Provider

User Manual

CKD EHR by Epic

Provider End User Manual

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Iconography Legend

FYI/BACKPOCKET

FYI/Backpocket Iconography- Good information to have in the back of your mind

HYPERLINK

Hyperlink Iconography- Clickable link to external web sites OR locations within the manual

IMPORTANT/CRITICAL

Important Iconography- Important facts or information that you need to know

REMINDER

Reminder Iconography- Don’t Forget!

VIDEO REFERENCE

Video Reference Iconography- Epic’s **‘It’s Possible’** video series. Enter the **POSSxxx** into the search field to watch the video!

Playground Access and logins

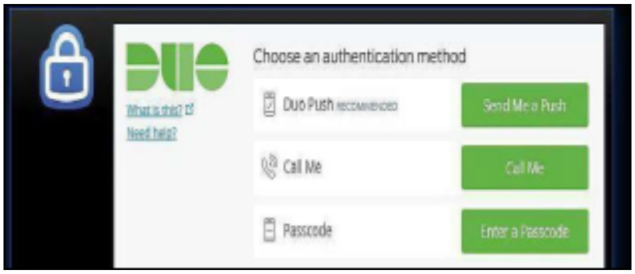
The **PLY** Hyperspace environment is a sandbox/playground environment for use after class to allow end users to practice workflows, complete after class exercises and take EUPA's before go-live in.

Your Ambulatory Principal Trainer has the playground set up with patients on the schedule and in the in Basket just like the Ace environment you logged into during the instructor led training session(s) you have attended.

The playground refreshes in the middle of the night each night, so whatever you practiced the day before will wipe out and allow you to start fresh again the next day.

Follow these steps to get started!

1. In a web browser go to ckdehr.davitaphysiciansolutions.com
2. Log into the Netscaler Gateway with **your unique personal Davita Active Directory User Name and Password** and select **Log On.**
3. Choose your authentication method based on your previously set up options in DUO options and authenticate accordingly.



4. From the Citrix Storefront single click the **PLY Hyperspace Icon** 

5. When the Playground Hyperspace window opens you will log into the Playground with one of the following 35 usernames. Because this list of usernames and passwords for the playground is shared with all users, the recommendation is to select a random user ID in the list. (ex: Clinstaff32/Neph13).
6. The Password for all Provider and Clinical Support Staff Usernames is **Train.**
7. The login Dept is **DPS Train Nephrology.**

User ID	Provider Name (Password =Train)	User ID	Nurse Name (Password =Train)
NEPH00	Adobo,Riley-NEPH	**CLINSTAFF00**	Adobo,Terry-CLINSTAFF
NEPH01	Aleppo,Riley-NEPH	**CLINSTAFF01**	Aleppo,Terry-CLINSTAFF
NEPH02	Allspice,Riley-NEPH	**CLINSTAFF02**	Allspice,Terry-CLINSTAFF
NEPH03	Amaretto,Riley-NEPH	**CLINSTAFF03**	Amaretto,Terry-CLINSTAFF
NEPH04	Ancho,Riley-NEPH	**CLINSTAFF04**	Ancho,Terry-CLINSTAFF
NEPH05	Aniseseed,Riley-NEPH	**CLINSTAFF05**	Aniseseed,Terry-CLINSTAFF
NEPH06	Annatto,Riley-NEPH	**CLINSTAFF06**	Annatto,Terry-CLINSTAFF
NEPH07	Arrowroot,Riley-NEPH	**CLINSTAFF07**	Arrowroot,Terry-CLINSTAFF
NEPH08	Baharat,Riley-NEPH	**CLINSTAFF08**	Baharat,Terry-CLINSTAFF
NEPH09	Basil,Riley-NEPH	**CLINSTAFF09**	Basil,Terry-CLINSTAFF
NEPH10	Bayleaf,Riley-NEPH	**CLINSTAFF10**	Bayleaf,Terry-CLINSTAFF
NEPH11	Berbere,Riley-NEPH	**CLINSTAFF11**	Berbere,Terry-CLINSTAFF
NEPH12	Birdseye,Riley-NEPH	**CLINSTAFF12**	Birdseye,Terry-CLINSTAFF
NEPH13	Blackpepper,Riley-NEPH	**CLINSTAFF13**	Blackpepper,Terry-CLINSTAFF
NEPH14	Brownsugar,Riley-NEPH	**CLINSTAFF14**	Brownsugar,Terry-CLINSTAFF
NEPH15	Cajun,Riley-NEPH	**CLINSTAFF15**	Cajun,Terry-CLINSTAFF
NEPH16	Calabrian,Riley-NEPH	**CLINSTAFF16**	Calabrian,Terry-CLINSTAFF
NEPH17	Canesugar,Riley-NEPH	**CLINSTAFF17**	Canesugar,Terry-CLINSTAFF
NEPH18	Caraway,Riley-NEPH	**CLINSTAFF18**	Caraway,Terry-CLINSTAFF
NEPH19	Cardamom,Riley-NEPH	**CLINSTAFF19**	Cardamom,Terry-CLINSTAFF
NEPH20	Cascabel,Riley-NEPH	**CLINSTAFF20**	Cascabel,Terry-CLINSTAFF
NEPH21	Cayenne,Riley-NEPH	**CLINSTAFF21**	Cayenne,Terry-CLINSTAFF
NEPH22	Celeryseed,Riley-NEPH	**CLINSTAFF22**	Celeryseed,Terry-CLINSTAFF
NEPH23	Chai,Riley-NEPH	**CLINSTAFF23**	Chai,Terry-CLINSTAFF
NEPH24	Chiledearbol,Riley-NEPH	**CLINSTAFF24**	Chiledearbol,Terry-CLINSTAFF

NEPH25	Chimichurri,Riley-NEPH	**CLINSTAFF25**	Chimichurri,Terry-CLINSTAFF
NEPH26	Chipotle,Riley-NEPH	**CLINSTAFF26**	Chipotle,Terry-CLINSTAFF
NEPH27	Chive,Riley-NEPH	**CLINSTAFF27**	Chive,Terry-CLINSTAFF
NEPH28	Cilantro,Riley-NEPH	**CLINSTAFF28**	Cilantro,Terry-CLINSTAFF
NEPH29	Cinnamon,Riley-NEPH	**CLINSTAFF29**	Cinnamon,Terry-CLINSTAFF
NEPH30	Citrus,Riley-NEPH	**CLINSTAFF30**	Citrus,Terry-CLINSTAFF
NEPH31	Clove,Riley-NEPH	**CLINSTAFF31**	Clove,Terry-CLINSTAFF
NEPH32	Cocoanib,Riley-NEPH	**CLINSTAFF32**	Cocoanib,Terry-CLINSTAFF
NEPH33	Coriander,Riley-NEPH	**CLINSTAFF33**	Coriander,Terry-CLINSTAFF
NEPH34	Cumin,Riley-NEPH	**CLINSTAFF34**	Cumin,Terry-CLINSTAFF
NEPH35	Curry,Riley-NEPH	**CLINSTAFF35**	Curry,Terry-CLINSTAFF

Each Provider and Clinical Support Staff User has a set of patients to use when playing in the playground and those patients have the same last name as the Provider or Clinical Support Staff User you log in as.

See below for an overview of what patient scenarios are available.

Please only use the patients with your login Provider or Nurse last name so other staff logging into the playground have all of their patient scenarios when they log into the playground to practice.

Provider Patients

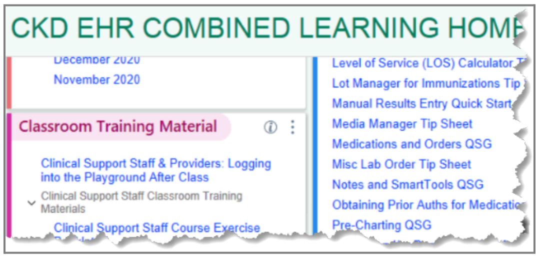
Follow Up Office Visit- Checked in **NOT** roomed	Nolan- [Login Providers Last Name]
Follow Up Office Visit- Checked in **AND** roomed	Norman- [Login Providers Last Name]
Follow Up Office Visit- **NOT** checked in **OR** roomed	Charlotte- [Login Providers Last Name]
In Basket Result Message	Chanda- [Login Providers Last Name]
In Basket Result Message	Monica-[Login Providers Last Name]
In Basket Result Message	Josie-[Login Providers Last Name]
In Basket Rx Request Message	Chanda- [Login Providers Last Name]
In Basket Rx Request Message	Janice-[Login Providers Last Name]
In Basket Rx Request Message	Josie-[Login Providers Last Name]
In Basket My Open Charts Message	Chanda-[Login Providers Last Name]
In Basket Patient Call Message	Monica-[Login Providers Last Name]
In Basket Patient Call Message	Chanda-[Login Providers Last Name]
In Basket Patient Call Message	Rose-[Login Providers Last Name]
In Basket Co-Sign Chart Message	Bethany-[Login Providers Last Name]
In Basket Co-Sign Chart Message	Becky-[Login Providers Last Name]

Clinical Staff Patients

Follow Up Office Visit	Nadir-[Login Nurses Last Name]
Injection Appointment	Neegan-[Login Nurses Last Name]
New Patient	Christy-[Login Nurses Last Name]
In Basket Result Message	Charlie-[Login Nurses Last Name]
In Basket Result Message	Millie-[Login Nurses Last Name]
In Basket Result Note Pool Message	Piper-[Login Nurses Last Name]
In Basket Rx Request Message	Charlie-[Login Nurses Last Name]
In Basket Rx Response Message	Piper-[Login Nurses Last Name]
In Basket Patient Call Pool Message	Piper-[Login Nurses Last Name]
In Basket Patient Call Message	Millie-[Login Nurses Last Name]
In Basket Patient Call Message	Roxie-[Login Nurses Last Name]
In Basket My Open Charts Message	Charlie-[Login Nurses Last Name]
In Basket My Open Encounters Message	Piper-[Login Nurses Last Name]
In Basket My Open Encounters Message	Roxie-[Login Nurses Last Name]
In Basket Pt Rx Request Pool Message	Jeannine-[Login Nurses Last Name]
In Basket Pt Advice Request Message	Roxie-[Login Nurses Last Name]
In Basket Letter Queue Pool Message	Inez-[Login Nurses Last Name]

To access all other training content for CKD EHR:

- Select the **My Dashboards** activity tab
- In the My Dashboards activity, navigate to the Combined Learning Homes Dashboard
- Access the **Classroom Training Material** component to view, save or print exercises.



Recommended LMS E-Learnings

☐ **Overview of Hyperspace in an Outpatient Setting**

- ☐ **Finding Patient Information**
- ☐ **Querying for a Patient's Outside Record**
- ☐ **Viewing a Patient's CareEverywhere Information**
- ☐ **Office Visit Demonstration**
- ☐ **Documenting a Straightforward Visit with Express Lane**
- ☐ **EpicCare Ambulatory Writing Notes for Office Visits**
- ☐ **Introduction to Patient History**
- ☐ **Introduction to the Problem List**
- ☐ **Problem-Oriented Charting**
- ☐ **Ordering in an Outpatient Context**
- ☐ **Introduction to Decision Support**
- ☐ **Introduction to Communication Workflows**
- ☐ **Wrapping Up a Visit**
- ☐ **Overview of In Basket**
- ☐ **Activating Patients for MyChart**
- ☐ **Overview of MyChart Patient Portal**
- ☐ **In Basket Following up on Results Messages**
- ☐ **Communicate with Patients about Test Results**
- ☐ **In Basket Handling Refill Requests**
- ☐ **In Basket Telephone Encounters**
- ☐ **Responding to Patient Messages**
- ☐ **Introduction to Personalization**
- ☐ **Overview of Writing Notes**

CKD EHR by Epic- ESKD/Dialysis Workflow

- Providers can document their DaVita dialysis visits in Falcon Silver (One View)

- Patient demographics will be available in Falcon Silver, from data that is entered into the DaVita Clinical Systems once a patient is registered to a provider in your practice.
- Billers can access the Falcon Silver Charge Summary Report to obtain details for monthly MCP billing.
- When your ESKD encounter is finalized in Falcon Silver, the CCDA encounter summary document will be automatically sent to your practices instance of CKD EHR for reconciliation.
  - **If the following is to occur:**

    Provider is identified as part of the patient Care Team

    Dialysis patient is registered in CKD EHR

    Demographics have to match (No MRN matching) – If demographics do not match information will not attribute to patient.

    If match occurs info will be available in the providers In Basket to view the CCDA encounter summary

    Providers would then be able to reconcile:

    - Problems
    - Medications
    - Allergies
    - Immunizations

- For non DaVita patients providers will use the dialysis center/facility EHR
  - Falcon Silver does not support documenting dialysis encounters for patients receiving care at a non- DaVita dialysis clinic.

ID Proofing to e-Prescribe

- Before you can e-Prescribe within DPS CKD EHR by Epic, Surescripts requires your identity be validated (ID Proofing) and we have partnered with Okta and Evident ID to meet this requirement.
- You will receive two emails, one from Okta and one from Evident ID, to kick off the process. This can be done from a mobile device or computer with internet access.
- Once you have verified your identity, you'll enroll a mobile device to use for two-factor authentication for login access to DPS CKD EHR by Epic.
- First you will enroll your device in Okta (This is your 2 factor authentication piece), next you will complete your ID proofing through Evident ID.
    - *Note, You will continue to utilize your current DUO (dual factor authentication) account for accessing CKD EHR by Epic.*

<u>Tips:</u>

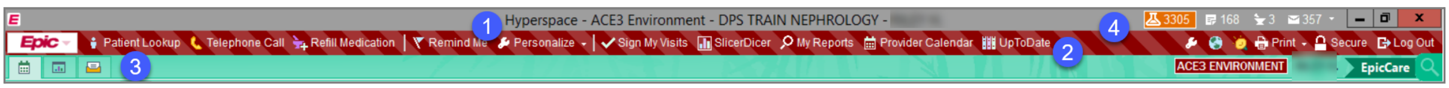
- You will be <u>unable</u> to e-Prescribe until you have completed the identification validation process!
- Please note your mobile device is required for ID and Biometrics (facial recognition) validation.
- New Provider users will receive these emails as part of their New User Request (Form or Data Collection Workbook)
- Name of the Okta app is Okta Verify **<u>not</u>** Okta Mobile

Navigation Elements

Toolbars and Hyperspace Overview

Upon logging into CKD EHR by Epic, accepting your login department and the Message of the Day, the Multi-Provider Schedule is your start-up activity.

- Acknowledge the **What's New** pop up. You can re-visit this pop-up box for updates to the system on your own time in PLY.
- For now, we will select **Remind me Later** to move on
- The **Multi-Provider Schedule** is an activity tab that stays available for you no matter what you are doing in Epic.



Additionally you will have access to both the In Basket and Dashboards activities from the home workspace tabs.

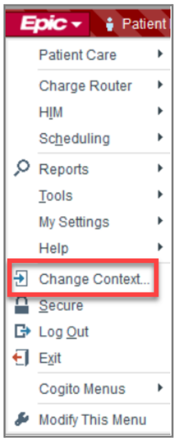
1. **<u>Title Bar</u>**- This gray bar tells you which environment, department and the user you are logged into/as. At the far right of the Toolbar, you will see the In Basket widget. This widget tells you what kinds of In Basket messages you have in live time and when selected, this will take you to your In Basket and the applicable folder.

BACKPOCKET

'**Change Context'** under your Epic Drop Down Menu to the far left will allow you to switch practice locations, also known as Departments, without having to fully exit out of Hyperspace.

2. **<u>Epic Hyperspace Toolbar</u>**- This will be BLUE in the PRD environment that you will be working in when at the Hospital/Clinic.

   This toolbar houses your Epic drop down options, as well as your quick start buttons for the most common tasks that you may perform.

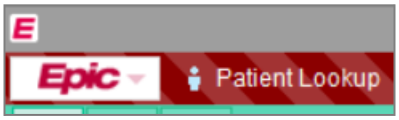


3. **<u>Workspace Tabs</u>**- These tabs are for the 3 main elements of your workflows. You have your Multi Provider Schedule Tab, your In Basket Tab and your Dashboards Tab.

4. **<u>Secure/Logout Buttons</u>**- Use this button to secure this session or to log out entirely. Secure would be used, for instance, if you wanted to stay within the Patients chart but needed to allow another user to login to that same chart for their documentation.
   MA's that room Patients use this function quite a bit to allow the Provider to immediately be at the same spot within the Patients chart as soon as they log into the session.

As you move around the Epic home screen, you will notice that when you hover your mouse pointer over icons, a new little box appears. This tells you the name of the icon/what that icon does! We call this '**Hover to Discover**'.

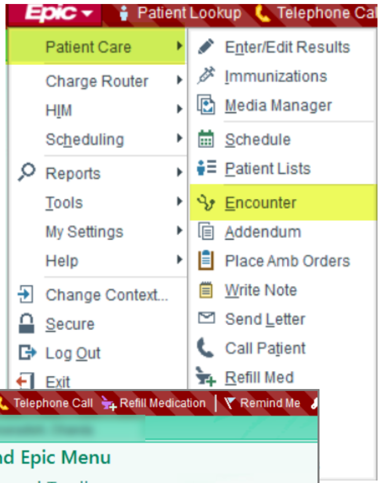
To access a Patients chart, select them from your schedule.



If the Patient whose chart you want to open is NOT on your schedule, you will need to use the '**Patient Lookup**' button at the top left in the Epic Hyperspace Toolbar next to the Epic Dropdown Button.

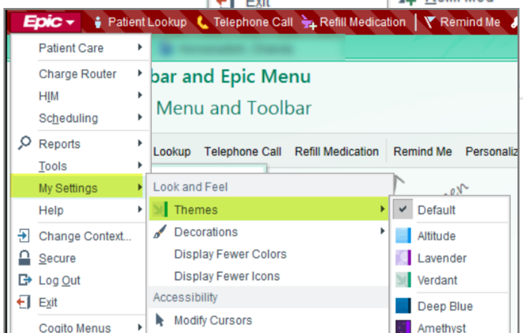
Let's take a look at the other buttons available for you within the homescreen!

Epic Drop Down Button



At the top roght of your screen, you will see an Epic Button with a drop down arrow next to it. This is your Epic Menu. You can access quite a few other activities from this button. Below are just a few of the most commonly used tasks,

1. **Patient Care**- For Instance, if you wanted to create a new Encounter, you can click right to that task from the Epic Drop Down Arrow.



2. **My Settings**- You can set your own custom settings here. For instance, you can modify your

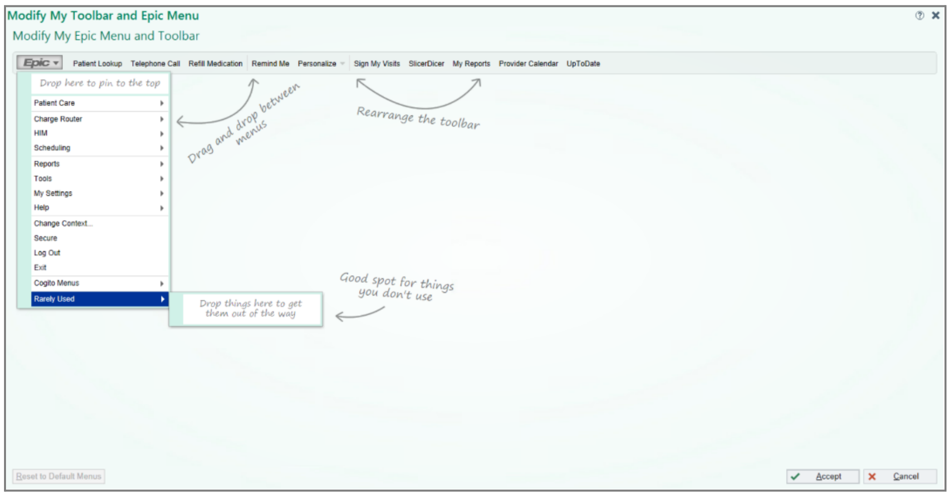
color themes and Decorations as well as your cursors.

3. **Change Context**- Use this to change your log in location to another Department, or to see another Department's schedule

4. **Secure**- Used to 'Lock' a session for either a later login, or for another User to jump into that instance.

5. **Log Out**- Use this to completely Log Out of the system.

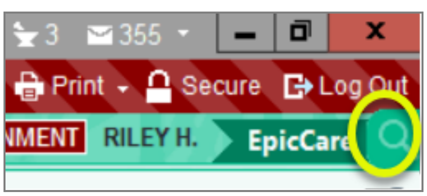
6. **Modify This Menu**- This will take you to a screen that allows you to customize what you see in your toolbars and your Epic menu.

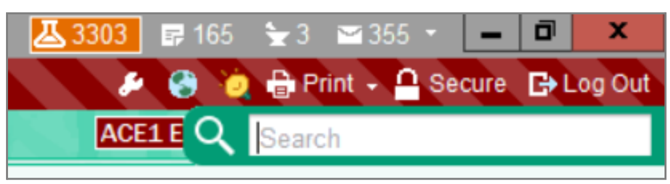


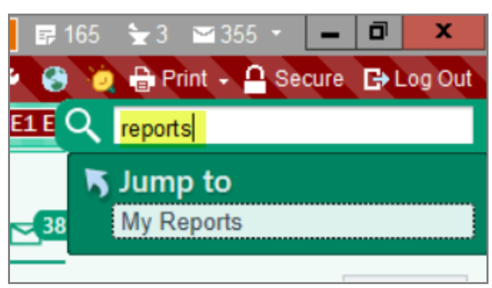
Epic Chart Search

A great feature within CKD EHR by Epic is the ability to search the program. If you are NOT within a Patients chart, this function will allow you to find different activities quickly without having to browse around.

