected, click **Activate**.
2. Click **Save**.

- If you see a prompt that tells you that you cannot deactivate the value, it means this particular list is not set up to allow deactivation at this time.

If you have previously inactivated values on a list and would now like to see what those values are, select the Inactive category values checkbox underneath the category list.

Delete a Value

There may be instances in a test environment or certification environment in which you would choose to delete a category list value.

> ! Deleting a value actually removes the value from the system! Epic discourages deleting values in a production environment, since any historical use of that value will be erased in all records which once contained it.

To delete a value, select the value in the Item Editor window and click **Delete**. You will be prompted to deactivate, but can choose to proceed with deletion by clicking **No** at the prompt. **Save** the deletion.

If you try to delete a value that is already deactivated, you must first reactivate it before the delete button will appear.

Self-Study Exercises

Exercise 1: Explore Items and Values

In this exercise, you'll explore a patient record and a user record to determine item numbers and possible values that could be used for those items.

1. Log in to Hyperspace as a nurse.
2. Open the chart of any patient on your schedule.

- If you don't have a patient on the schedule, create an office visit encounter with any patient from your Classroom Information Sheet: **Epic button > Patient Care > Encounter**

3. Go to the Demographics activity (available under the **More** button).
4. Use **CTRL+** Click to find information about these items:

Field name	INI	Item Number	Data type allowed
BIRTH DATE	EPT	110	DATE
PATIENT STATUS	EPT	102	CATEGORY

5. Log in to text as a builder.
6. In Clinical Administration, navigate to the Diagnosis master file and open any record.
7. Use **HOME+F8** to find information about these items:

Field name	INI	Item Number
NAME	EDG	7
CLINICALLY INACTIVE? (second screen)	EDG	207

Reviewing the Chapter

Review Questions

1. What information do you need to access a list in the Category List Maintenance activity?
   YOU NEED THE INI AND ITEM NUMBER.
2. Your organization has a category list in your production environment with values that are no longer used. Does Epic recommend deleting or deactivating those values?
   DEACTIVATE VALUES IN A PRODUCTION ENVIRONMENT. DELETING VALUES IN A PRODUCTION ENVIRONMENT WILL ERASE ANY HISTORICAL USE OF THAT VALUE.
3. You're working in the Category List Maintenance activity and see this message: "Release Range: All Categories". What does that mean?
   IT MEANS THAT THE CATEGORY LIST IS A SYSTEM (EPIC CONTROLLED) LIST, SO IT IS UNEDITABLE.

Review Key

1. What information do you need to access a list in the Category List Maintenance activity?
   YOU NEED THE INI AND ITEM NUMBER.
2. Your organization has a category list in your production environment with values that are no longer used. Does Epic recommend deleting or deactivating those values?
   DEACTIVATE VALUES IN A PRODUCTION ENVIRONMENT. DELETING VALUES IN A PRODUCTION ENVIRONMENT WILL ERASE ANY HISTORICAL USE OF THAT VALUE.
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   IT MEANS THAT THE CATEGORY LIST IS A SYSTEM (EPIC CONTROLLED) LIST, SO IT IS UNEDITABLE.

Study Checklist

Make sure you can define the following key terms:

- ☐ Category list
- ☐ Category value
- ☐ Types of category lists: system, extendible, customer
- ☐ Parts of a category value: title, abbreviation, synonym, ID number
- ☐ Category list address
- ☐ INI
- ☐ Item number

Make sure you can perform the following tasks:

- ☐ Look up the address of a category list in Hyperspace and Clinical Administration
- ☐ Add a single value to a category list
- ☐ Edit a value
- ☐ Deactivate a value
- ☐ Recognize when the Category List Maintenance activity is telling you that a category list: is uneditable or editable
- ☐ Recognize when the Category List Maintenance activity is prompting you to use another address to access the desired category list

Make sure you fully understand and can explain the following concepts:

- ☐ Why a category list might have two addresses
- ☐ Deleting versus deactivating a value on a category list
- ☐ Why some lists are Epic-controlled, while others may be extendible or customer-controlled

Lesson 12: Beyond the Basics: Online Tools Exploration

Beyond the Basics: Online Tools Exploration

Epic Resources

After leaving training at Epic, you will likely get asked questions to which you do not know the answers. This section outlines supplemental resources that are available to you that will help you find the information that you need. Below is a list of the tools available to you and how they should be used. For more information, go to the UserWeb Overview, which is available in the top right corner of the UserWeb.

> While knowing what's available on the UserWeb is not required for certification, you will use Epic's online resources frequently during and after certification. Use this Online Tools Exploration to help you become more comfortable with the resources available to you beyond certification.

UserWeb	Online collection of tools and information about Epic and our software. On your homepage, you can favorite discussions to follow/participate in using the . The UserWeb is the main page that links out to all other resources on this list. https://userweb.epic.com
Galaxy	Epic's online documentation portal. Contains training materials, setup and support guides, and a variety of other useful documents. Get into the habit of marking documents as favorites (clicking the star). This way you will be notified if significant changes occur to that document, keeping you up to date on build well after training. https://galaxy.epic.com
weLearning	Epic-provided platform for e-learning content. Hosts e-learnings created by Epic as well as customer built modules. https://welearning.epic.com

Community Library	The Community Library is Epic's content sharing program. Technical Services representatives routinely extract content data from volunteering customers' systems, which Epic then hosts on the UserWeb for review and use by others in the Epic community. https://comlib.epic.com
Sherlock	Epic's web-based issue tracking tool. Use Sherlock to have direct access to create and update Support Logs (SLGs), Release Authorizations, and Reportable Issues. https://sherlock.epic.com
Training Home	Epic's Training Home website, encompassing a variety of training-related tools used by our organizations. Contains Certification Tracking, Course Catalog, Cert Environment Registration, Exam Requests, Training Announcements, and Training Wheels materials. https://training.epic.com
Data Handbook	Contains in-depth information on Reporting Workbench and Crystal reports, registries, and print groups. Developers can explore the Web Services section to see Epic APIs and learn about Epic's open system. https://datahandbook.epic.com
Nova	Nova is an Epic-developed web program for release note management. You can use Nova to assign and review release notes, select which enhancements to implement, and report on release note progress. https://nova.epic.com

Exercise 1: Explore!