To access this functionality, at the far right of the screen, you will see a magnifying glass. Select this icon and a full Search Banner will appear.







For instance, if you wanted to find the reports function, you could search '**reports**' and select '**My Reports**' from the populated list

BACKPOCKET	
	Epic Search will only show you the activities that you have Security access to! What this means is that another User may see more options than you would see

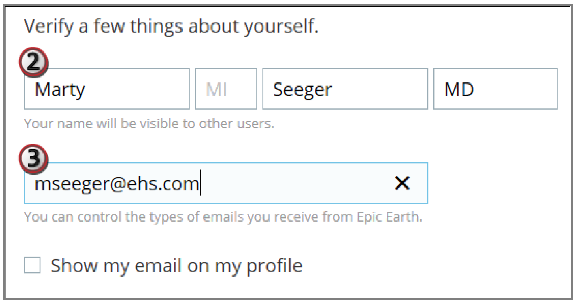
Epic Earth

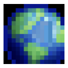
At the top of your screen, to the far right, you will see an Earth Icon. This is your link to Epic Earth.

- Become part of the community on Epic Earth to collaborate with other clinicians across the country and across the globe.
- Explore innovative ideas related to your practice, learn new tips, and share your perspective to become part of the discussion.
- Discover **i**nnovative ideas from the best hospitals, clinics, and providers are waiting for you. Pick the tags that interest you to personalize your home page and dive into the topics that you care about the most.

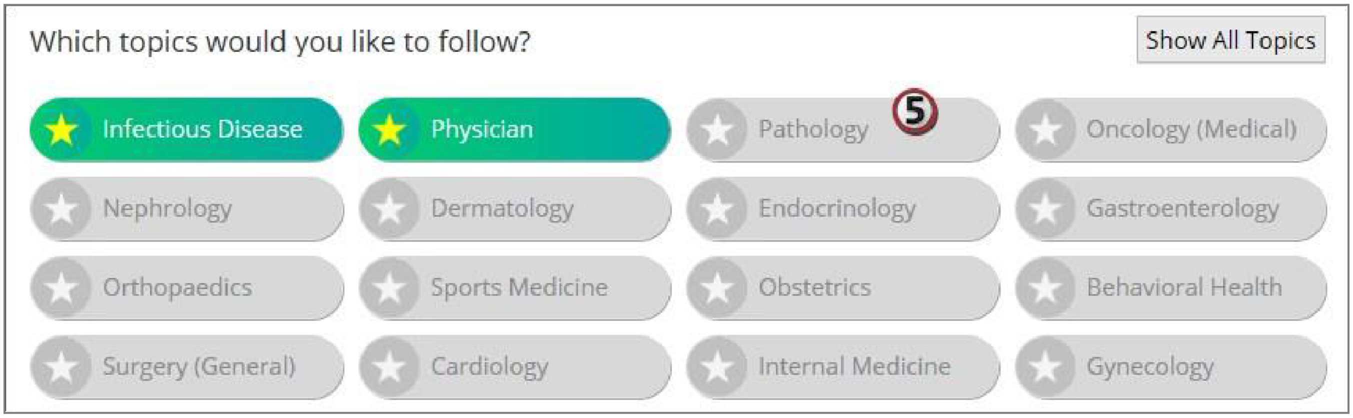
- Find the latest features and hottest tips to improve patient care and clinician efficiency.
- Read success stories and recommendations about top Epic programs at leading organizations.
- Connect with thousands of users from all areas of healthcare that are working together to enhance the patient experience, build better tools, and improve outcomes.
- Find your peers, follow the experts, and ask the community to help you solve the biggest problems and smallest inconveniences.
- Connect from Hyperspace, home, or your mobile device.
- Share your opinions, research, and experiences to fuel the discussion.
- Post articles, leave comments, and share stories that can help others with their patients and their practice.

Create a Profile



1. Click on the globe  on the far right side of your Hyperspace toolbar to open Epic Earth.
2. Review your name and credentials. These appear to others on Epic Earth, so make any necessary updates.
3. Update your email address if needed. Epic Earth sends email updates to this address, and you'll be able to log in right from those emails.
4. Adjust your role and specialty if needed.

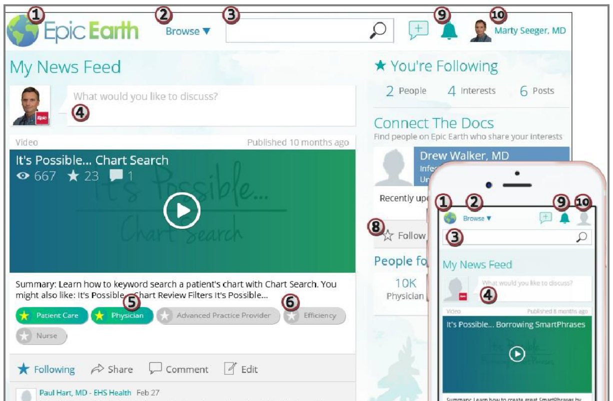
5. To put the most relevant articles, talks, and discussion front and center on your newsfeed, select the topics you're most interested in. We've suggested some for you - click a selected topic if it's not relevant.



Explore and engage with the community

Use the images below to orient yourself to the Epic Earth site on both your workstation and your mobile device.

1. Click here to jump to your news feed at any time.
2. Use this menu to browse articles, discussions, videos, and more.
3. Search for people, topics, or keywords to find content that interests you.
4. Start a new discussion here. Tag it with relevant topics so it shows up for the right people.
5. Click the name of a topic to jump to related posts.
6. Click the star for a topic you're not already following to start seeing related content in your news feed.
7. Comment on an existing discussion.

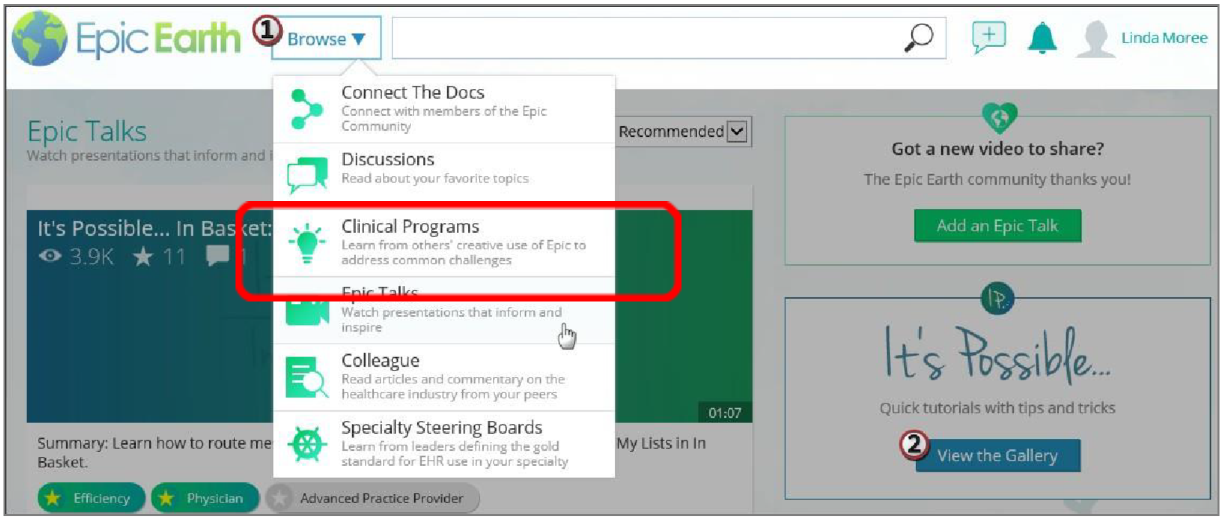


8. Follow someone to see their posts in your news feed.
9. View your notifications.
10. Update your profile and email preferences.

Learn what's possible in Epic

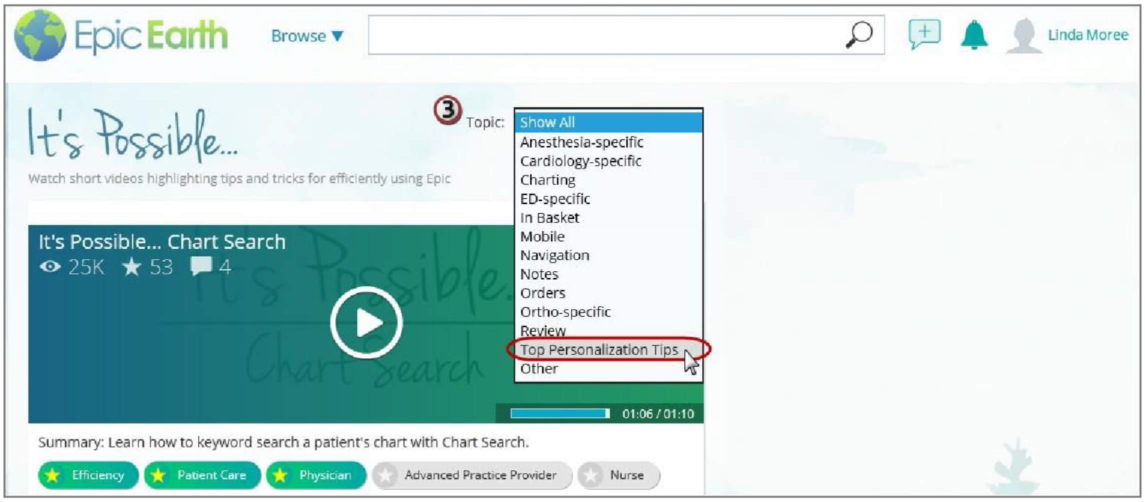
Visit the Epic Talks page to watch videos from your colleagues and from Epic. There are over 100 Epic- produced *It's Possible* videos that provide efficiency tips, share personalization tools, and give you a tour of new features - all in under 90 seconds.

1. After you've logged in to Epic Earth, click **Browse** at the top of the screen and select **Epic Talks**.



2. Click **View the Gallery** at the right to jump to a page that includes all the ***It's Possible* videos.**

3. Scroll through the videos, or select a relevant area from the **Topic** list. To focus on the highest impact personalization tips, select **Top Personalization Tips.**



Watch It's Possible Videos on Your Mobile Device

If you use Haiku or Canto, you can browse the It's Possible video library right from your mobile device.

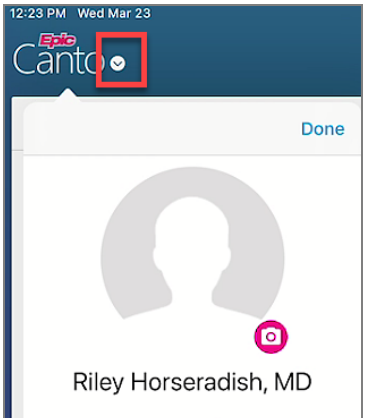
1. On your mobile device, open the Haiku or Canto app.

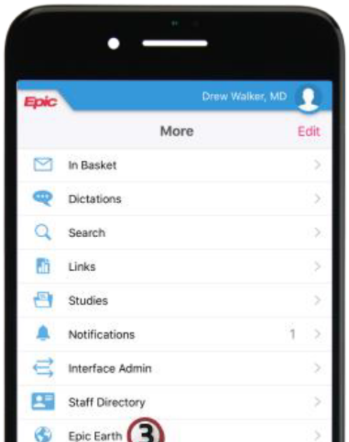
2. **<u>Canto</u>**- Tap the Drop down arrow after the Epic Title

3. **<u>Haiku-</u>** Tap the '**More**' button on the bottom right

4. Tap the **Epic Earth** option.

5. Browse and watch available videos, sorted by category.

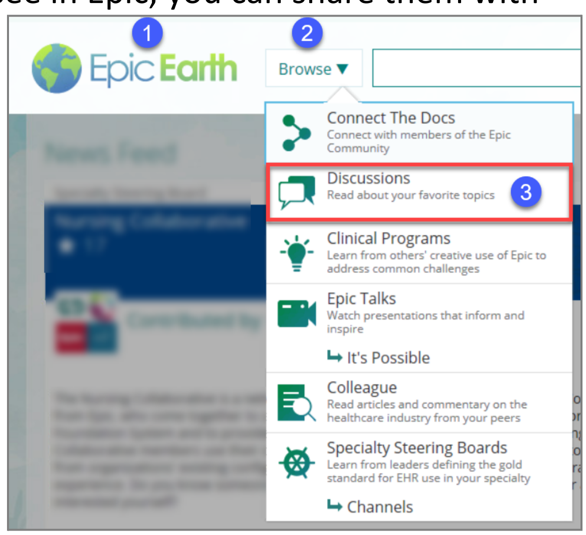




Join a Specialty Discussion Group

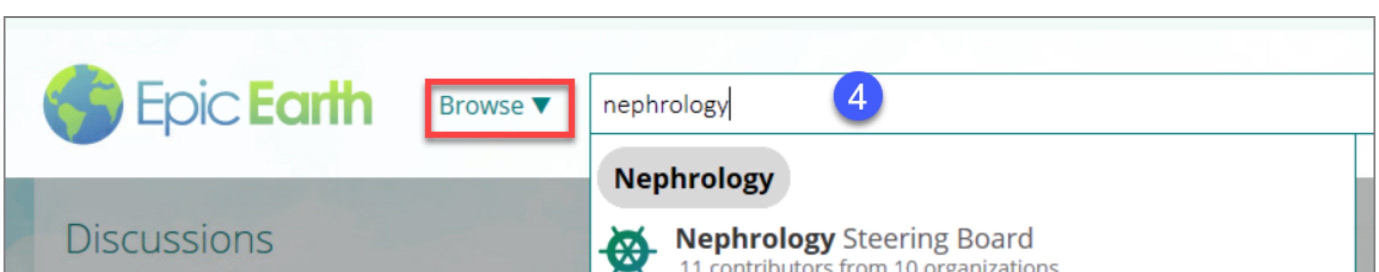
If you want to contribute to your specialty's conversation or simply see what others are saying about your specialty, you can join your specialty's discussion group in the Discussions module in Epic Earth.

Similarly, if you have ideas for specialty tools you'd like to see in Epic, you can share them with your peers who are on the Think Tanks and Steering Board in the Discussions module.



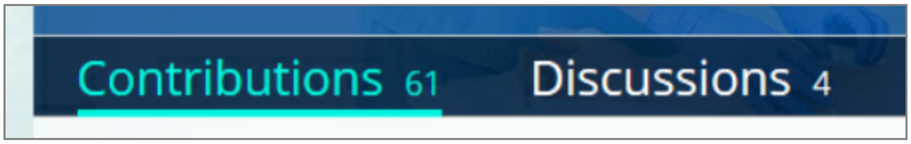
1. Log into Epic Earth
2. Select '**Browse**'
3. Select '**Discussions**'
4. Once in Discussions, click '**Browse**' again and type

in



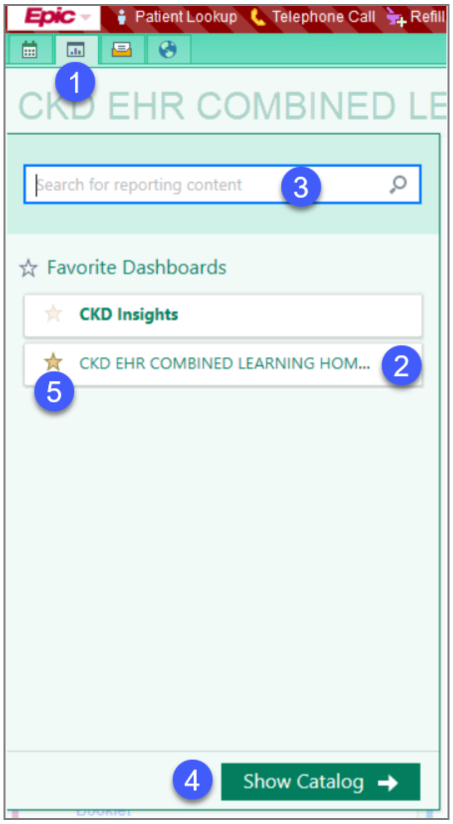
the topic you are looking for

5. Navigate to wherever you would like to read or participate



Dashboards

Learning Homes/Combined Learning Homes Dashboards



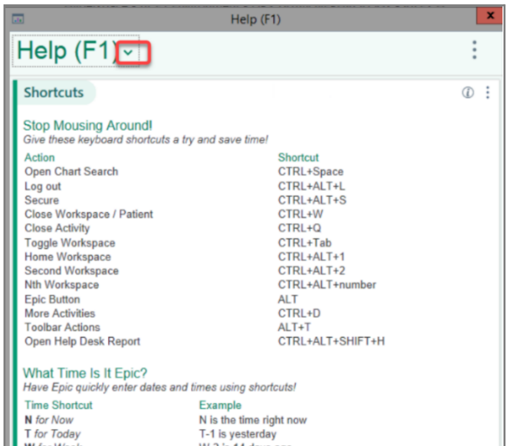
1. Your default favorite dashboard appears when you log in and toggle to the **My Dashboards** Work Space Tab, which is now **CKD Insights** for Providers.

2. You can access other available dashboards by clicking the name of the dashboard, such as **CKD EHR Combined Learning Home**, and selecting another favorited dashboard.

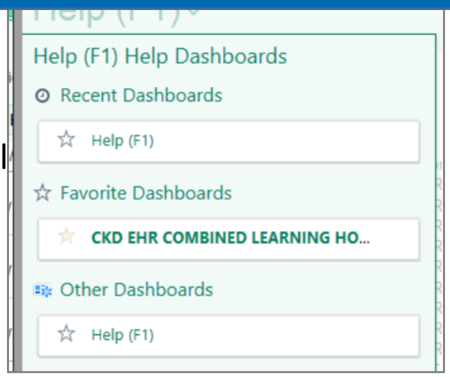
3. If you want to search for additional dashboards, type the name of the dashboard in the search bar.

4. Click **Show Catalog** to browse the full list.

5. **Favorite** dashboards for easy access later by clicking the star to highlight it yellow. To make a favorited dashboard your default dashboard, drag it to the top of the list. Also, by marking a dashboard as a favorite, it will now be accessible using the F1 key!

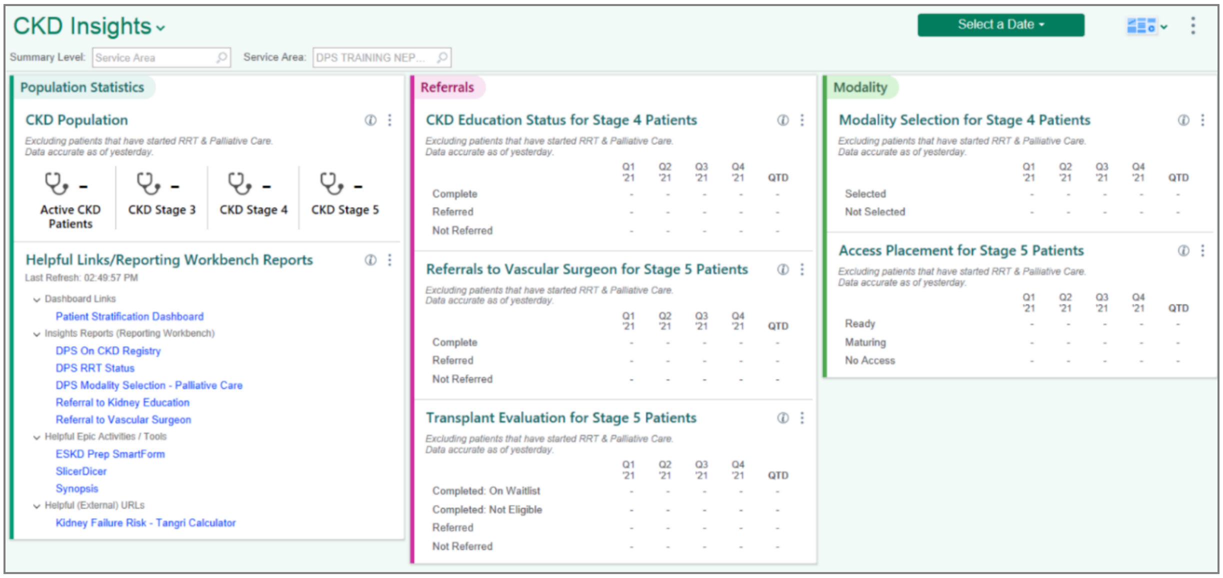


6. It’s always easy to pull up the LHD using the **F1 key**, which will dashboards and also let you access a Hyperspace Help menu
7. Use F1 (or Fn key + F1 depending on your keyboard) which will
8. Select dropdown arrow near Help name and point out Help menu under Other Dashboards



CKD Insights Dashboard

This is the default Dashboard for all Providers.



Data updated within the ESKD prep form sends information to the CKD Insights dashboard. The CKD Insights dashboard contains Population Statistics, Referrals and Modality.
Additionally you will see a link to Patient Stratification Dashboard as well as Additional Helpful Epic Activities and Tools.
The Insights Dashboard presents your patient population management metrics and allows for you to see the segmentation of your patients by CKD stage, and easily view the activities that have *and* can occur.

The key activities we are tracking are:

1. Patient stratification by CKD stages 3 through 5

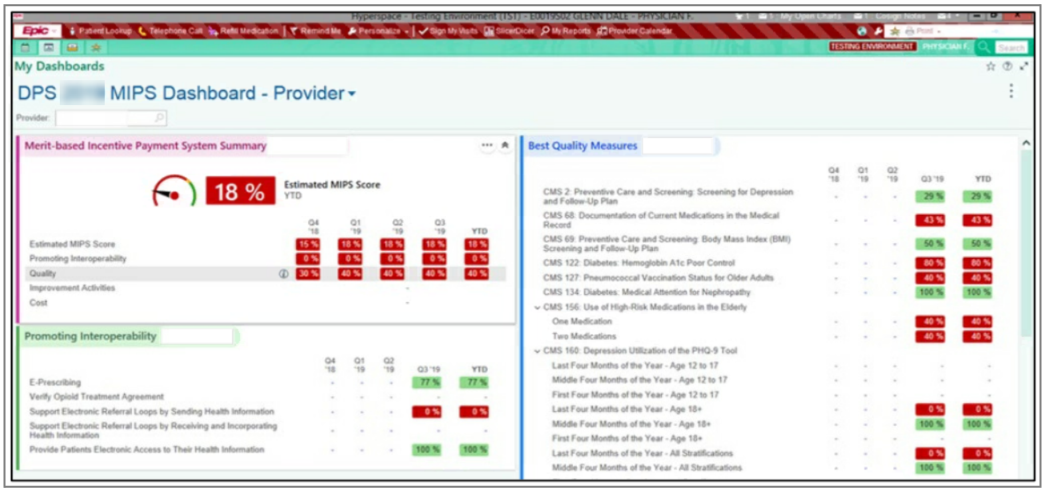
2. Referrals to CKD education, vascular surgeons, and transplant evaluations
3. Your patient population with CKD stage 4 and their modality selection
4. And your patients with CKD stage 5 and the status of their access site.

When ESKD preparation data is entered for your patients, we aggregate all that data *here* to provide you with a high-level view of your patients that are prepared for an optimal start, and those that are not

MIPS Dashboard

The CKD EHR by Epic MIPS dashboards are available for providers, practice managers and clinical staff.

To view these dashboards and add them to your favorite list, simply select the dashboard icon Work Space Tab on the top left hand side of your screen.



The MIPS Dashboard helps clinicians and practice managers see how each provider, by TIN/NPI is performing on MIPS metrics.

Providers, practice managers and other staff at your organization who are responsible for overseeing MIPS reporting can use the Dashboard to track eligible clinicians' progress on MIPS measures.

They can use the dashboard to see at a glance how providers are performing on measures for each initiative and identify areas for improvement.

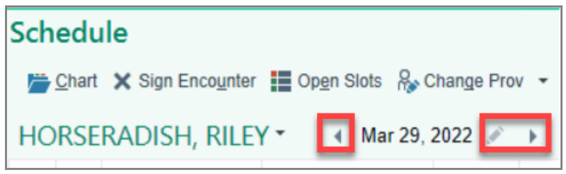
Users can also select a summary level and narrow down on performance rates.

If you use this report to monitor quality measures for MIPS, please note that the report does not necessarily reflect your quality category score because it does not incorporate the quality category benchmarks.
Your total estimated score also does not factor Improvement Activity or Cost as those items are not discretely tracked in the system.

Multi Provider Schedule

Your default view when logging into the system is your Schedule. This is called the Multi Provider Schedule.

From this page, you can see appointments for today, in the past as well as in the future.

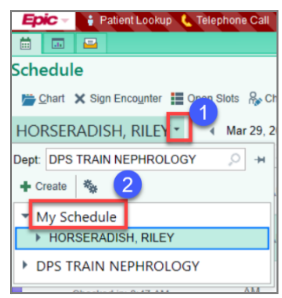


To see your schedule for a different day, simply select the arrows pointing the direction you want to see, or click the pencil Icon!

Changing the Schedule Views

Customize your schedule to see the patient information you find most useful. Consider adding or removing columns and changing the order in which they appear to suit your personal preferences.

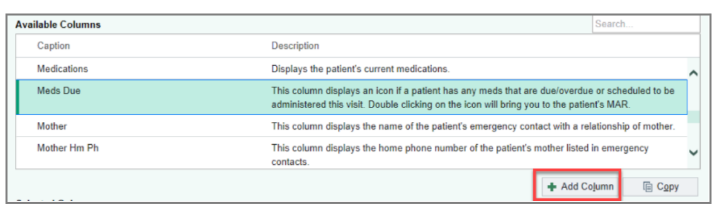
1. Go to your schedule. Click the drop down arrow in the header that shows your name and then select a schedule under the **My Schedule** group



2. Click  above the folder list to customize your schedule

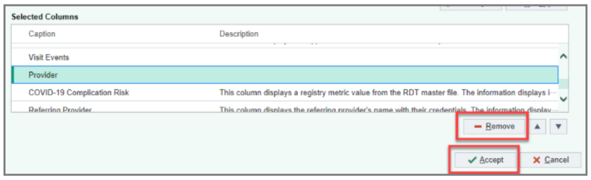
   a. To reorder your columns, select one from the '**Selected Columns'** list and click to move it

   b. **<u>To add a column</u>**, select it from the '**Available Columns'** list and click '**Add Column'**. For example, select the '**Meds Due'** column to see whether



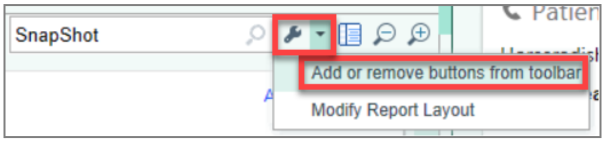
the patient has a medication due, or select the **'Referring'** column to see the referring provider for the visit

c. **<u>To remove a column</u>**, select it from the **Selected Columns** list and click **Remove**. For example, remove the **Provider** column if your schedule lists only your visits

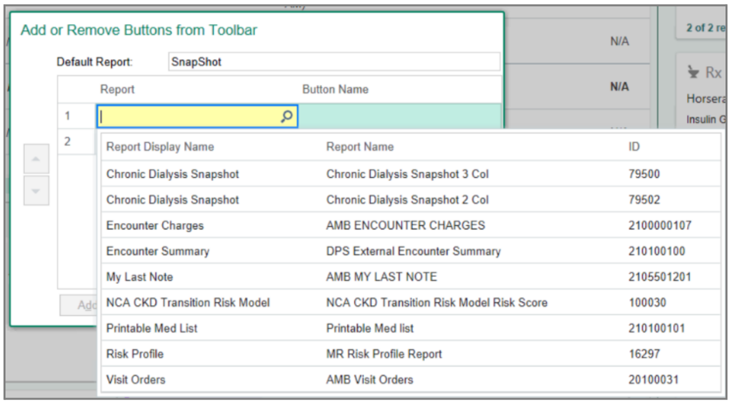


Putting Key Reports on Your Schedule

1. Click the wrench on the right side of the report toolbar and select '**Add or remove buttons from toolbar**'



2. In the **Report** field, enter the report that you want to appear as a button on the toolbar, or select the magnifying glass and scroll down to see all the options available to you!



3. In the **Button Name** field, enter a brief name, so more buttons can fit on the toolbar.

4. Continue to add reports as needed.

5. Click ▲ and ▼ to change the order in which the buttons appear on the toolbar.

- Click **Accept** to add the buttons to your toolbar

BACKPOCKET

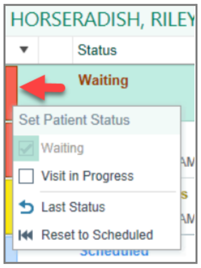
Some examples of reports you might want to include here are:

- **Printable Med List**: Shows that Petients medication list in a printer friendly format
- **My Last Note**: Shows your last note for a patient, so you can review it before you go into the room
- **NCA CKD Transition Risk Model**: Shows the Patients Tangri Score

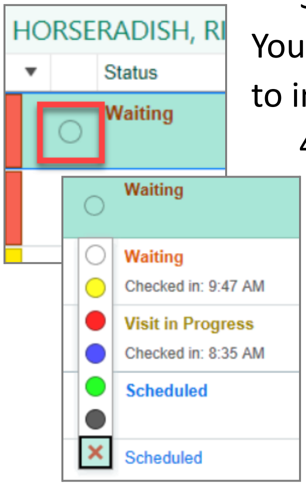
Updating a Patients Status on your Schedule

View the color-coded status of each patient from the schedule and update the patient status as needed by clicking the color bar.

In addition to tracking patient status, colored dots can be used to signify additional patient needs. For example, a blue dot appears on the schedule when follow up is needed for a patient, such as administering a vaccine.



1. Click the color bar to the left of the appointment you want to update and select a status for this appointment
2. Certain patient statuses also update automatically based on documentation within the chart

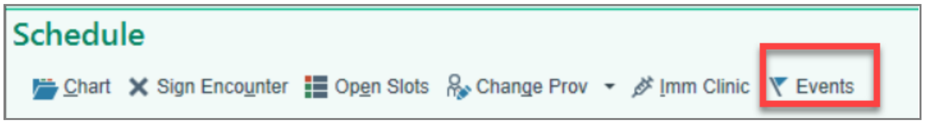


3. Colored dots indicate additional patient needs

You can click in the column to add a dot, or a dot can appear there automatically to indicate patient follow up is needed, such as when a vaccine is ordered

4. To change or remove a dot, click the dot and choose another option

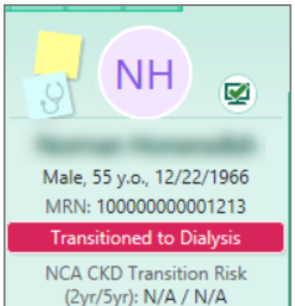
5. Go to the '**Events**' icon at the top of your screen and select the appropriate information, then click '**Close**'



Navigating Within a Patients Chart

Patient Storyboard

When you open a Patients chart, you will see that there is a long grouping of information on the left side of your screen. This is called the **Storyboard**!

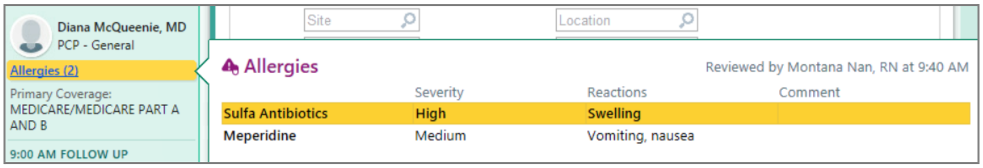


Think of this like the story of your Patient in an easy to see, and interact with, Activity.

The Storyboard is full of clickable Hyperlinks that will take you to the area that you are looking at for more information.

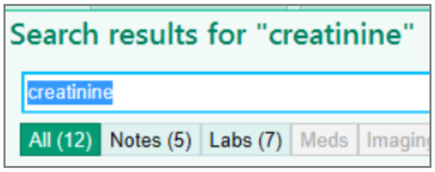
For instance, if you hovered your mouse over the '**Allergies**' callout banner, you will see the list of the documented Patient Allergies in a pop up window without having to go to that Activity.

Let's take a deeper dive into the '**Search**' field within the Storyboard!



Search will allow you to quickly find anything within that Patients chart that conatins the word(s) that you type into that field.

For instance, if you were curious what this Patients last Creatinine was, you can type CREATININE in this box and CKD EHR by Epic will show you anything in the chart that has that word. This includes, progress notes, labs, alerts, messages etc…



found 5 Notes and 7 Labs.

Total is 12 instances that contain the word creatinine.

Tangri 4 Model

The Tangri 4 Model is a risk prediction algorithm that uses age, gender, urinary albumin, and eGFR to predict the 2 and 5 year risk of progression to an end stage renal disease (as a percentage).

It has been proven, through large data sets, to allow physicians to identify their patients at highest risk for developing the need for renal replacement therapy.

The predictions from this algorithm are one tool to help shape the care of patients with risk factors for the progression of kidney disease.

External Hyperlinks

http://kidneyfailurerisk.com/

Additionally, an Abstract of the research publication can be found at:

https://www.ncbi.nlm.nih.gov/pmc/articles/PMC5406122/

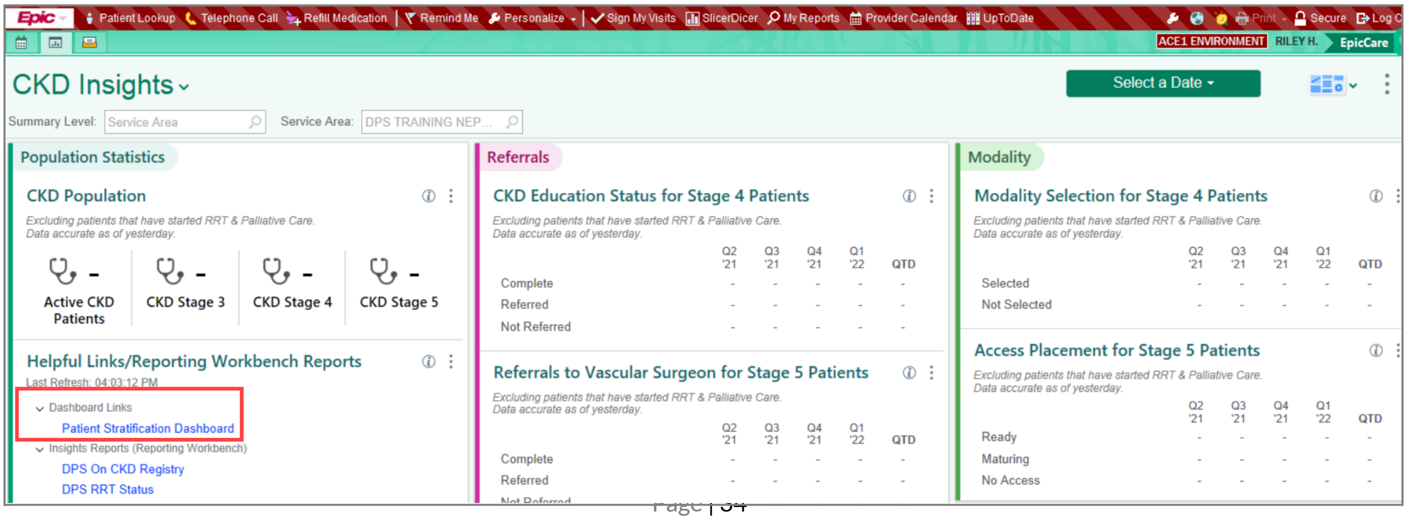
Pulling the Patient Stratification Report

There are 3 different places that Users can access the Patient Stratification Report. We will cover all 3 ways below:

1. CKD Insights Dashboard
2. CKCC Dashboard
3. My Reports

CKD Insights Dashboard Patient Stratification Report

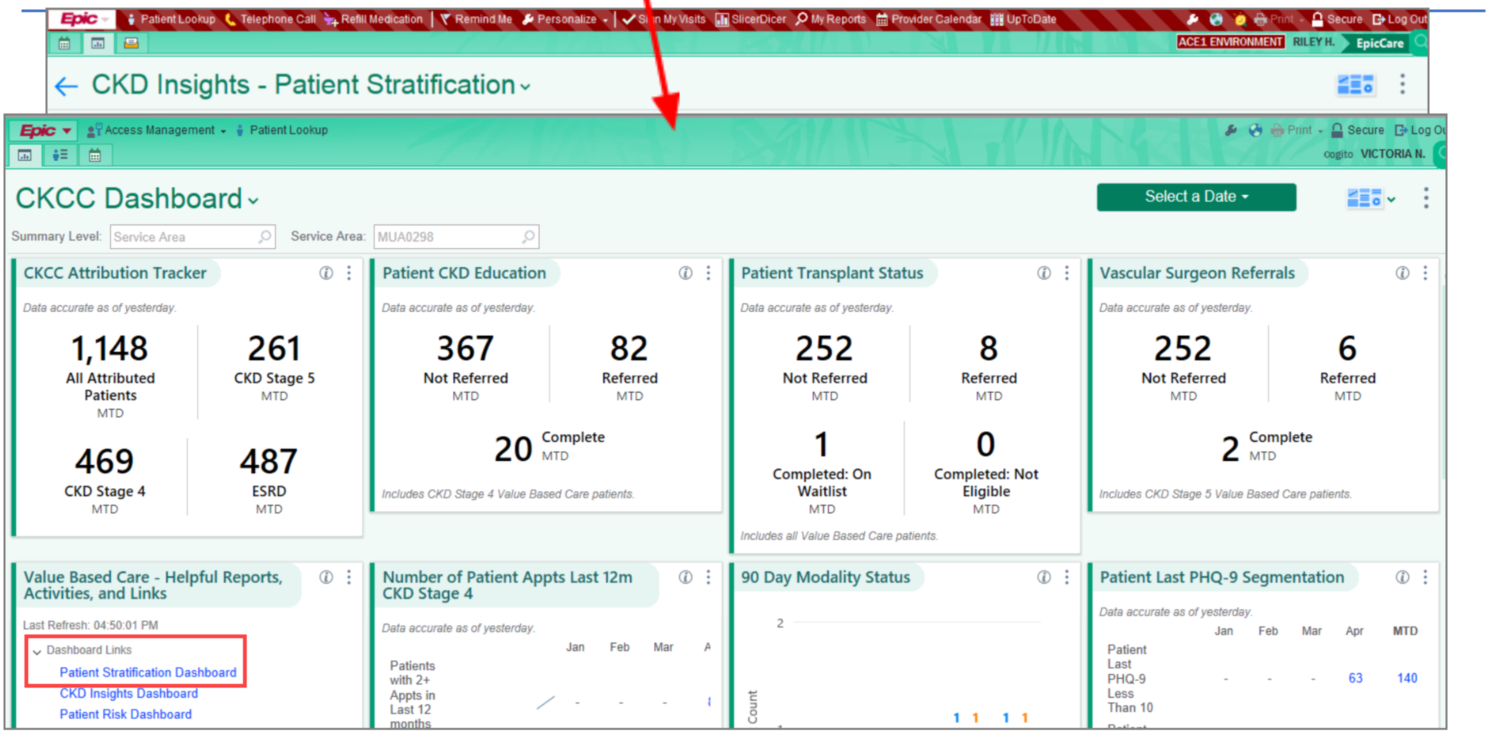
1. Navigate to your CKD Insights Dashboard and select the '**Patient Stratification Dashboard**'



2. In this next screen, click on the greyed out **PLAY BUTTON** to run that specific report.

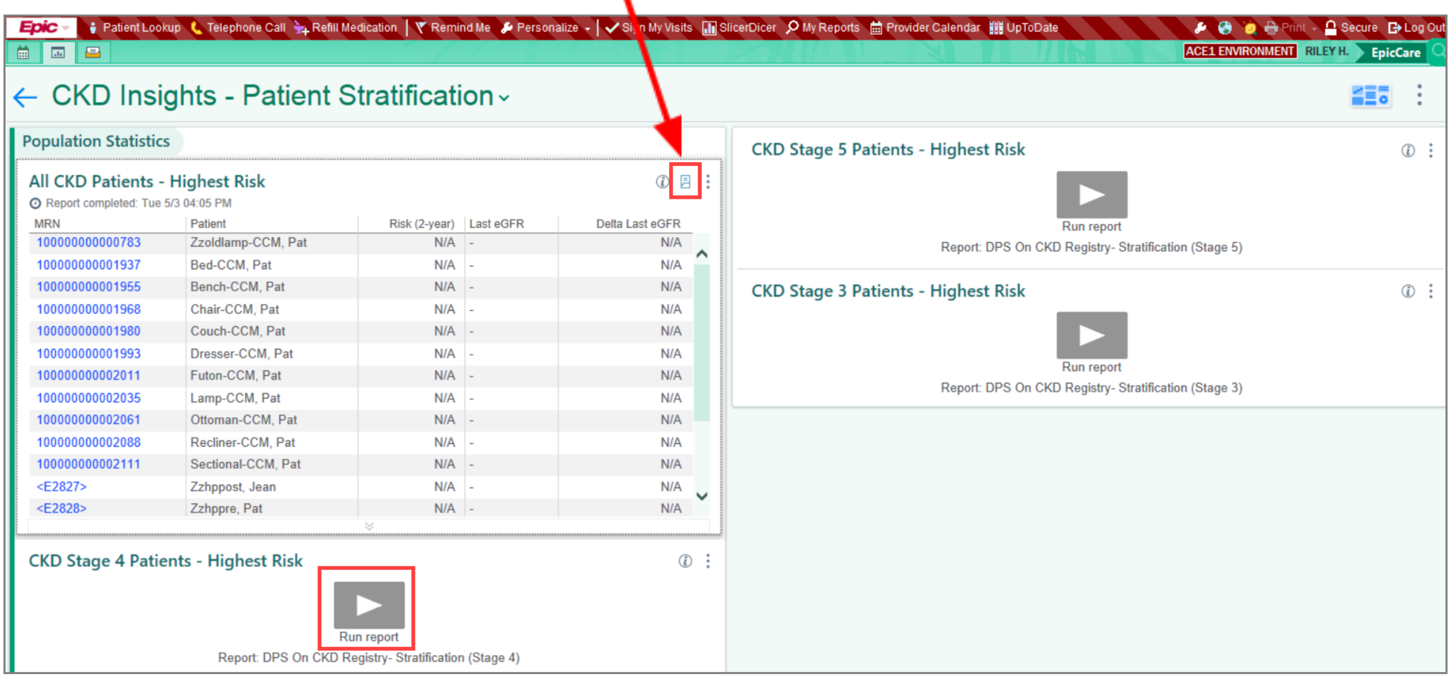
   You can also select the little report Icon up above to see this information in My Reports

CKCC Dashboard Patient Stratification Report



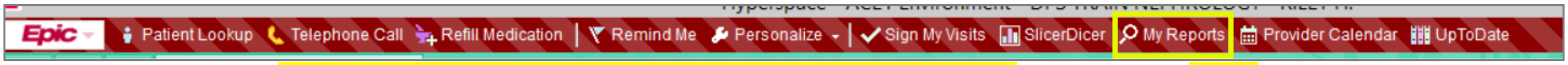
1. Navigate to your CKCC Dashboard and select the '**Patient Stratification Dashboard'**

2. In this next screen, click on the greyed out **PLAY BUTTON** to run that specific report.
   You can also select the little report Icon up above to see this information in My Reports

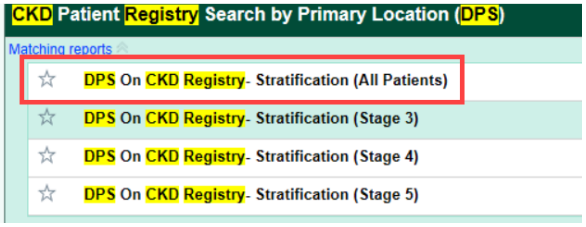


My Reports Patient Stratification Report

1. Navigate to **'My Reports'** up at the top in the Epic Hyperspace Toolbar



2. Search for **DPS On CKD Registry- Stratification (All Patients)** **and select RUN**



REMINDER

Don't forget to **STAR** this report to save it to your favorites!