Begin by logging in to the UserWeb. To go back to the UserWeb home page, click Epic UserWeb on the top left.

X	Training
	There are two ways to access Training from the UswerWeb home page: • Main menu: Training Home • Right side: Scroll to Training > Training Home
	Read important dates (hint: top right).
	Find your certification information/courses (hint: left).
	Read the Information Station menu (hint: right).
	Go to the Course Catalog (hint: Information Station). • At the top, filter on your Application (e.g. EpicCare Ambulatory). • Courses are in order by the first numerals in their IDs, located at the top right of each card. Find your next course and read the summary of the class.
	Go to the Train Tracks view (hint: tab at top) and: • Filter on your specific certification. • Find your next course and identify its prerequisite requirements. • On the left side, scroll down to the Badges list. These are post-certification learning opportunities. Choose and badge and read its details.

X	Galaxy
	Go to Galaxy (hint: main toolbar).
	Filter on **Epic-Led Training** (hint: left).
	Search "CLN251/252 TC" (hint: top).

X	Galaxy
	Identify the CLN251/252 training companion and store it as a favorite (hint:)
	Clear all filters (hint: **Galaxy** top left) and: • Create a New Folder to store resources for your certification. • Drag your recently favorited CLN251/252 companion to your new folder. • Make sure you will be notified of updates to favorites (hint: check box at top).

X	Discussion Forum
	Go to the UserWeb home page.
	Look through forum topics (hint: left).
	Subscribe to a topic (hint:).
	Investigate your options (hint: top). 

X	weLearning (e-learning)
	Two ways to get there from the UserWeb home page: • Main toolbar: Show All > weLearning • Right side: Scroll to Training > weLearning
	Search on "smarttool config" and find GEN650, 651, and 652. Notice that each has a link to a workbook. You will use these after AMB100 or INP 100 as part of a self-study assignment. • This is also where you can find all of the e-learnings referenced in this companion!
	Explore creating weLearning filters and clearing them (hint: link on right). 

Appendix A: Additional Practice

Appendix A: Additional Practice

Additional Practice

Use the following additional exercises to synthesize the material you have learned in class. You will not go through all of these exercises while you are in class, but the answers are in this companion on Galaxy.

Terminology Review

Exercise 1: Chronicles Terminology

Fill in the blanks:

____CHRONICLES____ is Epic's database management system. It is divided into ____MASTER FILES____, like Patient and Diagnosis. Each has a three-letter identifier (initials), called the ____INI____. In each, there are ____RECORDS____, which can be compared to file folders. If you were to look at the details of several users, for example, you would find that each has the same fields for recording information. Those fields are called ____ITEMS____, and the specific answers are called ____VALUES____. Lastly, you can track changes over time as separate ____CONTACTS____.

Exercise 2: Text-Side Keystrokes

Match each keystroke/command to the resulting action.

Keystroke	Action
_3_ Shift+F5	1. Display a list of records in this master file
_5_ Equal sign (=)	2. Exit the record from any screen
_4_ Page Up	3. Display help text for an item
_6_ opt	4. Go to preceding screen in a record
_2_ Shift+F7	5. Open the most recently accessed record
_1_ Question mark (?)	6. Jump to initial main menu

Staff-Related Record Review

Exercise 3: Staff-Related Records in Action

Read the following scenario about setting up emergency department staff. For each part, identify the words that help you identify which master file is being described, and determine how many records in the master file you would need for each job role.

1. There are 10 technicians and 15 nurses who will need to log in.

Key words	Master file	Techs	RN
LOG IN	USER (EMP)	10	15

2. Although the techs check in patients, they don't do clinical documentation, nor are they accredited. The nurses are all registered nurses, so they do clinical documentation and whenever their name appears on any documentation in Epic, it should end with "RN."

Key words	Master file	Techs	RN
CLINICAL DOCUMENTATION, ACCREDITED	PROVIDER (SER)	0	15

3. (All of the following is ASAP or emergency department functionality.) All of the techs should be able to room a patient, transfer a patient within the ED, and change an ED patient's status. The nurses should be able to do those tasks, plus use the ED Navigator.

Key words	Master file	Techs	RN
BE ABLE TO	SECURITY CLASS (ECL)	1	1

4. (All of the following is Inpatient functionality.) The nurses also need access to flowsheets, the MAR, the Summary activity, and Order Entry for ED patients. The ED techs only need access to Summary.

Key words	Master file	Techs	RN
ACCESS	SECURITY CLASS (ECL)	1	1

Exercise 4: RCP and RCP Supervisors Build Scenario

After reading all the scenario parts below, answer the configuration questions.