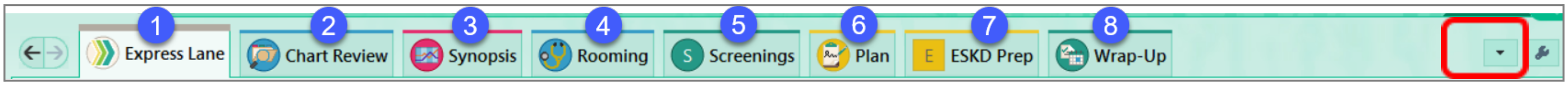
Metrics

CKD Stage	Recommended Model	Low	Intermediate	High
CKD 3	Tangri- 5 year	0-4.9%	5.0-14.9%	15.0% <=
CKD 4	Tangri- 2 year	0-9.9%	10.0-19.9%	20.0% <=
CKD 5	N/A	N/A	N/A	All Patients

CKD Stage- Description	CKD Stage- Number	GFR Reading
None or Slight	CKD 1	>90 ml/min
Mild	CKD 2	89-60 ml/min
Moderate	CKD 3	59-30 ml/min
Severe	CKD 4	29-15 ml/min
Approaching Failure	CKD 5	<15 ml/min

Activity Tabs

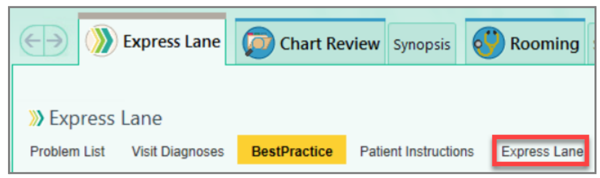
To the right of the storyboard, you will see quite a few large Tabs at the top of your screen. These tabs are called '**Activity Tabs**' and represent the different areas that you can navigate to within the Patients chart.



Express Lane

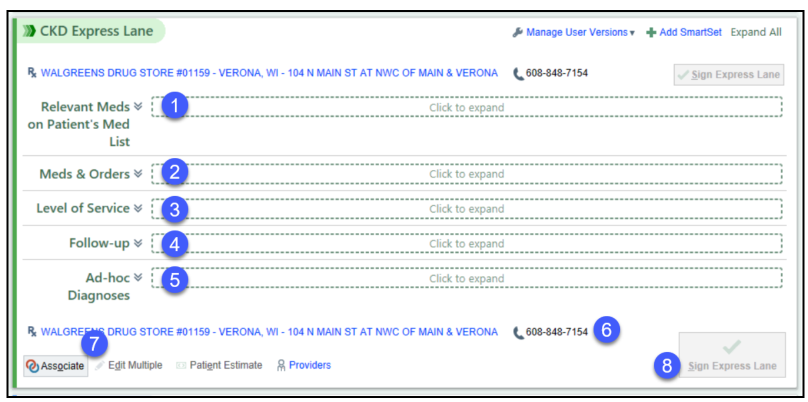
The Express Lane functionality in CKD EHR by Epic had been custom created to allow for faster and more thorough charting for our Nephrology practices.

This Activity includes the Plan and Wrap Up activities all within one work space.



Selecting the secondary Express Lane link will take you to more charting sections. Here you will find:

1. Relevant Meds on Patients Med List
2. Meds and Orders
3. Level of Service
4. Follow Up
5. Ad Hoc Diagnosis
6. Patients Pharmacy
7. Associating a Diagnosis
8. Sign the Express Lane

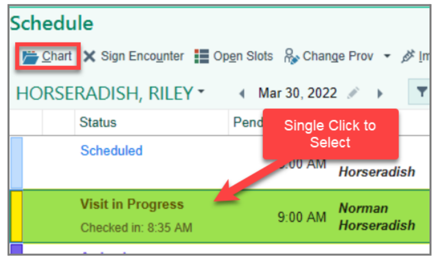


HYPERLINK

See '[Documenting a Visit Using the Express Lane](#)' section of this manual for more information!

Chart Review

To browse information about past visits, progress notes, imaging, letters, and more, open the Chart Review activity.



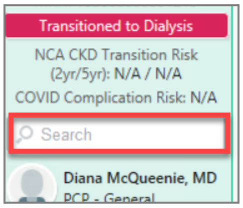
- From your schedule, select the patient whose chart you want to review and click '**Chart**' up above in the schedule tool bar
  - o If you're already in a patient encounter, select the Chart Review Activity tab.
- To view past visits and other encounters, like telephone calls, select the Encounters tab. All of the patient's visits appear in a list, organized by date.

BACKPOCKET

Can't find the visit you're looking for?

- Select a check box at the top of the tab to see only a subset of the data. For example, on the Encounters tab, select the '**Me**' check box to see only visits with you.
- Click the Filters icon to narrow down the list using other criteria. Choose to see only office visits with a certain diagnosis, for example.
- Click a column header to sort the list by that information.

- Select a row to see a summary of the encounter in the preview pane
  - o Click Preview if the report doesn't appear
  - o Use the links in the report to get to more detailed information. Hover over certain links, like those in the Orders Placed section, to see more info
  - o To add or update information in an encounter, click Encounter. If the encounter has already been closed, you'll be prompted to create an addendum
- Select another tab, such as Meds, depending on the type of information you want to review
- If you're looking for something specific, or just want to see information that's relevant to a certain condition, save yourself some clicks and **search the chart located within the Patient's Storyboard**!



For example, search for ‘hypertension’ to see problems, clinical notes, medications and other orders related to that condition.

- Within a patient's chart, enter a keyword in the Search field at the top of the Patient’s Storyboard and press ‘**Enter**’
    - Results appear organized by date in the Search tab of the sidebar, so you can get an idea of the history!

BACKPOCKET

Press **CTRL + SPACEBAR** to quickly move your cursor to the Search field

- Hover over a search result to see more info. For example, hover over a medication to see its history, hover over a problem to see relevant meds and labs and hover over a note to see relevant snippets.
    - If necessary, click a search result to open a full report

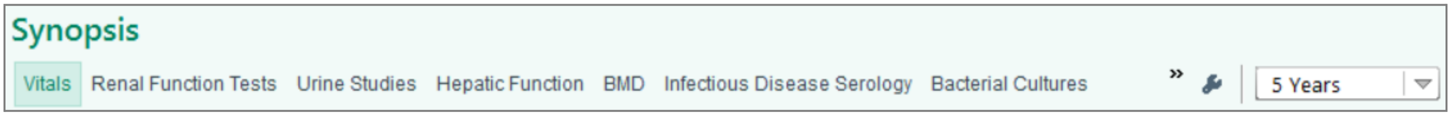
- If you get too many results, narrow them down using the filter buttons at the top.
    - For example, click ‘**Meds’** to see only the patient's medications related to hypertension.
    - You can also filter the search results to quickly find relevant notes, labs, imaging, and more
    - Click ‘**All’** to clear your filter

Synopsis

Synopsis is a powerful tool which allows users to display trending data (e.g. lab results, medications, vitals etc.) and the data can be incorporated in your patient’s encounter.

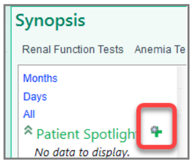
With your valuable feedback, we have added roughly 1,000 result components to Synopsis.

What this means for you is that MORE results flow into Synopsis which means a more robust experience with more trendable data!



- Synopsis graphs results against other items like vitals, medications or procedures.

- Used to display trending data (e.g. lab results, medications, vitals etc.) and the data can be easily incorporated in a patients encounter.
- We have added roughly 1,000 result components to Synopsis, updated the 'Default' view and prioritizing the lab results that are most important to you!
- There are various Synopsis views to choose from located across the top of the activity.
- Defaults to Vitals.
- Grouped panels on separate tabs.
  - o Upon selecting the tab, the initial panel will be displayed and the remainder of panels will be collapsed. You may expand as needed.
  - o You have an all view located at the end.
  - o You can change the order via the filter using the wrench.
  - o Patient Spotlight + Allows users to select additional labs for view on their patient.
  - **o** You can trend medications with Labs
  - **o** We can select check boxes to graph several lab results, medication and/or vitals. **(ex. Up to 4 values)**
- Select the +green icon for Patient Spotlight to add additional LABS that **you want to be pulled into your note.**

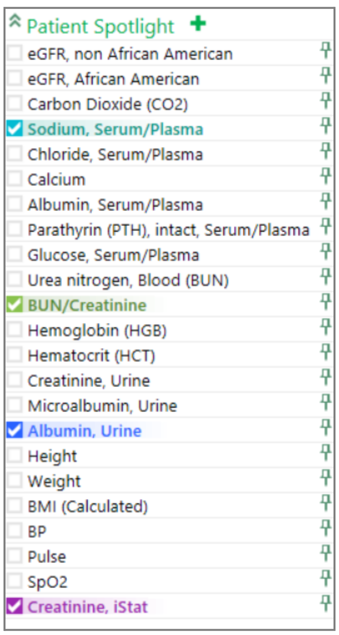


- Only data that is in the Patient Spotlight will pull into your note automatically.
- Click to select the **Patient Spotlight** labs that you would like to see on the graph to the right.
- Hover over points or the medication to trend with labs.

BACKPOCKET

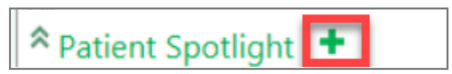
Right click on the graph to show COPY and PRINT options. If you choose to COPY, you will copy in the discreet data points and can PASTE them into another field, like your note!

Action Steps:

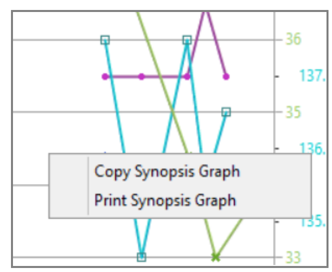


1. Select the Panel you would like to use
2. Set your time frame (the box to  the right)

3. Select the data you would like in the Patient Spotlight by clicking the green arrow (Choose up to 4) **OR** selecting the options that are pre-populated with the most common labs for CKD

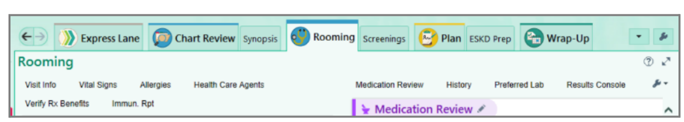


1. Copy or print the results from the graph to the right! (Remember, right click anywhere in the graph to get the copy or print option!)



Rooming

Depending on your Practice's policies, the '**Rooming**' Activity Tab is usually completed by Nurses or MA's prior to the Provider entering the room.



The data collected here will populate throughout the system to show the most recent information for that Patient.

Patient Information collected:

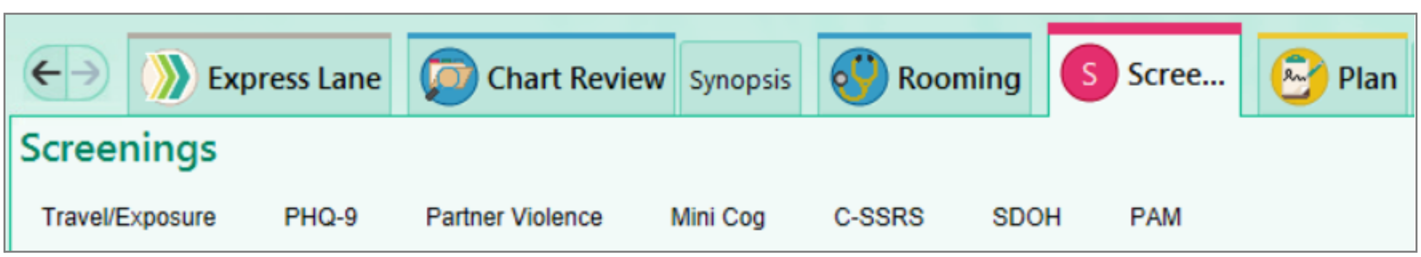
- **Visit Info**- Houses the Reason for Visit/Chief Complaint and shows a widget with the last few recent visits with you
- **Vital Signs**- Patient's Vital signs are documented here
- **Allergies**- Patient's Medication/Procedure and general allergies are listed here
- **Health Care Agents**- Shows the Health Care Agents authorized for the Patient
- **Verify RX Benefits**- Will show here if the Pateint has Insurance that has had the Pharmacy Benefits verified by the Front Desk or Responsible Staff Member
- **Immun Rpt**- Immunization Summary report shows the Patient's Vaccine History
- **Medication Review**- review all current medications as well as add Patient reported Medications
- **History**- Medical, Surgical and Family History Data. Also has Tobacco/Vaping, Alcohol, Drug and Substance use, as well as Social Documentation elements
- **FYI- IMPORTANT**

If the '**Preferred Lab'** field does NOT have any information, you will be required to add the agency manually for EACH lab ordered!

- **Preferred Lab**- Shows the Patient's preferred Resulting Agency (Lab)
- **Results Console**- A quick spot to add common Lab results that do not come in electronically

Screenings

The Screenings Activity Tab is where Providers and Clinical Staff can document several different screenings. This is used primarily with the VBC and CHE programs, however is available for all Patient's.



The different Screenings captured here include:

- **Travel/Exposure-** This screening is used to evaluate a Patient's Travel/Exposure history

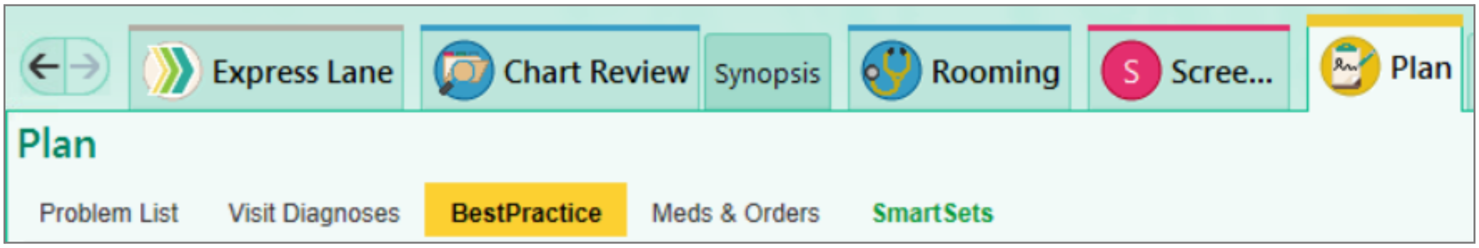
- **PHQ-9- Patient Health Questionaire**- This screening is used to evaluate for Depression and can warrant a referral to Behavioral Health Services
- **Partner Violence**- Screening to evaluate for Partner Violence
- **Mini Cog-** a 3 minute screening instrument to evaluate if an adult has a cognitive impairment
- **C-SSRS- Columbia Suicide Severity Rating Scale-** This screening is a Suicidal Ideation and Behavior rating scale
- **SDOH- Social Determinants of Health**- Screening to evaluate the Patient's needs outside of the Clinic walls
- **PAM- Patient Activation Measure**- Used to determine the Patient's knowledge, skills and confidence to manage their health

FYI- IMPORTANT

At this time, the PAM Screening is completed outside of CKD EHR by Epic and the scores are then added into this Activity Tab manually.

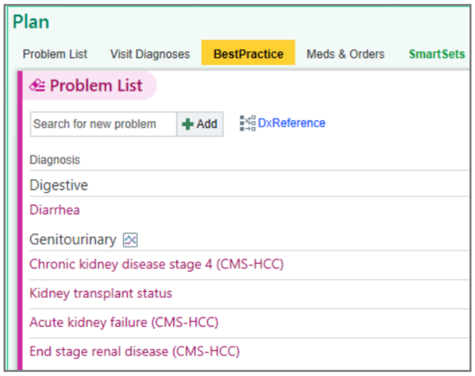
Plan

For Providers that choose to NOT utilize the CKD EHR by Epic Express Lane, they can document their visits through the Plan and Wrap Up Activity Tabs.



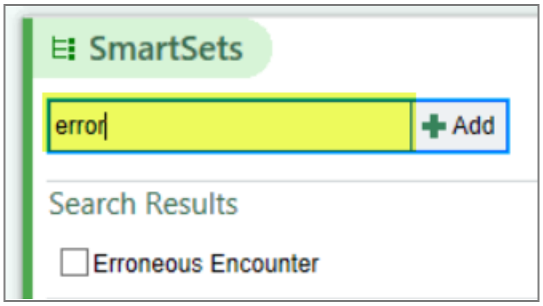
In the Plan Activity Tab, Providers will start their documenting in the Problem List Card.

- **Problem List**- Shows the Patient's current Diagnoses. You can also add more Diagnoses here



- **Visit Diagnoses**- This is where you select the Diagnoses that you are addressing during **THIS VISIT**
- **Best Practice Advisories**- Based on the Problem List, the Best Practice Advisories makes recommendations and allows for quick ordering of Referrals
- **Meds and Orders**- You can review, delete, edit or refill Medications here
  - To add a new Medication or Order, you will utilize the '**Add Order**' Button down below on the bottom left of your screen!

- **Smart Sets**- IN CKD EHR by Epic, you will use this to document an Erroneous Encounter ONLY!
  Use this to document when you have accidentally documented the wrong information in this Patient's chart



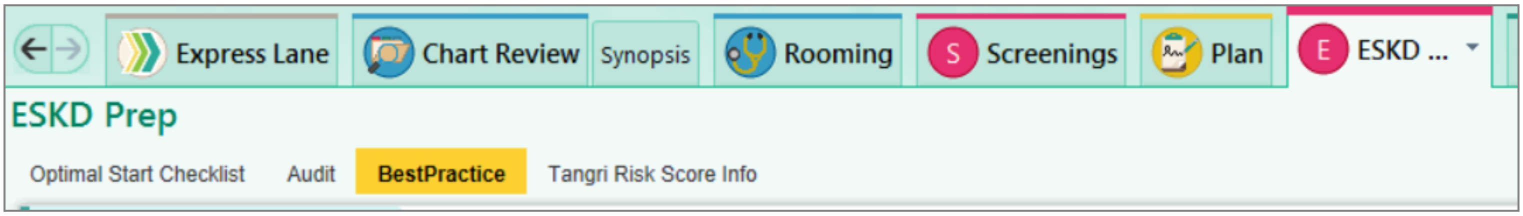
HYPERLINK

See 'Documenting a Visit Using Plan and Wrap Up Activity Tabs' section of this manual for more information!

ESKD Prep

As the landscape of Nephrology is changing to pay for performance models and with advances in technology, CKD EHR by Epic has designed tools to support these changes.

ESKD Prep is an activity that allows providers to track the education, referrals, modality selections, and RRT or transplant status of their kidney disease patients.



As you treat patients on the kidney care continuum, this Activity Tab provides you with data for managing your patient population, and tools to help improve clinical outcomes and enable value-based care.

There are tools within CKD EHR by Epic that have been developed to help users:

- Optimal Start Checklist
- Audit
- Best Practice Advisories
- Tangri Risk Score Info

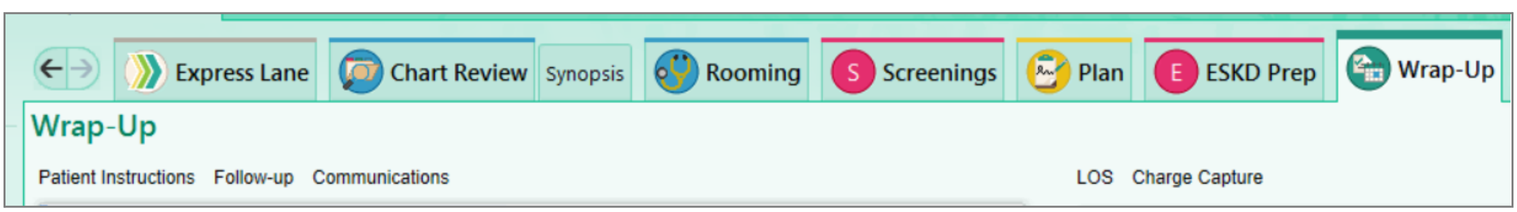
These documentation screens will allow you to track ongoing kidney care at both the patient level and at the practice level!

CKD EHR has created workflows with alerts triggered by your patient's CKD stage and streamlining the referral process by creating a place within the patient's chart to track what interventions have been completed as you prepare your patient as their kidney disease progresses.

Data from here populates into the CKD Insights Dashboard

Wrap-Up

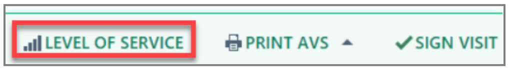
If you decide to document through the Plan/Wrap Up Activity Tabs, this will be your final Tab to address.



The Data elements here are:

- **Patient Instructions-** Document any instructions for the Patient. You have full access to the Note Editor and can utilize any Smart Tools in your instructions.
  - This data will be pulled into the AVS (After Visit Summary).
- **Follow Up-** Document your recommendations for the next visit here.
  - This also is pulled into the AVS.

- **Communications-** You can use this section to send any communications to the Patient, Primary Care Provider, Care Team or Referring Provider.
- **LOS- Level of Service-** To document your visit time and code, the LOS is now located down below to the right hand side of your screen.



- **Charge Capture-** If there are charges that are NOT a part of the LOS (Such as clinic administered medications, etc…) you would document this here.

Internal Document Hyperlink

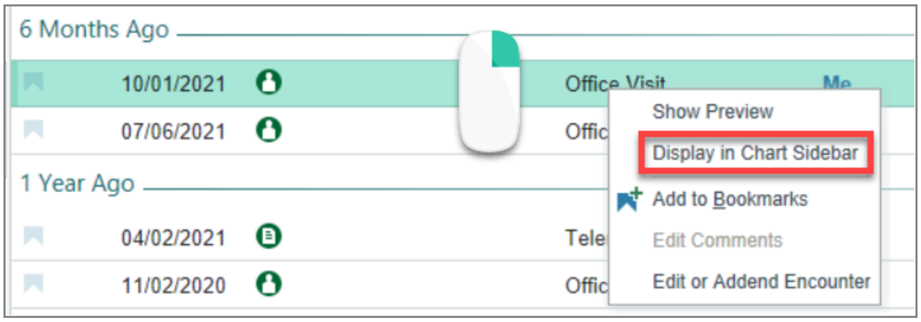
See '[Documenting a Visit Using Plan and Wrap Up Activity Tabs]' section of this manual for more information!

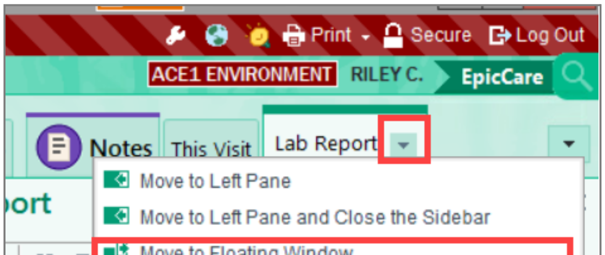
Side Bar Functions

You can keep a Chart Review report visible while you're charting by pinning it to your sidebar.

For example, you could keep a summary of the last visit in the sidebar if you want to refer to it during the current visit. This keeps more information in view and reduces your need to move between different activities and reports.

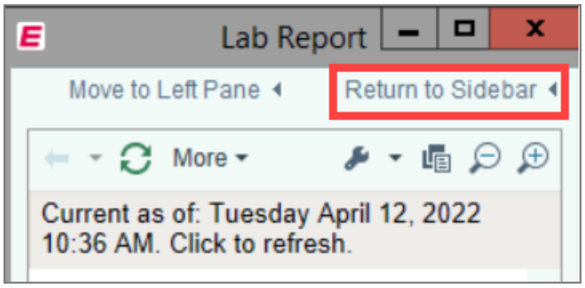
1. In Chart Review, select a report to pin to the sidebar.
2. Right-click that row and select '**Display in Chart Sidebar.'**





3. If your computer has two monitors, consider moving the sidebar to the second monitor. Click the arrow on the Visit Report tab at the top of the sidebar and select '**Move to Floating Window.**'

4. Click '**Return to Sidebar**' to return the sidebar to its original position.

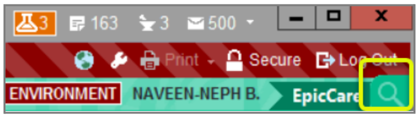


Exercises

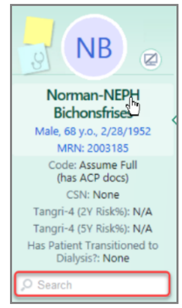
FYI- IMPORTANT
All In-Class exercises will be done within the system while in class! Use the logins and password provided by your trainer at the beginning of class to work through these exercises.

On your schedule, you see that there is a 9 am appointment for Norman. This is a Follow Up visit for Chronic Kidney Disease. The Nurse has just finished rooming Norman and now you would like to get up to speed on Norman's history BEFORE entering the room

- Go to the Schedule and single-select Norman's 9 am appointment so you can see the '**Snapshot Report**'.
  - o Review key info on the report, including where my '**Last Relevant Note'** appears.
- Select the '**Chart**' icon to jump into this patient chart
- If you want to find a reference in the chart quickly, you can use '**Chart Search'** in the upper right hand corner of your screen, or



from within the Storyboard!



- o Do a chart search for **Renal Function Panel**
- o This is useful if you're looking for specific information related to your search term (notes, meds, problems, etc.)
- o Hover over some search results to see more info

- Use the Chart Review Activity to view information about Norman's past visits.
- Practice using the tabs to drill down to what you want to see (labs, notes, etc.)
- Practice using **quick filter check boxes** for visits with you, your specialty, etc.

Stop 

here and wait for instructor

Care Everywhere

Manual Query

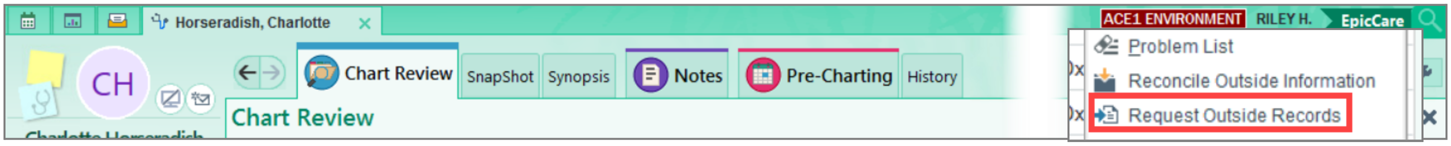
Care Everywhere is CKD EHR by Epic's interoperability tool for Providing access to medical information recorded at other organizations. This function allows you to get a more complete view of a patient's chart before making decisions about a plan of care

- A few situations where Care Everywhere is especially useful include:
    - o New patients
    - o Emergency or urgent care
    - o Specialty visits with patients from other organizations

Queries are typically done automatically by the system at check-in.
The organizations that the system queries are based off of circle around the patient's primary residence and/or employment locations. If a connection is not made to a relevant organization from the query, you can manually query within the encounter!

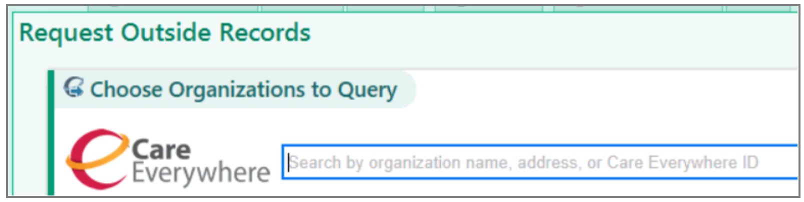
Let's try it out!

- In your Patient's chart, navigate to the far right of the Activity Toolbar and click on the **drop down arrow** next to the wrench:

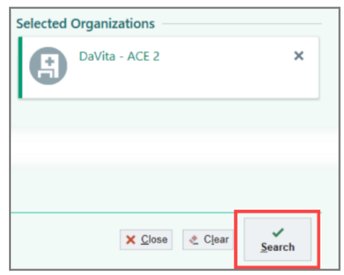


- Scroll down to '**Request Outside Records'** and click to select

- In this new window, search by organization, address or ID if the organization that you are looking for isn't shown automatically



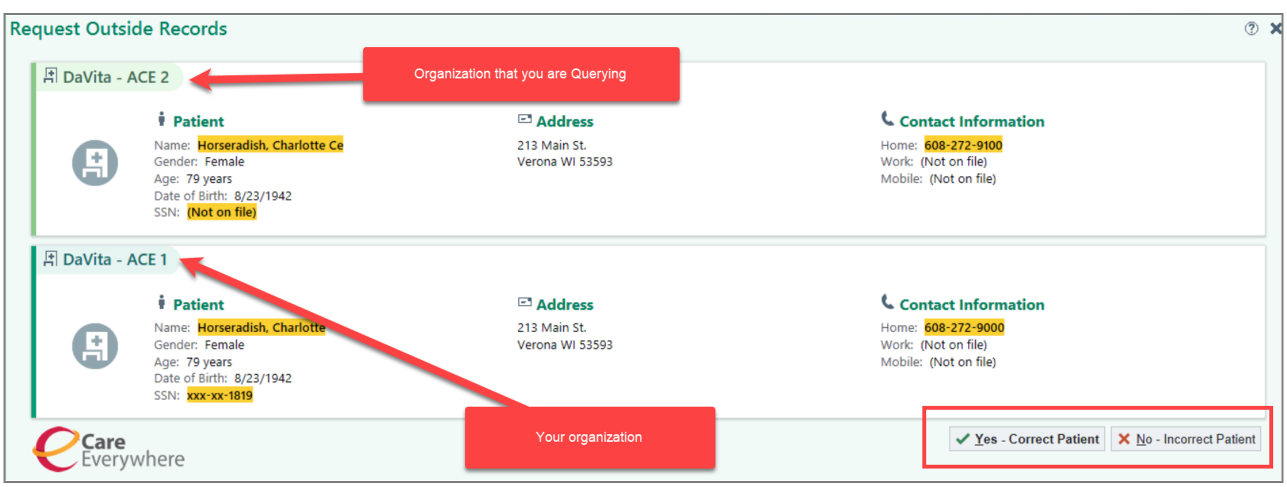
  - Once you have selected the organization to query, it will appear at the far right of your window.
  - At the bottom of the window, select the '**Search**' button to start the query



  - If there are multiple Patients that MAY be a match, this window will ask you to decide if this is the correct Patient based on the information pulled in the query.

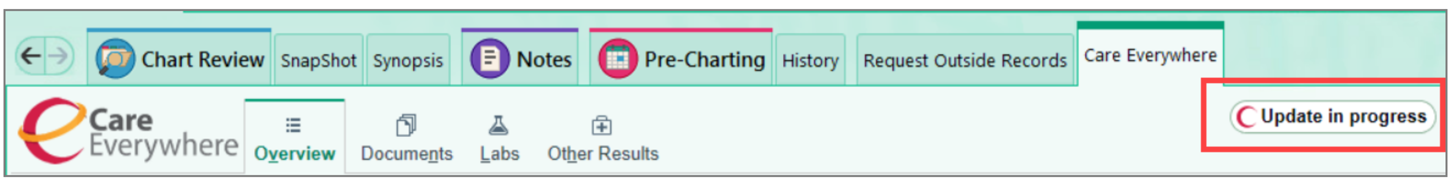
  - All data that does **NOT** Match will be highlighted to make it easier for you to judge the information discrepencies

  - Select the appropriate response down below on the right!

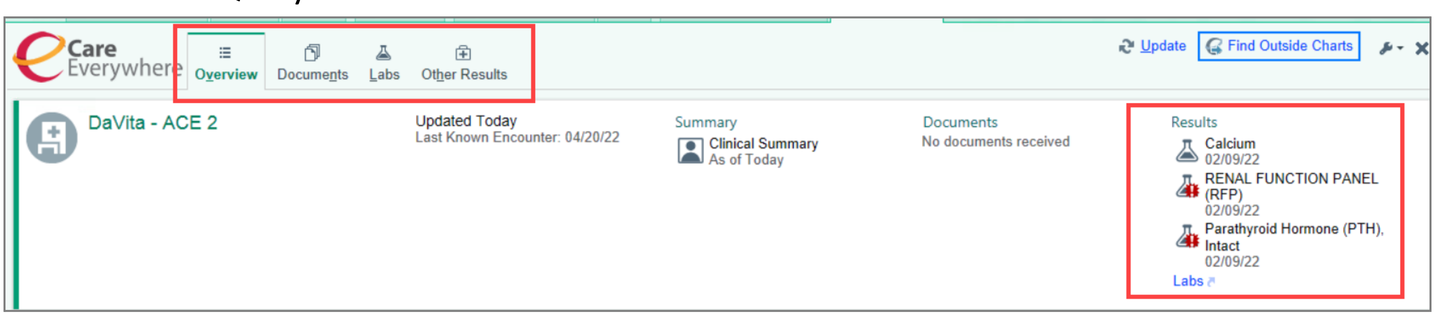


- Once you've accepted the Patient, You will see the '**Next Step**' window. Click on the '**View Outside Chart**' button to continue

- In this next window, you will see that the system is updating. Please be patient here, the information is coming!



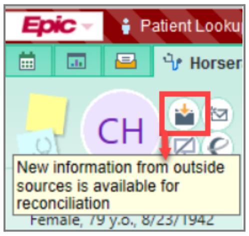
- Once the update has completed, any data that has come over will be viewable in one of the 4 tabs displayed at the top.
    - There will automatically be results for labs shown if any results are present in theQuery



    - Selecting the 'Documents' tab shows any Clinical Summaries, Progress Notes or other documents that came through

Reconciling New Information

Now that you have pulled in any outside information, you will need to reconcile this data into the Patients chart.

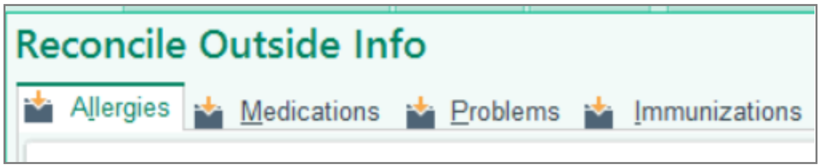


The easiest way to do this is to select the **'New Information from Outside Sources'** pop up located in the Patient Storyboard at the top right hand side, next to the photo

Legend:

- Add
- Delete
- Merge/Combine

When you go into the reconcile activity, you are presented with 4 tabs to work through. Each tab will show different types of information that is available to be reconciled.



Allergies-

Agent	Reaction	Severity	Reaction Type	Comments	Source	Noted	Updated on

Medications-

Medication	Sig	Start Date	End Date	Source	Updated on

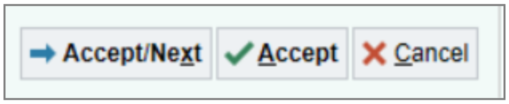
Problems-

Diagnosis	Overview	Source	Noted	Resolved	Updated on

Immunizations-

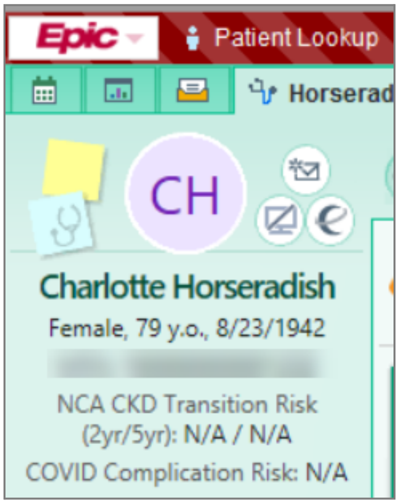
As you work through the tabs, you are deciding which data elements will be added, deleted or combined within that Patient's chart.

After each tab is completed, you may either click to the next tab up top, or you may select one of the 3 options down below to the right.



Once all the tabs have been worked through, select '**Accept**' to go back to the Care Everywhere Activity Tab.

Note: You will notice that the reconcile Icon has disappeared from the Storyboard!



Creating an Encounter

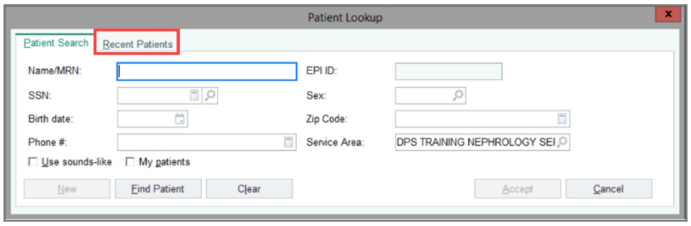
There will undoubtedly come a time that you will need to document in a Patients chart that isn't scheduled for a visit. For this, you will need to create a new encounter, also called an "Encounter on the fly." There are 2 ways to do this and we will cover both of these steps

Patient Search

- Select the '**Patient Lookup'** icon on the Epic Hyperspace Toolbar

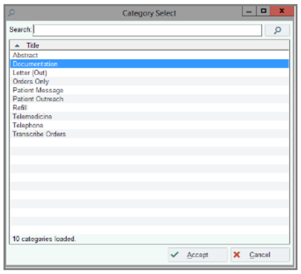
- In the Patient Lookup window, enter the name of the Patient you are searching for. ***Note:*** *You can also select the '**Recent Patients**' tab to search for recently opened charts!*

- Select '**Find Patient'** then '**Select'**

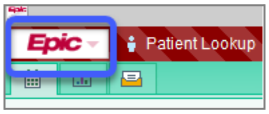


Creating a New Encounter from Within a Patient's Chart

- You are now in the Patient's chart. To open a new encounter, find the '**Create Encounter'** Activity Tab at the top of the chart.
  - Select the type of encounter
  - **'Accept'**
  - Now you can document in the Patient's chart

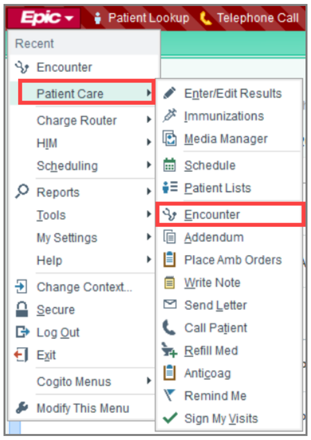


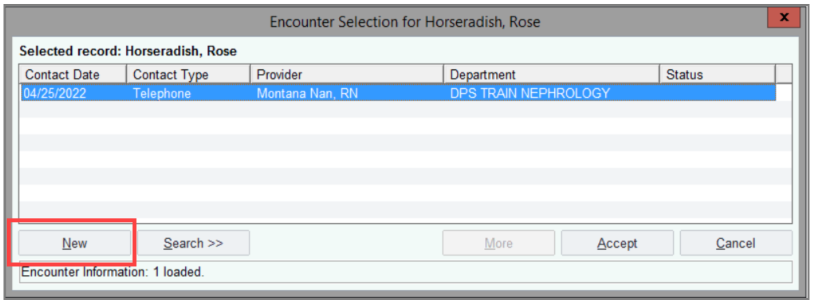
Creating a New Encounter Using the Epic Button (Recommended)



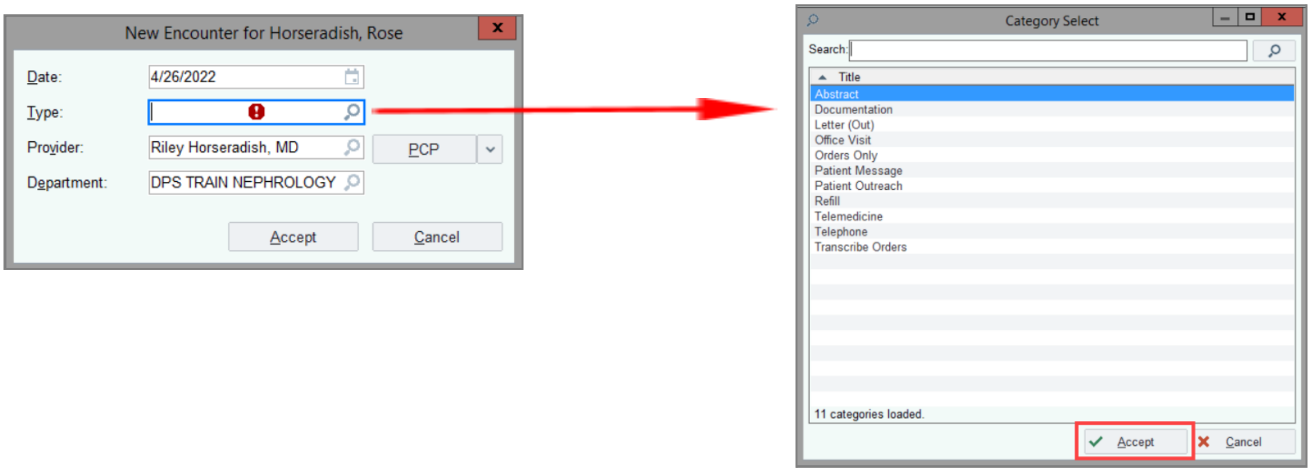
At the top left of your screen, you will see the Epic drop down icon. Select this to start a different way to create a new encounter.

- Path- **Epic drop down arrow> Patient Care> Encounter**
- In the '**Patient Lookup'** window, enter your Patient's name or use the '**Recent Patients**' tab, if applicable
- In the next '**Patient Select'** window, find your Patient and click '**Select**'
- The next window is the '**Encounter Selection**' window. You will select the '**New**' button on the bottom left





Choose the type of encounter you want and select '**Accept**'



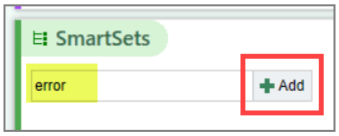
Documenting Erroneous Encounters

Use the Erroneous Encounter SmartSet to close a billable encounter opened in error

Closing an Encounter that was opened in Error by a Provider

If a scheduled encounter was mistakenly started and documentation was started within that encounter, it is best practice to cancel any **Orders** placed and signed, as well as delete any encounter specific documentation entered such as **Reason for Visit**, **Visit Diagnosis**, **LOS** and the **Progress Note**.