Master File(s) affected:	Scenario Parts
USER	*Part A:* There are 30 respiratory care practitioners (RCP) in the respiratory therapy department. The RCPs are the only 30 people working in the department. All 30 of them need to log in to Epic.
SECURITY	*Part B:* For their Inpatient-based work, all of them need access to Patient Lists, Summary, Chart Review, Flowsheets, Orders, and Notes.
USER	*Part C:* Regardless of where they work physically, the RCPs always choose a login department of "IP Respiratory Therapy."
PROVIDER & SECURITY	*Part D:* They are NOT authorizing providers, but they should be scheduled with patients. While they should be able to write orders, their orders will require a cosign.
SECURITY	*Part E:* They use the In Basket and various shared functions (like Provider Finder, SmartTools, etc.) like any other user.
ROLE	*Part F:* When the RCPs log in, their startup activity should default to the Patient Lists activity.
PROFILE	*Part G:* When they are in the Summary activity, they should have three reports available to them: an RCP Accordion Report, an RCP Meds Due report, and a

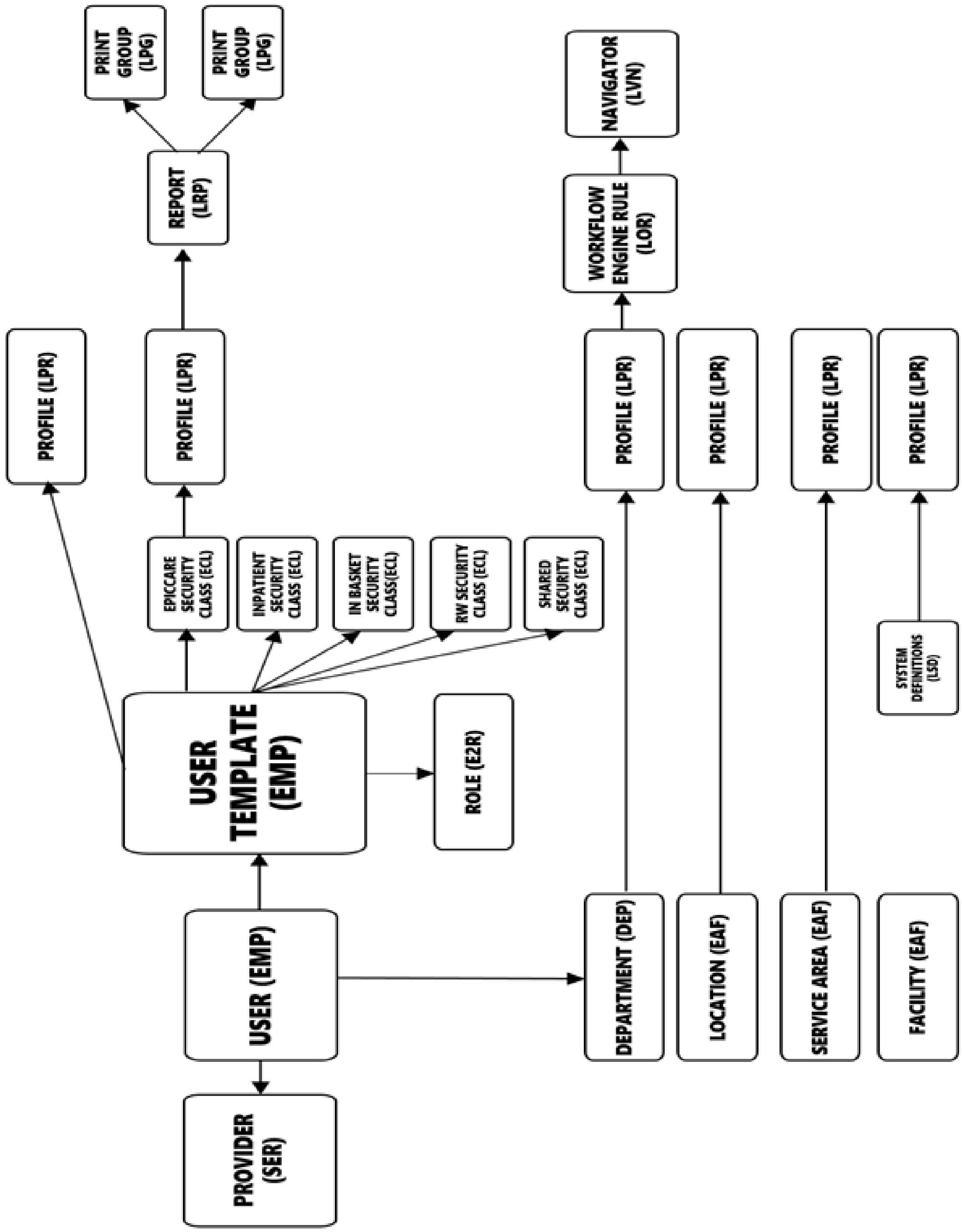
Master File(s) affected:	Scenario Parts
	Patient Profile report.
PROFILE	*Part H:* Two of the 30 Respiratory Care Practitioners are supervisors, Johnny Spirometer and Sally Breathwright. In addition to the same Summary reports used by all the RCPs, Johnny and Sally need two special reports available in the Summary activity: "MAR Compliance Report" and "Flowsheet Compliance Report."

1. How many user records and provider records are needed for the RCPs and their supervisors?
   30 USER RECORDS (PART A), 30 PROVIDER RECORDS (PART D)
2. Which types of security classes will the RCPs need? For each type, how many different records would you build?
   - EPICCARE SECURITY CLASS: 1 (PART D)
   - INPATIENT SECURITY CLASS: 1 (PART B)
   - IN BASKET SECURITY CLASS: 1 (PART E)
   - SHARED SECURITY CLASS: 1 (PART E)
   - REPORTING WORKBENCH SECURITY CLASS: 1 (EPIC RECOMMENDS ALL USERS HAVE A CLASS OF THIS TYPE
3. How many role records are needed? Specifically for this set of scenarios, what role-based items were described?
   ONE ROLE RECORD IS NEEDED. (PART F). THEY ALL HAVE THE SAME STARTUP ACTIVITY: PATIENT LISTS. (PART F)
4. Use the following table to answer these questions (you can set up linkable templates for the RCPs however you see fit):
   - Besides the system-level profile, you need two additional profile records. How would you differentiate them by name?
   - What settings would be made in each?
   - For efficiently creating a composite profile, at what level of the profile hierarchy would you link each of these profiles?

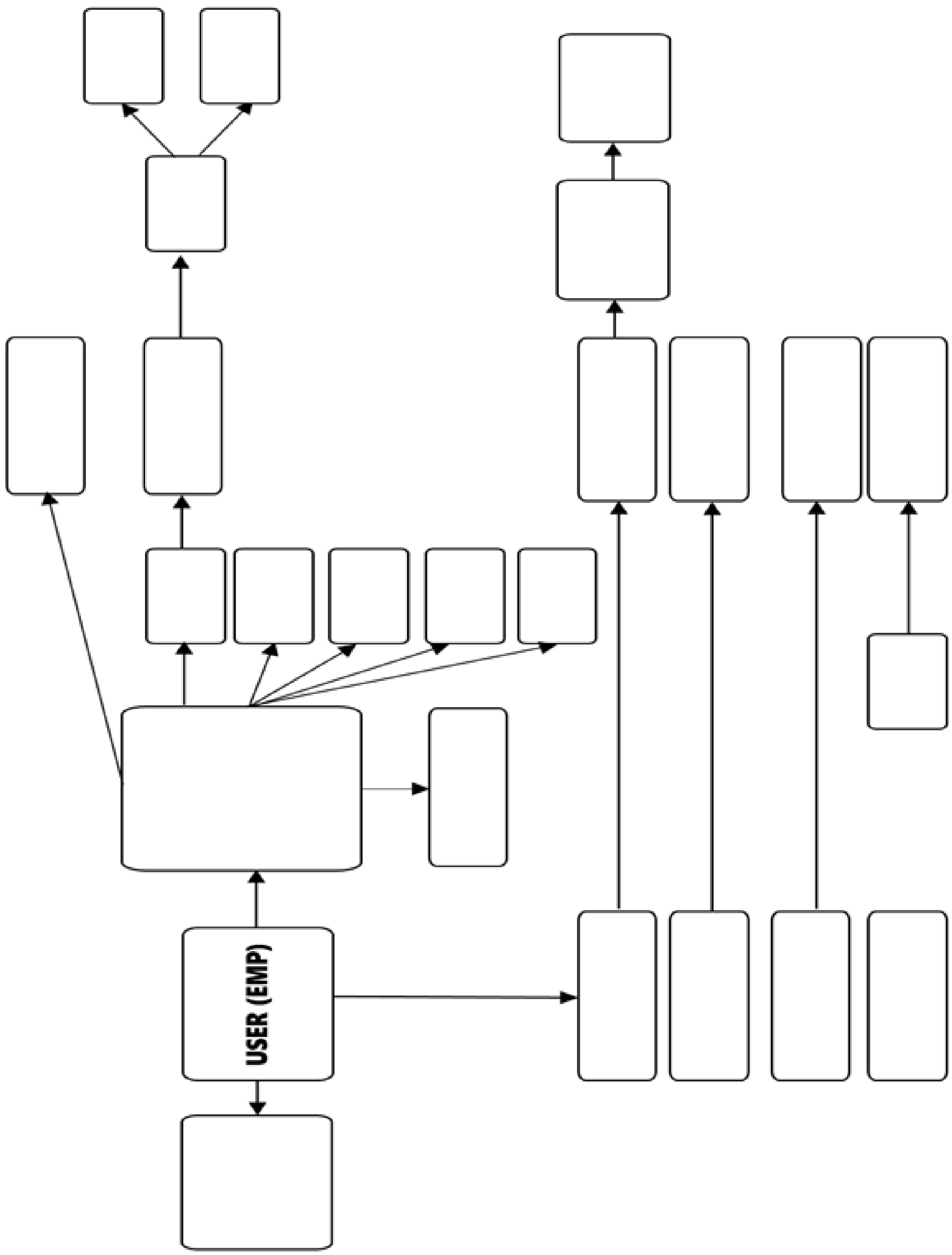
Profile record name:	What should be set up in this profile:	Link this profile to...