4. Within the encounter that is erroneous, navigate to the '**Plan**' Activity Tab
5. In the SmartSets section, type '**Error'** in the Search box and click on the green plus sign to add the set
6. Select the 'Open SmartSets' button

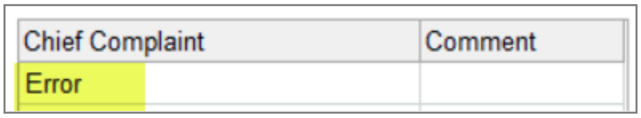


7. This SmartSet allows you to complete the required elements to close a billable encounter by erroring out these fields:
   - Visit Diagnosis
   - Documentation (Progress Note)
   - Reason for Visit
   - LOS (Level of Service)
8. Click on the '**Sign**' button at the bottom right of the section. This will sign the Erroneous Encounter. You will still need to sign the actual visit!

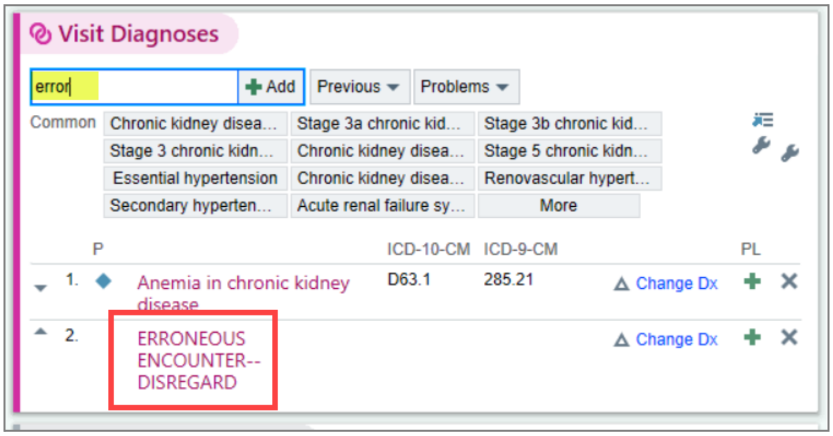
Closing an Encounter that was opened in Error by a Non Provider

All Non-Provider users will have to physically enter 'Error' in each of these sections to close a billable encounter. Only Providers have access to SmartSets at this time.

1. In the '**Rooming**' Activity Tab, type **Error** into the '**Reason for Visit**' box and click '**Accept**'



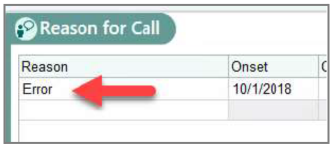
2. **IF** a Progress Note was created- Edit that note and replace the documentation with **This encounter was created in error- please disregard**, or whatever verbiage your practice prefers to be used in these cases
3. In the '**Plan**' Activity Tab, document **Erroneous Encounter- Disregard** in the '**Visit Diagnosis**' add button



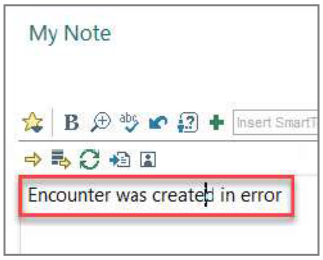
4. Sign the Visit

Closing a Telephone and Refill Encounter that was opened in Error

1. Open the Enocunter that was opened in error



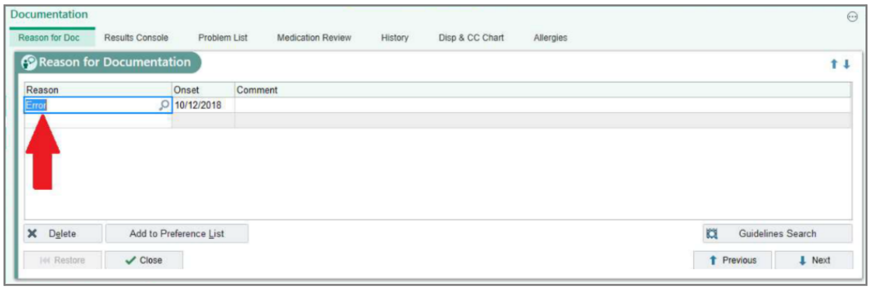
2. In the '**Call Intake'** Activity, open the '**Reason for Call**' section and document **<u>Error</u>** in the reason field



3. In the '**Notes**' Activity, type **<u>Encounter was Created in Error</u>** and click '**Accept**'
4. Sign the Visit

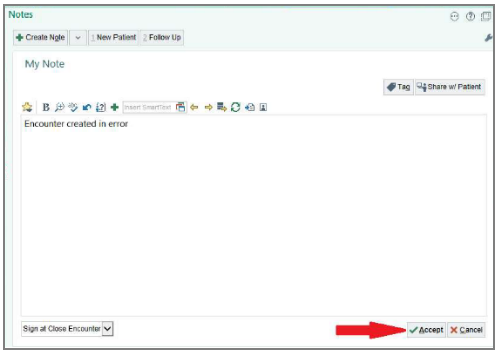
Closing a Documentation Only Encounter that was opened in Error

1. Open the Documentation Encounter that was created in error
2. In the Acitivty, open the '**Reason for Documentation**' section and type in **<u>Error</u>** to the reason field
3. Sign the Visit



Closing a Orders Only Encounter that was opened in Error

1. Open the Encounter that was opened in error
2. In the '**Notes**' Activity, type **<u>Encounter created in Error</u>** and select '**Accept**'
3. Sign the Visit



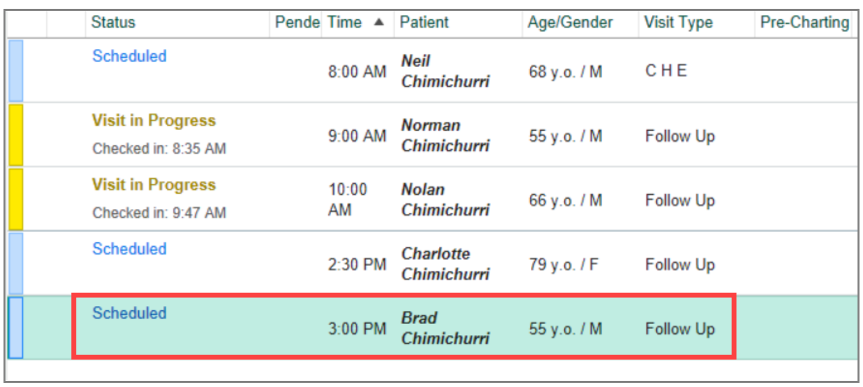
Pre-Charting

Pre-Charting is available before the date of the patient’s scheduled appointment.

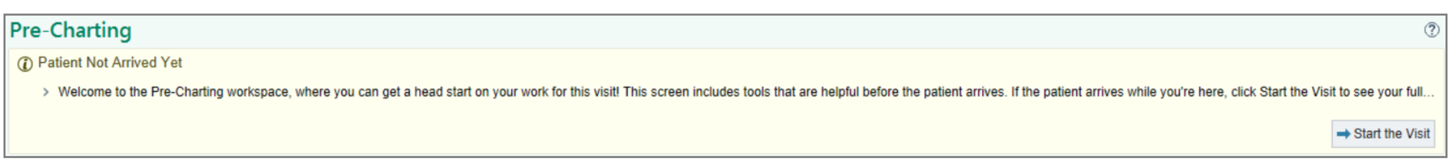
- Within Pre-Charting, you are able to start your note, organize the patient’s problem list, pend orders (i.e.medications or labs), and enter historical results discretely
- Pended orders and notes that have been prepped in the Pre-Charting activity are **deleted automatically after 30 days** if the patient never arrives for their scheduled appointment
    - o Signed Orders, Diagnosis added to the Problem List and Results added to Results Console will **NOT** be automatically deleted if the patient does not arrive for their scheduled appointment

To prepare for a patient's visit by completing some documentation ahead of time, you can open a scheduled appointment from your schedule!

- Open the patient’s scheduled appointment from your schedule



- If the patient has **not** been checked in, the Pre-Charting activity opens.
  Here you can choose the appropriate option (IE…start the visit early with the Patient or do your Pre-Charting)

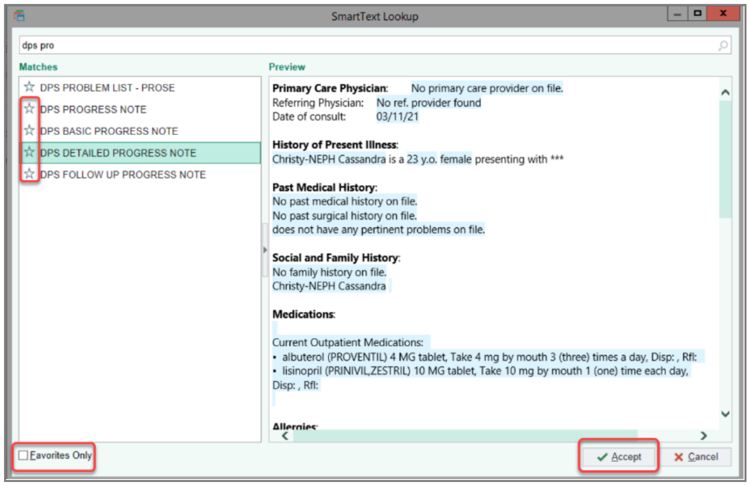


Pre-Charting Notes

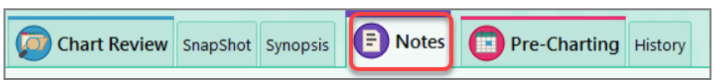
Starting a note before the Patient arrives can save you quite a bit of time. CKD EHR has several templates that you can use for your note, as well as allowing you to create your own!

For this exercise, we will use a SmartText Template. There are 4 that CKD EHR gives you by default:

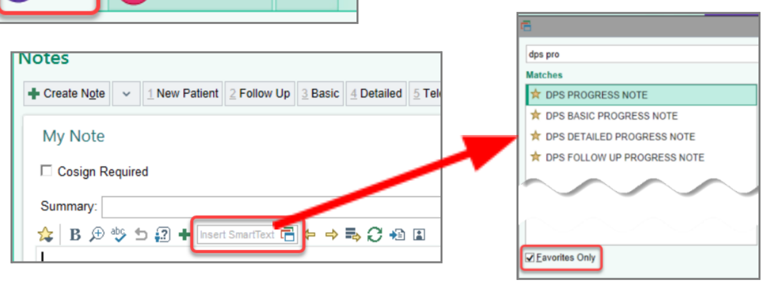
1. DPS Progress Note (**<u>New Patient</u>** Note Template)
2. DPS Follow Up Progress Note (**<u>Follow Up</u>** Note Template)
3. DPS BASIC Progress Note (Robust Note **<u>without</u>** Health History)
4. DPS DETAILED Progress Note (Robust Note **<u>with</u>** Health History)



You can access your notes by using the Notes Activity Tab at the top of your Patients chart.



Once you are in the notes window, you will go to the SmartText box and, for example, enter **<u>DPS Detailed Progress Note</u>**.



BACKPOCKET

CKD EHR will give you a preview of what each template will bring into the note. Once you single click to highlight the desired template, the preview will populate on the right hand side of the window.

Another function to be aware of is the '**Favorites**' functionality.

By selecting the **STAR** next to a template, you are marking it as a commonly used template

The nice thing about this is that you will not have to search by name in the future; you will be able to select the '**Favorites Only**' box at the bottom left, and CKD EHR will only show those templates that you have marked as favorites

Now that you have your template open, using your F2 functionality, work your way through the note and make the appropriate selections and entries

Shortcut Key	Action
F2- Use F2 to follow through	Will move your cursor to the next editable/required field
F3- Use F3 to "See"	With your cursor within the note body, F3 will expand your note window to full screen
L mouse, R mouse- Left to pick, Right to stick	**L** mouse button will allow you to "pick" the selection you want. **R** mouse button will "Stick" it into the note.

Don't forget some easy key shortcuts to help you navigate and complete these notes faster!

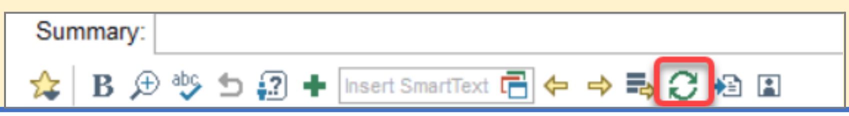
Once you have finished, select the '**Accept**' at the bottom of your note

Close out your Patient's chart to be taken back to the Schedule view

BACKPOCKET

Keep in mind that **AFTER** you have seen the Patient, you will need to **REFRESH** this note before finishing it up.

This is to bring in any new information that you added during the visit!



Pre-Charting History

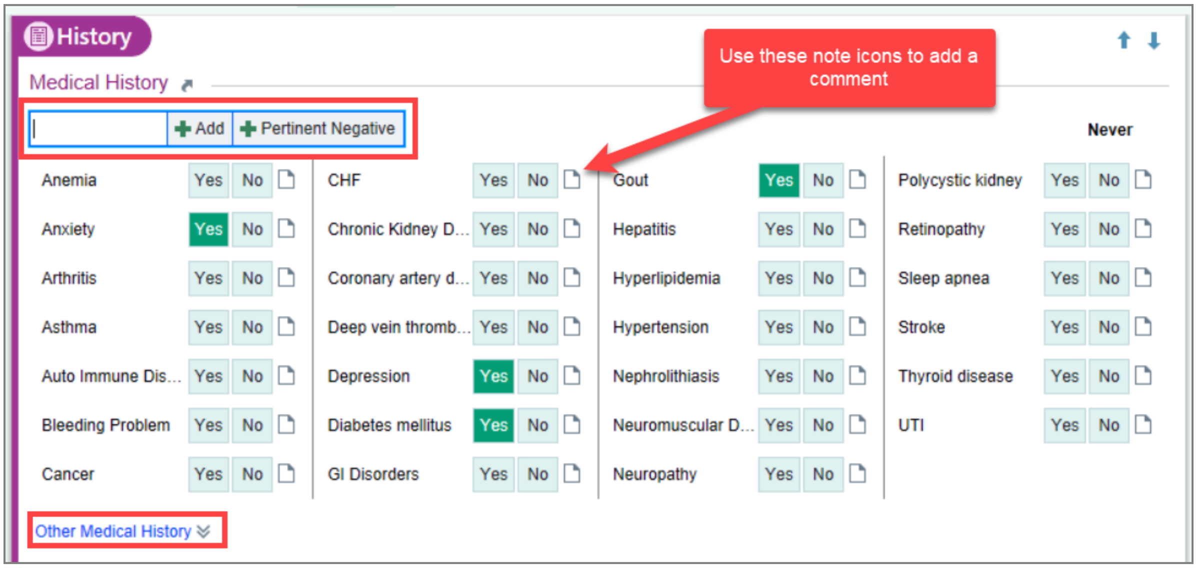
Underneath the Pre-Charting alert, you will see multiple task tabs. These are here for fast navigation.

To document a Patient's history, select the 'History' button at the top

Now you are in the History documentation part of Pre-Charting

Here you can documents History of the Patient as well as Family, Surgical, and Socioeconomic History (Smoking, Alcohol and Substance use)

Medical History



To document in this screen, simply select the '**Yes**' buttons to show a positive diagnosis

You can also add a Diagnosis at the top left, as well as mark a Pertinent Negative!

FYI

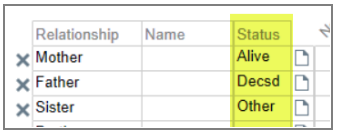
You can use the note icons to document a comment about the Diagnosis. Any text added in the comment box will show up in your note!

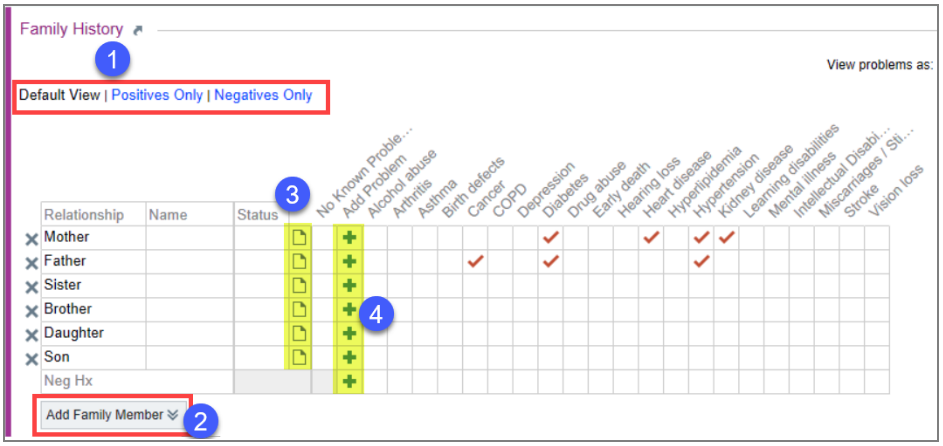
Family History

To document Family History, we use the Family History Activity!

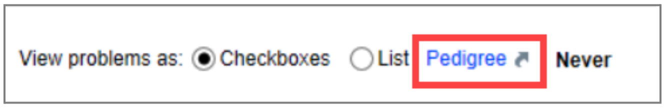
Some of the elements to call out:

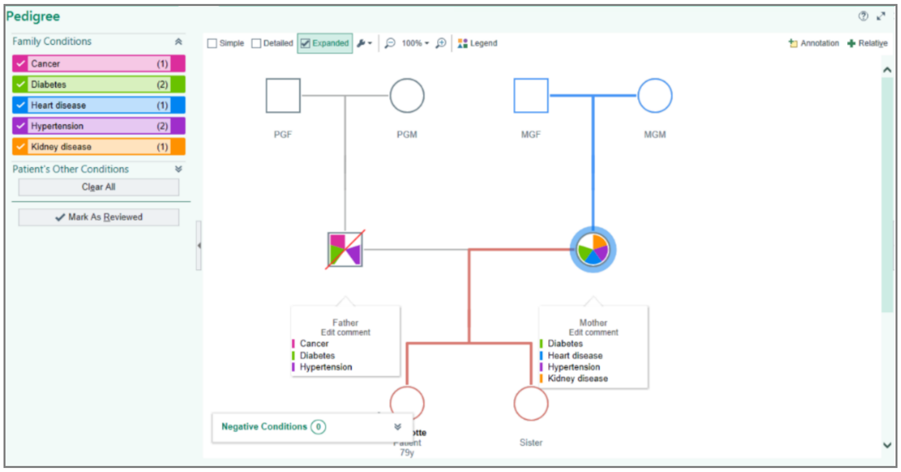
1. The Default view is to show ALL data. However, if you prefer, you can select '**Positives Only**' to view just the positive history for the family members
2. You can also add family members that are not called out up above by clicking the drop down arrows here
3. To add a comment, use the Note Icon. You can also select a Status here
4. To add a Diagnosis to a family member, select the green plus sign in that family members row





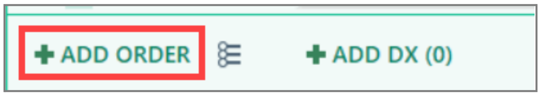
You also have the functionality to view a Pedigree format. There is a blue hyperlink located at the top right side of this Activity!



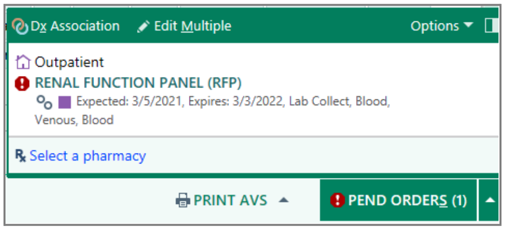


Pre-Charting Orders

To add some orders in the Pre Charting activity, this is easily done by using the '**Add Order'** function in the '**Visit Task Bar**' (Bottom left)



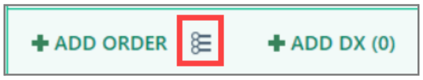
Nurses and MA's can place orders in Pre- Charting, however they cannot sign off on those orders. They will place the Orders, mark them as Pended and then the Provider will sign those orders when they see the Patient



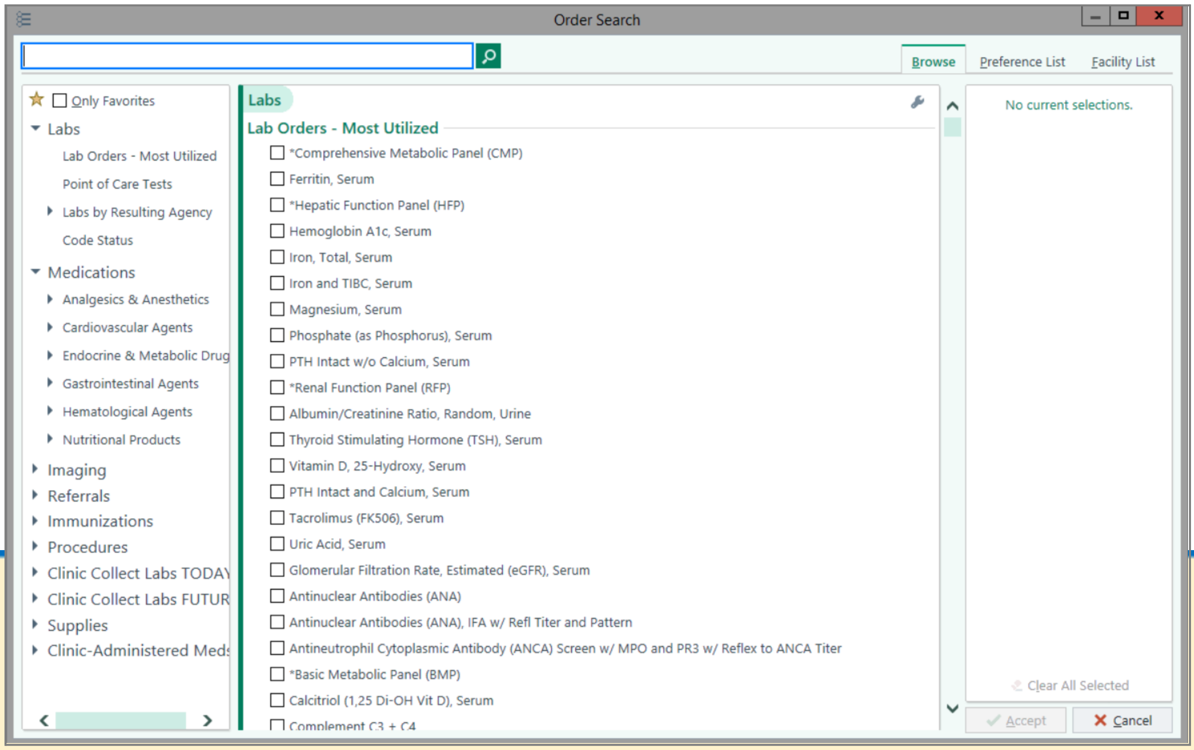
For instance, if an MA orders a Renal Function Panel, they will then **'Pend Orders**'

Using the Add Order function down below on the left, Providers or Clinical Staff can type in orders they want to place

Next to the Add Order button, there is an Icon that represents the Preference List.