Profile record name:	What should be set up in this profile:	Link this profile to...
RESPIRATORY CARE PRACTITIONER SUPERVISORS	5 PATIENT SUMMARY REPORTS (PART H)	SUPERVISORS' USER TEMPLATE RECORD
RESPIRATORY CARE PRACTITIONERS	3 PATIENT SUMMARY REPORTS (PART G)	DEPARTMENT RECORD

Big Picture Review



Fill-In Diagram

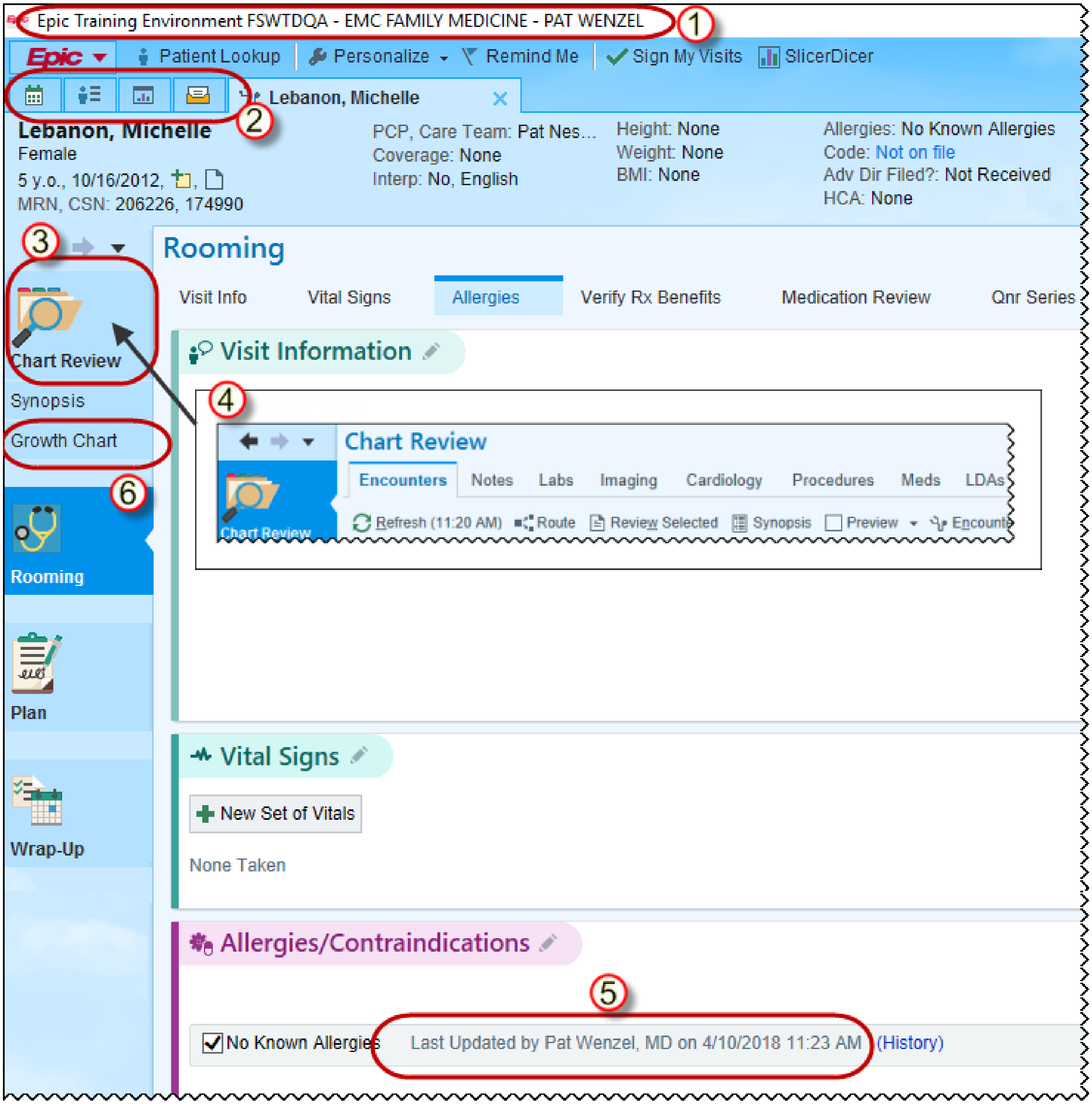


Exercise 5: 20 Questions Review

1. What record must be created in order for a person to log in to Epic?
   USER (EMP)
2. What record must be created for a person or resource that meets certain clinical criteria?
   PROVIDER (SER)
3. What criteria might be met for a user who is also a provider?
   - SCHEDULABLE
   - CLINICALLY DOCUMENTS IN PATIENT CHARTS
   - REFERS TO/FROM
4. What record can be created to ease setup and maintenance for groups of users with similar job roles and set up needs?
   USER TEMPLATE (EMP)
5. What record controls the layout and ground rules of Hyperspace?
   ROLE (E2R)
6. Which records control access to activities and functionality in Epic?
   SECURITY CLASS (ECL)
7. Which three types of security class should be assigned to every user?
   - IN BASKET
   - REPORTING WORKBENCH
   - SHARED
8. Which type of security class should be assigned to every user of clinical tools?
   EPICCARE
9. Which type of security class should be assigned to every user or clinical tools in an inpatient/hospital setting?
   INPATIENT
10. Which type(s) of security class might be assigned to clinical users of specialty modules?
    APPLICATION CLASSES AS NECESSARY (E.G. STORK, BEACON)
11. Which items in the user record have unique values that can't be set in a user template?
    - LOGIN DEPARTMENT
    - USER ID
    - PASSWORD
    - LINK TO PROVIDER
    - LINK TO TEMPLATE