Providers can customize different Orders to make ordering quicker and easier in the future

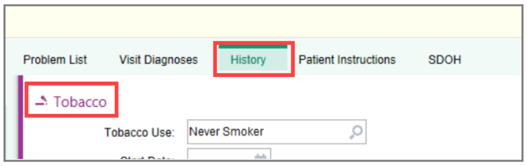


Exercises

For this next exercise, you will be using your Charlotte patient

- Charlotte has active Diagnosis of Type 2 Diabetes, CKD stage 4 and Renal Disorder, However she told the Front Desk that she has a history of UTI's and received positive labs a couple of days ago at her old clinic. She currently has a UTI and would like antibotics for this problem.
- Charlotte's New Patient Forms state that her '**Family History'** includes Graves Disease (father, alive), Cancer (sister, skin, alive) and Substance Abuse (brother, deceased-OD)
- Charlotte's New Patient Forms state that Charlotte has been a smoker for 10 years and smoked about 1.5 packs daily. Her primary use was cigarettes, however she has recently (1 month) been exclusively vaping flavored nicotine in an effort to quit Tobacco altogether

1. Add UTI to her **'Problem List'**
2. Add UTI to her '**History'**
3. Add '**Family History'**
4. Add '**Tobacco'**



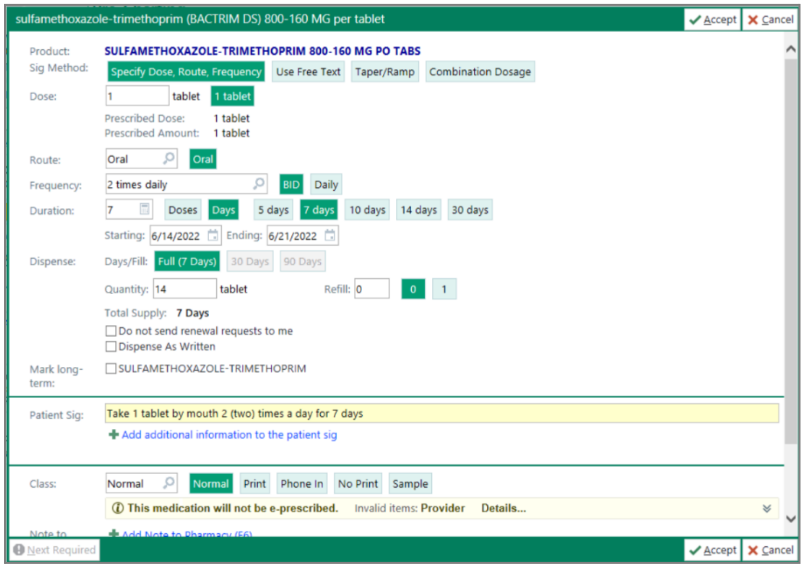
Since you know that you will be ordering some labs and a medication, you can get those ready in Pre-Charting!

You will find the '**Add Order'** box at the bottom left side of your screen. Select this box, then start typing the name of the Lab you would like to order. CKD EHR will completion match for you with just the first 3 letters!

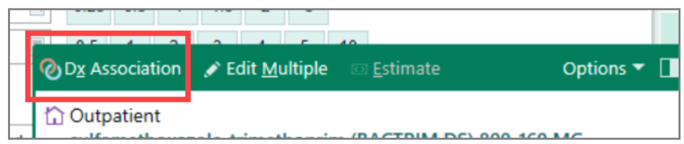
1. Order- **Trimethoprim**
2. Order- **T4 Total Serum-** Normal order, routine priority, Ext Lab
3. Order- **Renal Function Panel-** Standing Order, Monthly for 1 year, routine priority, Ext Lab

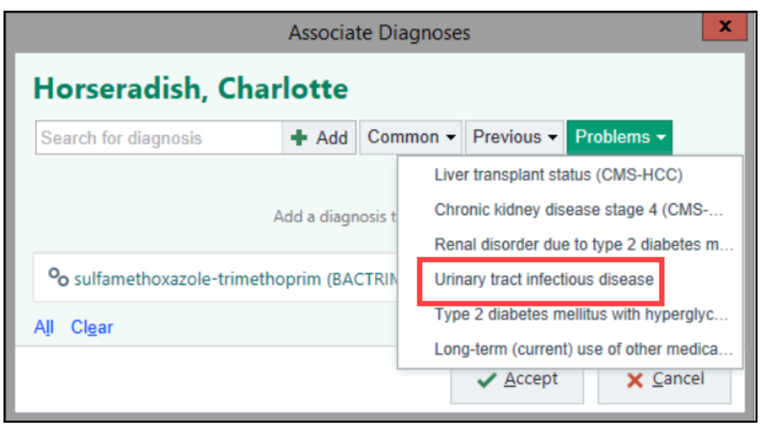
After you select the appropriate labs and Meds, you will see them in your '**Shopping Cart**' down below on the right.

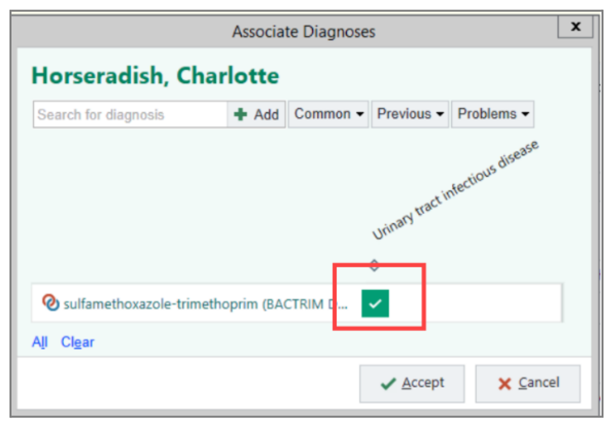
Select the medication and a new window will appear. This is the ‘**Order Composer’**. This is where you will enter all the specifics of the medications



Associate the Diagnosis to this medication within the ‘**Shopping Cart’** by clicking on the Dx Association button at the top left side.

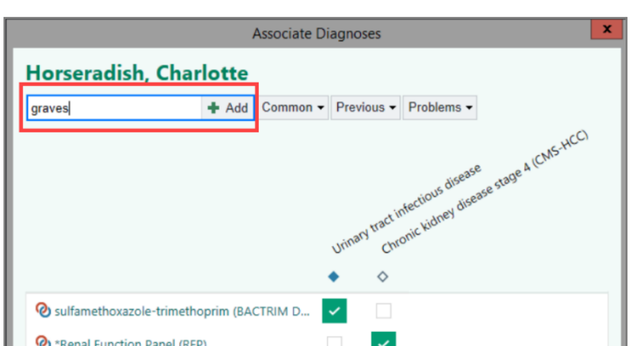


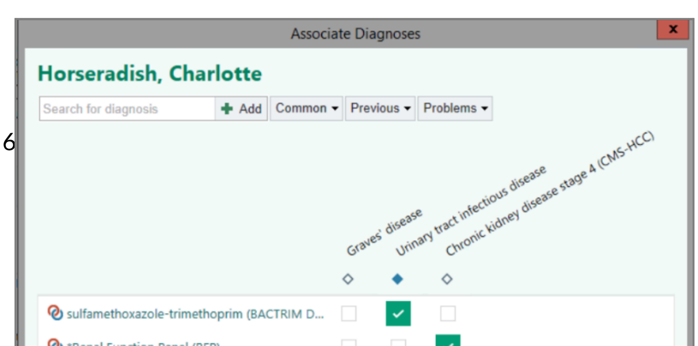




Because you added UTI to the Patients Problem List, that Dx shows up as an option!

For the T4 order, you will need to add a Dx to associate with this order. Use your ‘**Add**’ button at the top of the Associate Diagnosis window and type **GRAVES** to search for that Dx





Once you have added all Diagnosis, simply check the appropriate Dx for each Order/Medication

BACKPOCKET

When you see a little blue diamond under a Dx, that is denoting what the PRIMARY Dx is! To change which one is PRIMARY, just click one of the other uncolored diamonds to mark that Dx as PRIMARY!

These will be in a "Pend" Status until you start the actual visit with the Patient.

Select "Pend Orders" and your orders are now ready to be signed when the visit has started.

Starting a note before the Patient arrives can save you quite a bit of time. CKD EHR has several templates that you can use for your note, as well as allowing you to create your own!

For this exercise, we will use a SmartText Template. There are 4 that CKD EHR gives you by default:

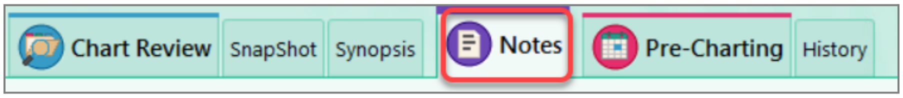
1. DPS Progress Note (**<u>New Patient</u>** Note Template)

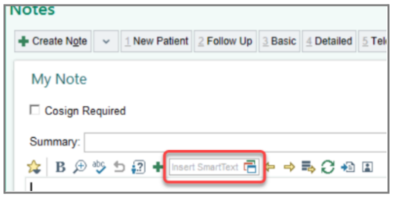
2. DPS Follow Up Progress Note (**Follow Up** Note Template)

3. DPS BASIC Progress Note (Robust Note **without** Health History)

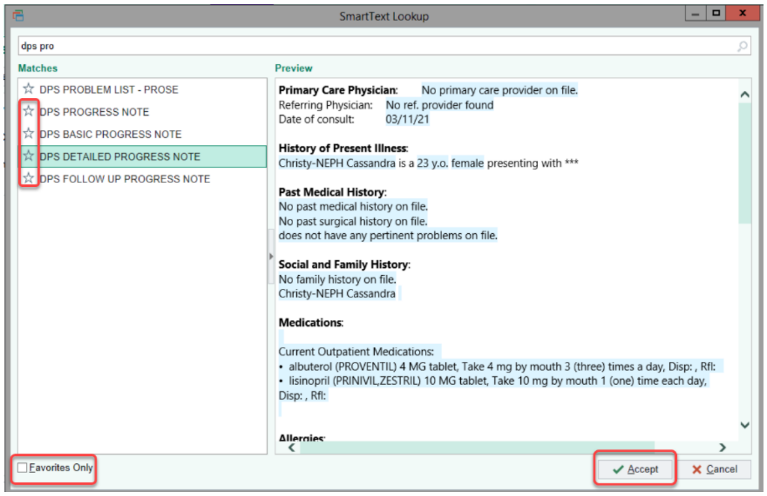
4. DPS DETAILED Progress Note (Robust Note **with** Health History)

You can access your notes by using the '**Notes**' Activity Tab at the top of your Patients chart.



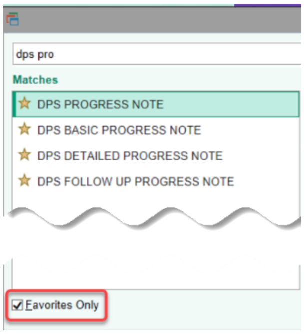


Once you are in the notes window, you will go to the SmartText box and, for today, enter **DPS Detailed Progress Note**. Remember, you can just start to type and allow CKD EHR to completion match for you



As you can see from this picture, CKD EHR will give you a preview of what each template will bring into the note.

Once you single click to highlight the desired template, the preview will populate on the right hand side of the window



Another function to be aware of is the "Favorites" functionality. By selecting the STAR next to a template, you are marking it as a commonly used template.

The nice thing about this is that you will not have to search by name in the future; you will be able to select the "Favorites Only" box at the bottom left, and CKD EHR will only show those templates that you marked as favorites.

Now that you have your template open, using your F2 functionality, work your way through the note and make the appropriate selections and entries.

Don't forget some easy key shortcuts to help you navigate and complete these notes faster!

Shortcut Key	Action
F2- Use F2 to follow through	Will move your cursor to the next editable/required field
F3- Use F3 to "See"	With your cursor within the note body, F3 will expand your note window to full screen
L mouse, R mouse- Left to pick, Right to stick	**L** mouse button will allow you to "pick" the selection you want. **R** mouse button will "Stick" it into the note.

Once you have finished, select the '**Accept**' at the bottom of your note

Close out your Patient's chart to be taken back to the Schedule view

Keep in mind that **AFTER** you have seen the Patient, you will need to REFRESH this note before finishing it up. This is to bring in any new information that you added during the visit!

Stop here and wait for instructor

In Basket Basics

In Basket is a task management tool that collects information like lab results, patient questions, and prescription refill requests – into an organized, actionable work list.

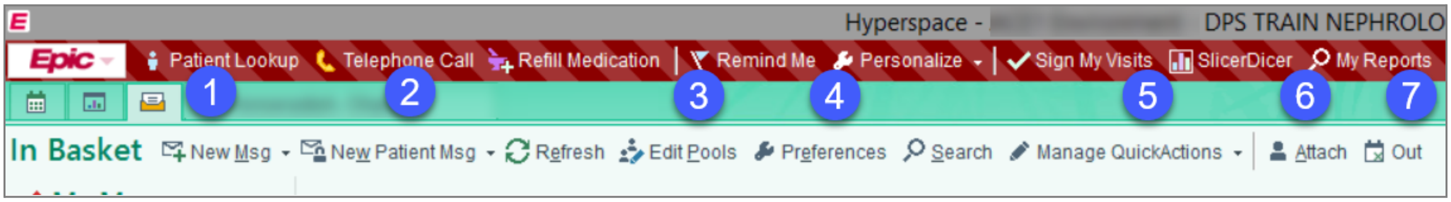
While In Basket message sometimes look like email, most of them are actually tasks you need to accomplish rather than messages to read and discard.

Each message type requires a different follow-up action. So, for example, you would have different options for dealing with results than you would with medication renewal requests.

MyChart is used heavily within In Basket. This is the primary way for Providers to communicate with patients and vice versa.

- Non-PM Interfaced Practices can fully utilize the MyChart functionality!
    - Users can Schedule Appointments, Cancel Appointments, contact their Health Care Providers and view Labs, tests and Medication information within their MyChart Portal
- PM Interfaced Practices Have Limited use functionality of MyChart
    - Users can view Labs, Medications and contact their Health Care Providers, however **all scheduling functions** (Making appointments, cancelling appointments or changing appointments) are not available

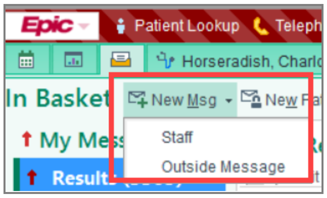
Navigation- Toolbars and Message Body



Available actions on this toolbar are **not** specific to particular message types. This is the main In Basket tool bar and is available to use no matter where you are within the In Basket Activity

These toolbar buttons are here by default and are used for tasks such as:

- Creating and sending New messages
- Editing Pools that you belong to
- Changing your In Basket settings
- Searching messages
- Managing Quick Actions
- Attaching your In Basket to someone else
- Creating an Out of Office instance



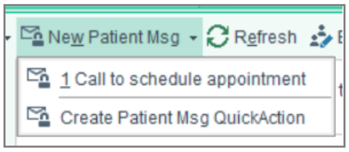
1. The **New Msg** button is where you go to send staff and outside messages
   - **<u>Staff messages</u>:** used by staff at your practice. They are used to communicate non-patient related information and basic administrative topics. Even though you can communicate about a patient in a staff message, it will not be saved as a part of the patient's record
   - **<u>Outside messages</u>:** used by users to send direct (secure) messages containing a patient's CCD to outside organizations. This is a secure messaging platform via Surescripts. (Inside an encounter you can also send via the Wrap Up>Communication activity)

BACKPOCKET

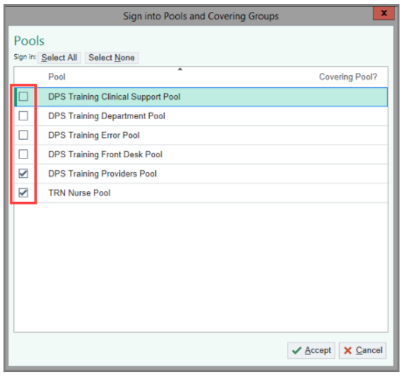
Clinicians can use the '**Current Patient** 'button to finish up In Basket messages faster.

If you prefer keyboard shortcuts, pressing **ALT+Shift+P** gets the same result

2. **New Patient Message**- Here you would have the ability to send a patient a message via My Chart
   - Once you have created a QuickAction for new patient messages, it will populate here for easy selection



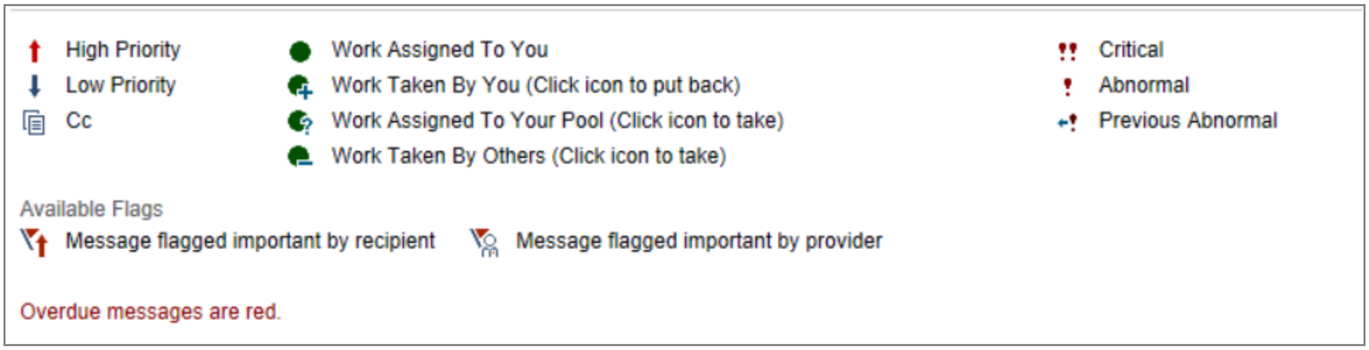
3. **Edit Pools**- A pool is a group of users who all receive a single message which requires follow up action from one person in the group (pool)



- For example, you might send a message to your department's clinical support pool if you need someone to call a patient 24 hours after they received an injection
- Practice Managers are responsible for managing pools
- All In Basket users can edit pools they belong to by checking themselves in and out
- If someone (like a provider) sends a message to a pool, everyone in that pool receives a copy of the message
- One person in the pool must take responsibility for a message/task so that other pool members know that they are working on it
- Once that person completes that message, the message/task is removed from the In Baskets of everyone else in the pool

Legend:

- Icons indicate who is responsible for the message
- **Question mark means no one has taken responsibility**
- The green balls indicate responsibility

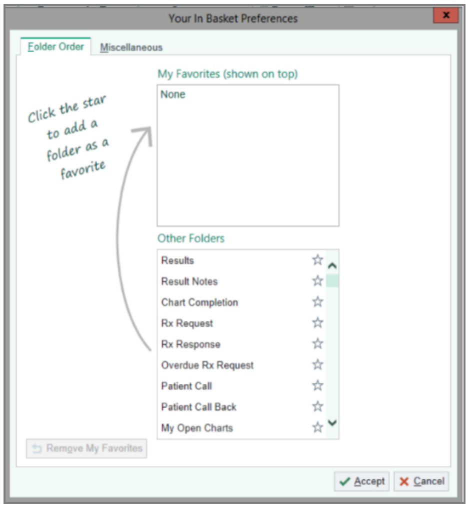


There are 5 in-system pools that have been created for every practice in CKD EHR by Epic. They are set up to receive the following message types by default:

- **<u>Provider Pool</u>**- receives Rx Requests, Rx eRefills, Lab Results, and Clinical Updates
- **<u>Clinical Support Pool</u>-** receives Patient Rx Requests, MyChart Patient Advice Requests, and Overdue results
- **<u>Front Desk Pool</u>-** receives Appt Requests and MyChart patient messages (non-clinical)
- **<u>Department Pool</u>-** receives general departmental messages and generic staff messages
    - o Everyone at a practice would still need to be checked into this pool for anyone to receive the message!
- **<u>Error Pool</u>**- receives error messages that need to be reviewed (i.e. ePrescribe and Refill request error messages)
    - o Clinical support staff generally watch this pool

Type of Pools	Provider Pool	Clinical Support Pool	Front Desk Pool	Department Pool	Error Pool
Pool Naming Convention	Last Name, First Name – Provider Pool (Acct #)	Location/Dept. – Clinical Support (Acct #)	Location/Dept. – Front Desk (Acct #)	Location/Dept. – Department (Acct #)	Location/Dept. – Error (Acct #)
Types of Messages Sent to this pool	1. Rx Requests 2. Rx eRefill 3. Lab Results 4. Clinical Updates	1. Pt Rx Requests 2. MyChart Patient Advice Requests *(clinical info request)* 3. Overdue Results	1. Appt. Requests 2. MyChart Patient Messages *(non-clinical messages)*	1. General department *messages (everyone would still need to be checked in)* 2. Generic Staff Messages	1. Errors that need to be reviewed *(ePrescribe & Refill Requests)* *Clinical Support Staff generally watch this pool.