12. Which records control options within activities?
PROFILE (LPR)
13. List the entities in the profile hierarchy from most specific to most general.
USER TEMPLATE > EPICCARE SECURITY CLASS > DEPARTMENT > LOCATION > SERVICE AREA > SYSTEM DEFINITIONS
14. Which options within activities are controlled by profiles?
    - CHART REVIEW TABS
    - PREFERENCE LISTS
    - REPORTS
15. How does the system search the profile hierarchy to create a compiled profile?
TOP DOWN (SPECIFIC TO GENERAL), ITEM BY ITEM, SOME ITEMS ARE ALL OR NOTHING
16. Which records are the building blocks of reports?
PRINT GROUPS (LPG)
17. What are the three possible styles of a print group?
    - PLAIN TEXT
    - RICH TEXT
    - NATIVE HTML
18. What record can give end users different tools based on context, such as patient age or encounter type?
WORKFLOW ENGINE RULE (LOR)
19. Which records are created to guide clinicians through workflows efficiently?
NAVIGATORS (LVN)
20. Name the three parts of a navigator.
    - SECTION
    - TOPIC
    - TEMPLATE

Exercise 6: Key Records in Hyperspace



1. A ____USER____ record allows a person to log in to Epic.
2. A ____ROLE____ record determines the look and feel of Hyperspace, including the Startup Activities, maximum number of workspaces, and toolbar buttons.
3. ____SECURITY CLASS____ records control access to functionality. This user has the ____SECURITY POINT____ to access Chart Review.
4. A ____PROFILE____ record controls options within activities. When this user opens Chart Review, the tabs appear in the order pictured.

5. A ____PROVIDER____ record specifies the credentials that should appear after a clinician's name.
6. A ____WORKFLOW ENGINE RULE____ record has caused the Growth Chart activity to appear for this pediatric patient.

Additional Practice

Exercise 7: Plan for a New User

You are asked to build all of the records needed for Dr. Simon Stitches, a surgeon just hired by your organization.

Draw a diagram or list out all of the staff-related records below each bullet point that you will need to build to accommodate his needs.

Dr. Stitches:

- Needs to log into Hyperspace
  USER RECORD
- Is scheduled with patients, is an MD, and provides care
  PROVIDER RECORD
- Is an authorizing meds and orders provider
  PROVIDER RECORD
- Works at Precision Incision Surgical Associates where he logs in to Epic and has appointments with patients
  USER RECORD (LOGIN DEPARTMENT), PROVIDER RECORD (SCHEDULABLE DEPARTMENT)
- Needs to access tools to help his admitted patients at Heal University Medical Center
  INPATIENT SECURITY CLASS
- Also works in Epic's OpTime application at Heal University
  OPTIME SECURITY CLASS
- Wants to see a list of scheduled appointments and admitted patients when he logs in
  ROLE
- Wants to see a list of surgically-relevant reports in Summary and Chart Review
  PROFILE
- Wants a new Workflow Conductor report that includes a section of pre-surgery instructions
  PRINT GROUP, REPORT, PROFILE
- Wants a preference list that includes specific orders for pre-op, intra-op, and post-op
  PROFILE
- Wants a specific navigator for procedure tasks like ordering, documenting and charging only when he is performing a surgery

NAVIGATOR SECTION, NAVIGATOR TOPIC, NAVIGATOR TEMPLATE, WORKFLOW ENGINE RULE, PROFILE

Exercise 8: Plan for Several New Staff

The purpose of this exercise is to synthesize the material covered in CLN251/252. This exercise should be done independently while reviewing and studying for the exam. As you read the scenario, it may be helpful to highlight important information within the scenario and diagram the records out on another piece of paper.

Scenario:

The Verona Family Medicine department is going live on Epic. You are in charge of setting up the records needed for the staff to work in Hyperspace.

Two physicians work in the department: Dr. Jones is a family practice physician who occasionally sees admitted patients at Verona Area Hospital. Dr. Smith is a family practice physician who also specializes in Obstetrics/Gynecology and delivers the babies of his patients at the hospital. Two RNs and one LPN also work at the clinic. They never work at the hospital.

Dr. Smith and Dr. Jones need access to the same activities at the clinic. They need access to different activities at the hospital, and Dr. Smith also needs to be able to access obstetrics functionality. Dr. Jones never uses obstetrics functionality. Both should see the schedule when they log in, but they should have different options available under their Epic button and More Activities tab. They also need to see different reports and preference lists.

The two RNs and one LPN should all see the schedule when they log in. The RN's options under the Epic button and More button should be different than those of the LPN. The two RNs need the same access to activities. The LPN has less access. All three should see the same reports and Chart Review tabs when they log in.

Synthesis:

1. What is the minimum number of EpicCare Security classes you need? __3__
2. What is the minimum number of Inpatient Security classes you need? __2__
3. What is the minimum number of Stork Security classes you need? __1__
4. What is the minimum number of roles? __4__
5. In addition to the profile set at System Definitions, what is the minimum number of profiles you need for the three nurses? __1__
6. At which level of the hierarchy would you attach the profile to meet the nurses' needs? DEPARTMENT RECORD

7. You want to be as efficient as possible. Can you build one profile and attach it to the physicians' EpicCare Security class to meet their needs? ___NO___
8. A resident will be starting a rotation at the clinic in two months. How can you set up a user ID and password for the resident but make it inactive until she starts?
   BUILD A USER RECORD FOR THE RESIDENT AND WITHIN THAT RECORD, INDICATE THE DATE THE RECORD SHOULD BE ACTIVE. YOU CAN ALSO LEAVE THE RECORD INACTIVE AND MANUALLY ACTIVATE IT WHEN SHE STARTS.
9. The three nurses will always log in to Verona Family Medicine and don't want to have to choose that department every time. In which record can you set this up?
   USER RECORD: LOGIN SETTINGS SCREEN. SET DEFAULT LOGIN DEPARTMENT AND SELECT OPTION TO SKIP LOGIN SCREEN.
10. The physicians will usually log in to Verona Family Medicine. Sometimes they will log in to inpatient units, but they want the system to revert back to their default login department each time instead of remembering their last login department. In which two records must you make settings to achieve this?
    USER AND ROLE

Appendix B: Certification Resources

Appendix B: Certification Resources

Sample Exam

Please reference your Fundamentals companion for more details regarding downloading the training materials, watching e-learnings, accessing the certification environments, and certification in general.

Sample Exam

The Configuring the Epic End User sample exam is accessible online on the UserWeb. It provides you an opportunity to become familiar with Epic's online testing in addition to responding to question topics and question types that you will see on the actual Configuring the Epic End User exam.

We recommend that you do the sample exam after you have studied, but when there is still time for further study before you take the actual exam.

To simulate an actual testing experience:

- Sequester yourself from interruptions.
- Have all of your notes and other class materials available.
- Have a training practice environment open.

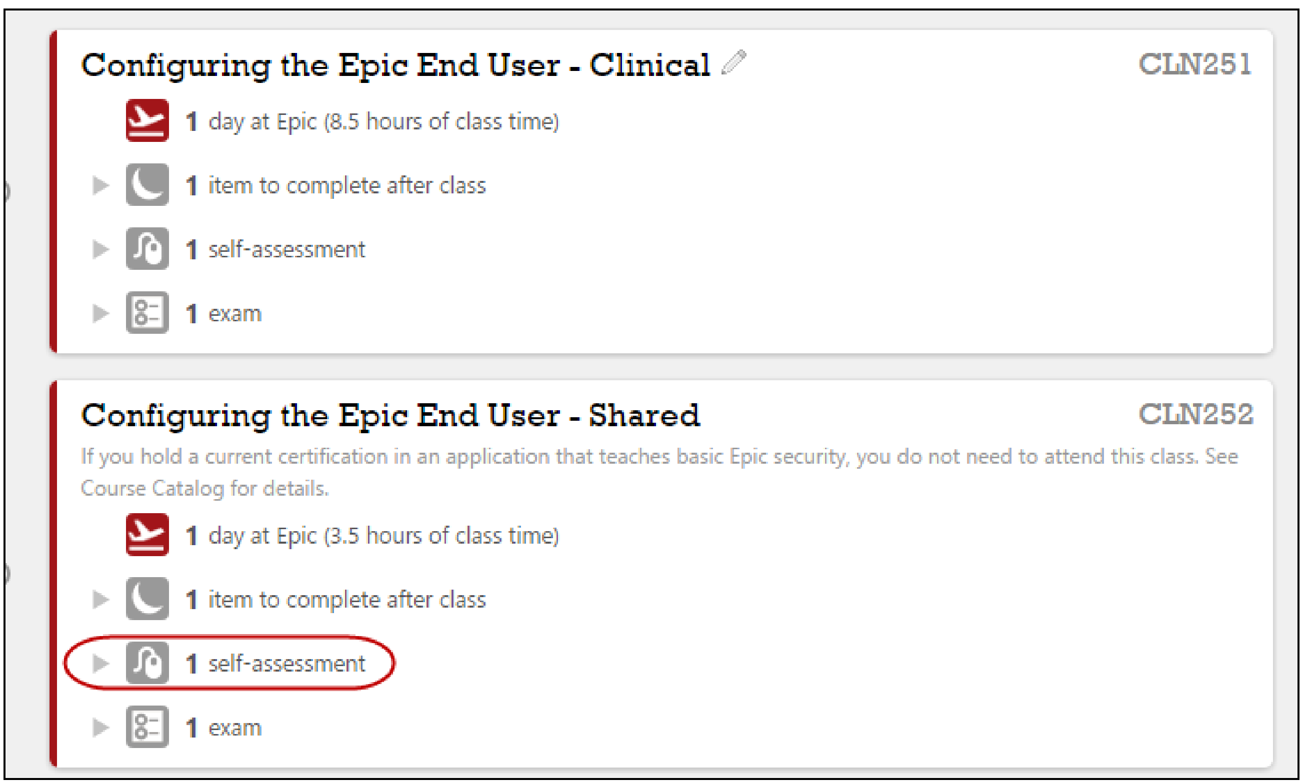
The sample test offers a representation of the question topics and question types that you will see on the actual test (True/False and Multiple Choice-single and multiple selection).

The following table shows the per topic emphasis on the test to assist you in studying:

Topic	% of Exam
Chronicles, Facility Structure, Text Navigation, Category Lists	13%
Providers, Users, Templates	17%
Security Classes, Roles, Profiles	17%
Workflow Engine Rules, Navigators , Reports & Print Groups	13%
Big Picture	42%

Access the Online Sample Exam

1. On the UserWeb, access the Course Catalog (https://training.epic.com/coursecatalog/).
2. Go to the Train Tracks tab (top of screen) and filter on your Application.
3. Locate Configuring the Epic End User- Shared.
4. Expand the **1 self-assessment item** and click the **Configuring the Epic End User Clinical/Shared Sample Exam** link.



Sample Exam Frequently Asked Questions

Must I have a proctor?	No
Is the sample exam automatically timed?	No. Unlike the online actual exam, it will not timeout. Your goal should be to complete the sample exam in 30 minutes, as it is about one quarter the length of the (2 hour) actual exam. Because it is not actually timed, feel free to take some time to familiarize yourself with tools such as bookmarking, jumping back to previous questions, and so on. Tip: The actual exam shows a timer so you can keep track of how much time is left.
After I submit the sample exam, am I notified with a score?	Yes. You will receive an email at the address we have on file for you. In addition to the score, the email will include teaching objective-related comments for questions you answered incorrectly.
Is anyone else notified about my score?	Yes. Like the actual exam, your Epic representative and a contact person for your organization will receive the score email.
Does this score count toward certification?	No. While this score will exist in your score record at Epic, it will not be used in any certification calculations.
Can I take the sample exam multiple times?	Yes.
Must I wait for a certain period of time before I can retake it?	No. Unlike the actual exam, there is not an imposed wait time.
If I re-take it, will I get different questions?	No. Unlike the actual exam, the sample exam contains static questions, but their order will be randomized.
Can I have an appointment review?	No. Exam reviews are only available for actual exams. However, the answer key for the sample exam is posted on Galaxy.

Exam

Exam Preparation

In practice environments, Dr. Andy will not have any patients on his schedule.

To open an encounter with Dr. Andy, use the following path: **Epic > Patient Care> Encounter**. From here, you can look up any patients used in class and access their encounters.

Requesting an Exam and Proctoring

When and how should I make arrangements?	• Exams must be ordered via the Exam Request Form on the UserWeb at least 7 calendar days before the desired testing date. • Questions? exams@epic.com
What are proctoring options within my customer organization?	Most exams are typically proctored at a location within your organization. • For a list of current proctors, click the Proctor dropdown of the Exam Request Form. Whether the proctor is set up for online exams or paper exams is noted behind the proctor's name. • To set up a new proctor for your organization, email exams@epic.com to request the proctor agreement. Proctors need to be direct employees of your organization and not be part of the Epic project team. Attending class or holding the status of Certified, Proficient, or Credentialed (or planning to follow any of these paths in the future) make the individual ineligible to become a proctor. They must be in the same room as the exam taker for the entire testing session. • If you are unsure of how to join a proctored exam session, reach out to one of your proctors.
What are options for third-party proctors?	An Epic-approved, third-party proctoring service is available for qualifying trainees to take online exams from any location using a webcam and high-speed internet connection (provided that your operating system meets the requirements). For more information,

	email exams@epic.com. • **Consultants:** You may use this proctoring service. • **Customers:** Your organization may opt in to use this proctoring service. If interested, a proctor or member of the project management team can email exams@epic.com for more information. Note that: • This service is not free. • To use this option, select Online Proctoring Services on the Exam Request Form.
What are options for proctoring at Epic?	At our Learning Campus in Verona, Wisconsin, we offer proctored exam sessions for customers and consultants most Fridays at 9 am. • You may not sign up if you are registered to be in a class at the same time. • During a session, you may take one exam to earn certification/proficiency or two CEE Application Essentials exams. • Available dates are on the Exam Request Form. • This service is free.
Where can I learn more?	Documents on the UserWeb: • **For customers:** Exam Instructions - Epic Community Member • **For consultants:** Exam Instructions - Consultant

Grading

If I took a paper exam, how do I return it?	Only your proctor may return the completed exam to Epic. Sign the cover page after completing the exam. You will receive an email from Epic when your exam is received.
When will I find out my score?	**Online exams:** The same day you take the exam. **Paper exams:** Within 3 full business days of the exam's arrival at Epic.
What is a passing score?	80% or higher

Exam Reviews

If I did not pass, may I have an exam review?	Yes, you may have a scheduled, 30-minute phone appointment to review concepts missed and get advice on study approach.
If I passed, may I have an exam review?	Yes. Please note that we give priority to scheduling exam reviews with trainees who did not pass the exam.
How do I arrange a review?	• **Customers:** Contact your Epic representative or AmbulatoryTrainingSubmission@epic.com. Provide possible dates/times and your phone number. • **Consultants:** Contact AmbulatoryTrainingSubmission@epic.com. Provide possible dates/times and your phone number. • **Internal Epic staff:** Contact AmbulatoryTrainingSubmission@epic.com. Provide possible dates/times.

Exam Re-Takes

If I didn't pass an exam, may I retake it?	Re-takes must be at least 7 calendar days apart. The score for each exam attempt is recorded. After 3 failed attempts of the same exam, the trainee will be required to re-attend the corresponding classes at Epic. This refresher training is free of charge for customers. If the trainee is seeking proficiency and has not attended the class at Epic previously, standard training fees apply. After 5 or more failed attempts of the same exam, customer trainees will be required to re-attend the corresponding class at Epic prior to each additional attempt. This training is billed at the normal rate. Consultants are not allowed additional attempts after 5 fails.
Are all copies of an exam identical?	They are not identical. If you retake an exam, you will receive an exam with a different mix of questions.

Maintain Certification: Continuing Epic Education Program

Continuing Epic Education (CEE) is a program for proficient and certified trainees. It is designed to help you grow your understanding of the current recommendations and workflows associated with your application(s).

After I am certified, am I certified forever?	No. It is your responsibility to maintain your certification or it will lapse.
What are the components of CEE?	• **New Version Training (NVT) - Recommended:** Stay current on the latest functionality. These are available on the UserWeb with the release of every new version. • **Application Essentials Exam - Required:** About every 3 years you will be expected to do this assessment. It is a proctored, one-hour exam that evaluates your knowledge on topics from the current version's classes.
Where can I learn more about CEE?	UserWeb > Galaxy > search on "continuing epic education"
How do I keep track of what I must do?	UserWeb > Training Home > Your Certifications section > **Certifications page** link When NVTs or exams become available, you will be sent a notification email with a list of all of your outstanding requirements.
Where are deadlines posted?	UserWeb > Training Home > Important Dates section