4. **Preferences-** Use this to re-organize the look of your folders to the far left. You can put them in the order that works best for you! Once you select a folder, you can click on the star to favorite it or reorder the folders that display to the left side



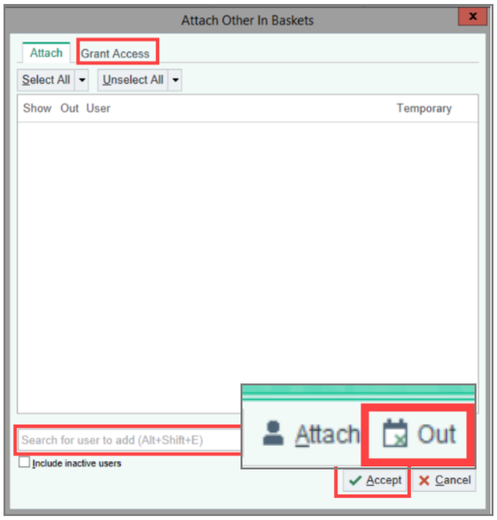
5. **Manage Quick Actions-** If you receive In Basket messages that require routine follow-up, you can quickly complete that follow-up using a QuickAction
    - QuickActions are available for routine letters, result notes, QuickNotes, MyChart messages, and more.

HYPERLINK

	Click here to learn more about Quick Actions in the Personalization User Guide!

- For example, in your Results folder, you might have a QuickAction called ‘**Abnormal**’ that creates a result note using your standard text, routes it to your preferred recipients, and marks the message as Done in a single click

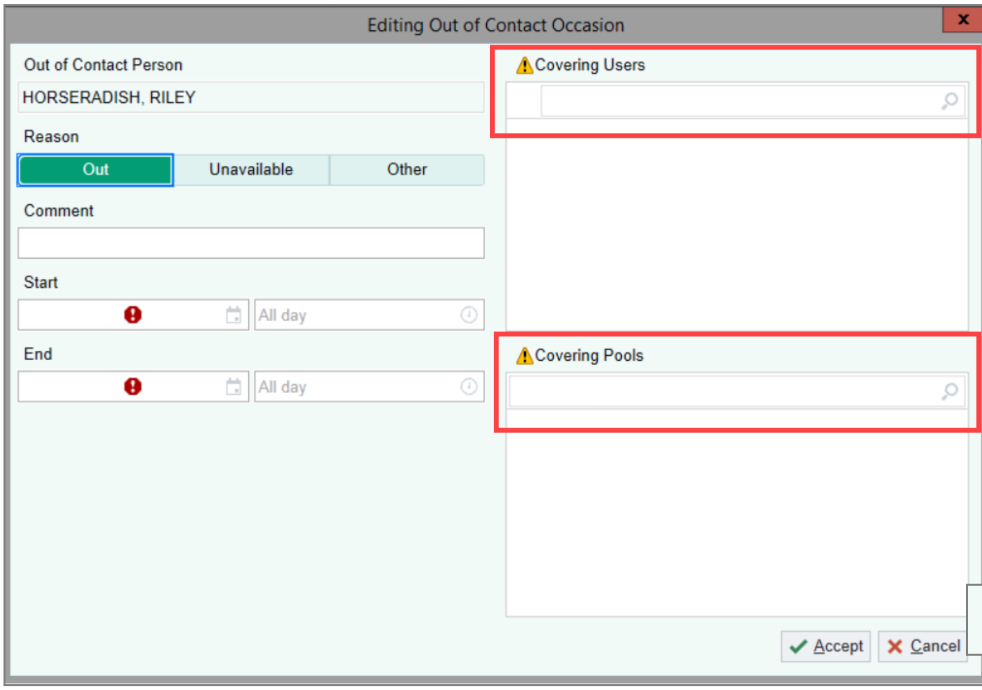
6. **Attach-** If you're going to be out of the office, or if you want support staff to help you handle your In Basket messages, you can grant people access to your In Basket via Attach!
   - For example, It is particularly helpful for physicians who would like their support staff to help them manage their In Baskets
   - In order for someone to be able to attach to your In Basket, you must first grant them access (permission)
   - To do this, click ‘**Attach**’ and open the ‘**Grant Access**’ tab and add the user’s name in search field
   - Click Accept



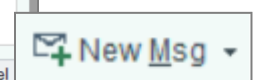
7. **Out-** If you are going to be out of the office for an extended period of time, you will want to mark yourself as Out of Contact (OOC) via the Out button.
   - To do this, select the ‘**Out**’ button in the Toolbar at the top
   - Next go to the bottom of your screen and click "New" to create a new Out of Contact (OOC) occasion

   - Complete all the required fields
   - Here you can designate a ‘**Covering User**’and/or a ‘Covering Pool’. This is a person or Pool of people who will be monitoring your In Basket while you are away
   - When someone sends you a message while you’re OOC, they will receive a warning that notifies them that you are OOC, and likewise who your delegate is

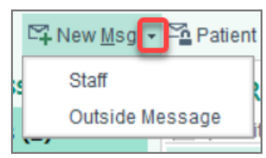
- In addition, the delegate is automatically attached to your In Basket so that they can manage these messages while you're out



Exercises



The new Message button is used when you need to send a message to the staff, or to an outside person/Clinic.



By clicking the drop down arrow, you will be given an opportunity to select which kind of message you want to create.

You have just seen Rose (**Training Last Name**) for a follow up appointment. Now you want to send a message to your Nursing staff asking one of them to call the Patient at the end of the day and confirm that she did get the labs done that you had ordered

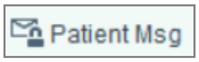
Staff messages: used by staff at your practice. They are used to communicate non-patient related information and basic administrative topics or directions

Follow these steps to send a message to your Staff:

1. Navigate to your In Basket, if not already there

2. Select the '**New Msg'** button at the top, in the toolbar
3. Click the arrow after '**New Msg'** and select '**Staff'**
4. **To**- P TRN NURSE POOL (You can type P NUR as a shortcut)
5. **Subject**- Check in with Patient
6. **Patient**- If you have a Patients chart open, you can just click the "Current Patient" button and that Patient's information will be attached to this message.
    - **For today, we will add "(Last Name), Rose"**
7. Select the box if you want a callback about this message (Usually for external messages)
8. Select a Flag, if needed
9. Select a date and time if you want to send this message out at a later date (IE, when you are on PTO and want a staff member to complete a particular task on a specific day/time)
10. Enter your text in the text box:
    - **"Please contact Rose after 4 pm and confirm that she was able to get those labs completed today"**
11. Select '**SEND'**

Patient Msg- gives you the ability to send a patient a message via **My Chart.**



1. **Select 'Patient Message'**
2. Use the same Previous Patient-**Training Last Name, Rose**
3. Enter the subject (Required Field)

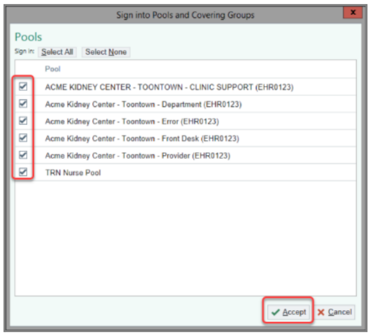
4. Insert your text into the message window

5. Complete the Dates, Options and Tasks/Attachments if needed

Pools

A pool is a group of users who all receive a single message which requires follow up action from one person in the group (pool). Some common pools are for Nurses or Front Desk tasks. Practice Managers are responsible for managing all Pools and will be the ones that assign you into a particular Pool.

To see which Pools you are in, select the Edit Pools icon at the top of your window.
To remove yourself from a Pool, simply select the check box and the check mark will disappear, indicating that you are no longer in that Pool. If you select the wrong one by accident, just go ahead and click in the check box again and there will now be a checkmark, indicating that you are attached to the Pool again.



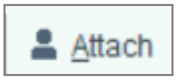
However, you may check yourself in, or out, of any Pool that you are assigned to.

Go ahead and check yourself out of a few pools, then check yourself back in.

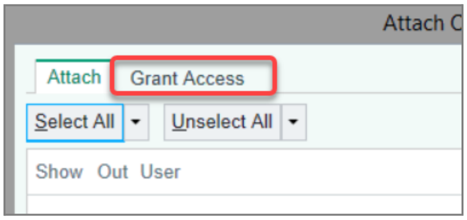
Attaching someone to your In Basket for Support or Out of Office

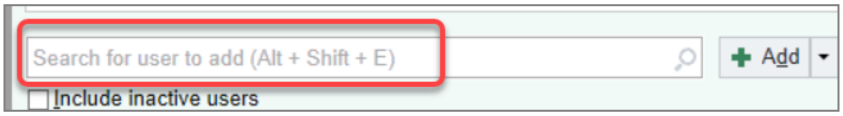
If you want support staff to help you handle your In Basket messages, or you need someone to cover your IB while you are away, you can grant people access to your In Basket via '**Attach**'.

- Select the '**Attach**' Icon at the top of your window.



- Open the **Grant Access** tab and add the user's (the recipient) name in search field.
- Use "Quinn, Mickey" for today, then select "Accept"

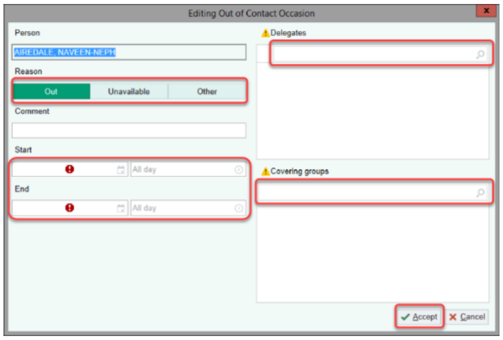




FYI- IMPORTANT

After a User/Recipient has been attached to your In Basket, they will need to click '**Attach**' in their own In Basket to see your messages!

- If you are going to be out of the office for an extended period of time, you will want to mark yourself as '**Out of Contact'** (OOC) via the '**Ou**t' button
  - To do this, select the '**Out**' button and click '**New**' to create a new Out of Contact (OOC) occasion



    - Here you can designate a '**Delegate**', the reason you are OOC, the Start and End dates and the groups you also want them to cover, if needed
    - When someone sends you a message while you're OOC, they will receive a warning that notifies them that you are OOC, **and likewise who your delegate is**.
    - In addition, the delegate is automatically attached to your InBasket so that they can manage these messages while you're out

- Let's assign Quinn, Mickey to be our Delegate
- We are out on PTO from next week through the end of the month. (Use dates that make sense for the time you are training)
- We will not need anyone to cover the groups as they are handled by many people
- Click '**Accept'**

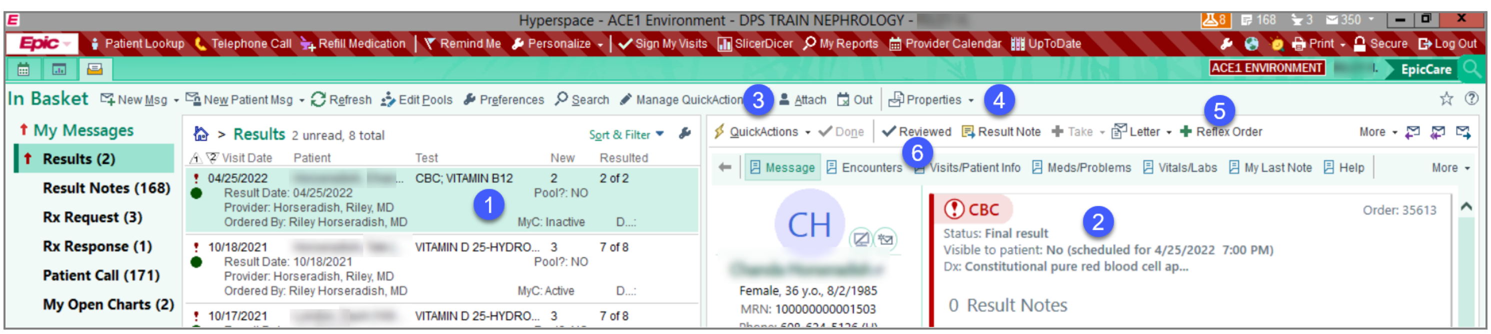
Stop here and wait for the Instructor to continue on

In Basket Common Tasks

Results Messages

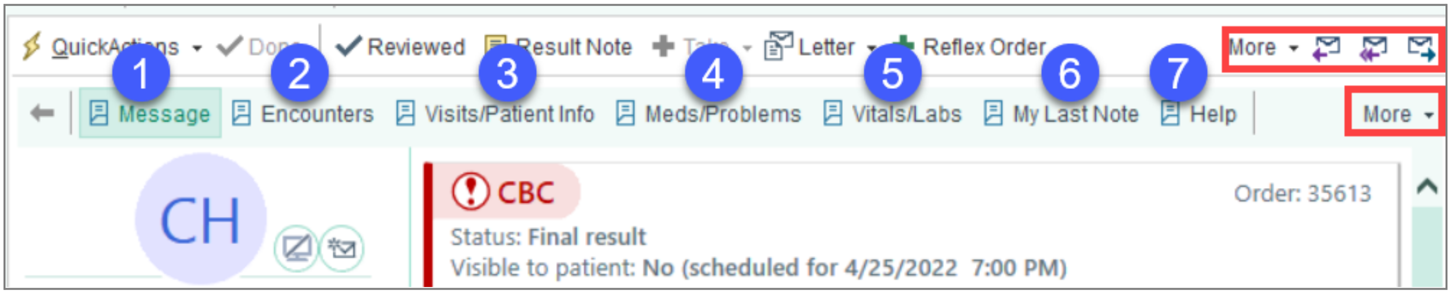
Your results folder contains your Patients lab results that are available for review.

Single lick on the Patient message and you will see that the right hand side bar will open, showing the results. You can work on this result right in this window and will not have oto leave to go to the Patients chart!

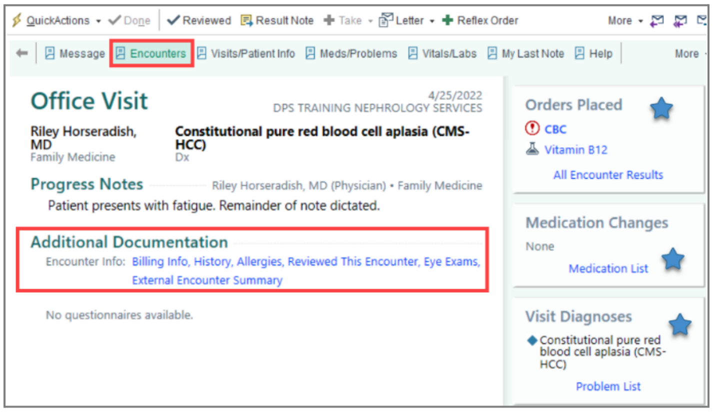


1. Select the message you want to address
2. View the results in the Side Bar
3. Respond with a '**Quick Action**' if you would like, OR
4. Write a **'Result Note'** AND/OR
5. Order a **'Reflex Order'**
6. Mark as **'Reviewed'** to complete this message

You can also do a bit of research here about this Patient. Above the results view, you will see 7 other options to explore.



1. **Message-** the message you are currently viewing
2. **Encounters-** The encounter that is tied to this order. You will see any other orders that were placed, med changes, Visit Dx and any other Additional Documentation



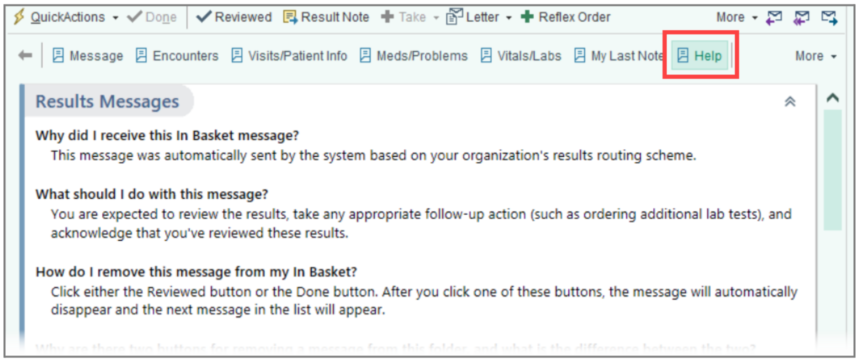
3. **Visits/Patient Info-** Shows the most current visits, the Care Team, Demographics, Emergency Contacts and the Preferred Pharmacy

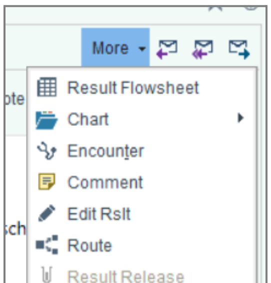
4. **Meds/Problems-** Shows current Medications, Allergies, Upcoming Health Maintenance and Current Problems

5. **Vitals/Labs-** Shows the most recent Lab Results

6. **My Last Note-** Shows your last Progress Note

7. **Help-** Very helpful if you are not sure how to deal with a message





You will also see a ‘**More**’ button. This will allow you to perform other actions based on this message

When a clinician reviews a Result message in their In Basket, they can easily navigate throughout the chart and take follow up actions from the **sidebar Result Note activity**.

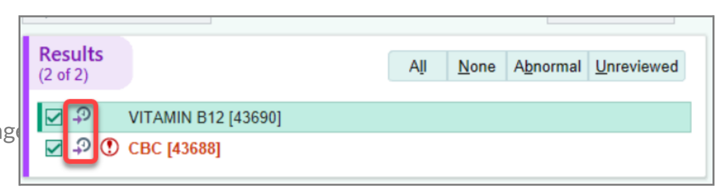
The result note opens in the sidebar of the patient workspace, showing an improved report about the result and related communications in the center of the screen.

- You can easily update your result note in the sidebar while clicking through the chart or searching in Storyboard to find any additional information you may need
- You can write comments for the patient to review in MyChart and set up notifications for unviewed test results without needing to open the separate Results Release activity. When you’re all done, you can click ‘**Accept**’ to automatically close the patient workspace and jump back to their Results In Basket folder or click ‘**Apply to Selected**’ to send the result note and remain in the chart
- You can route the result note, file a <progress note to the chart>, and release results to MyChart with additional comments in one smooth workflow

FYI

Results marked for manual release are not selected by default.

A Flagged for Review icon appears next to the check box to make it clear that the physician needs to take action before releasing it.

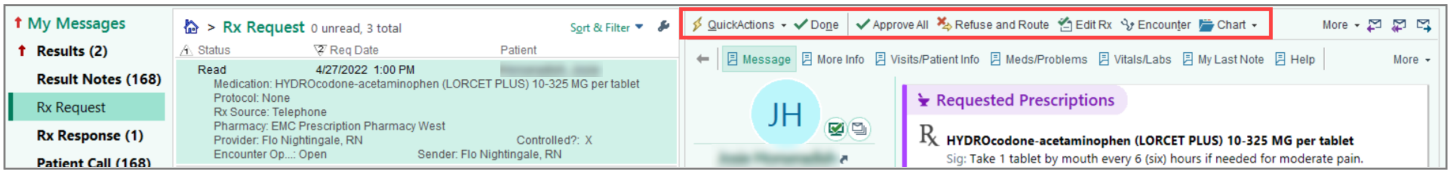


If the physician has already taken action to communicate with the patient and it's appropriate to release the result with the rest, they must select the check box separately.

Rx Request Messages

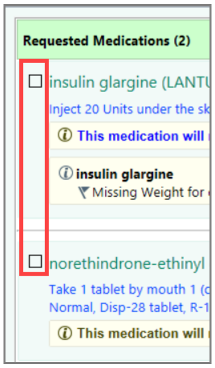
Here you will find the messages that have been routed to you from the Clinical Support Pool or directly from your MA’s or Nurses

These are Medication Requests that have come in from a Patients My Chart and you will need to decide which to refill, deny or route to a pool.



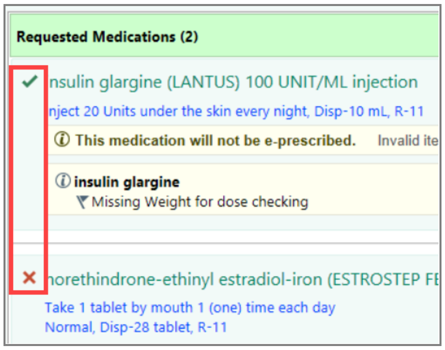
Your options are as follows:

- **<u>QuickActions</u>**- Use this if you have set up an appropriate Quick Action
- **<u>Done-</u>** Marks this message complete
- **<u>Approve All</u>**- Will approve ALL medication refill requests AND allow you to make any changes to the prescription
- **<u>Refuse and Route</u>**- Will deny ALL medication refill requests AND route to another user (Used when the Dr wants their MA or Nurse to contact the Patient about the denial)
- **<u>Edit RX</u>**- When there are multiple requests from the same Patient, you can approve some requests and also deny some requests in this single screen.



SINGLE clicking the box to the left will approve this Medication

DOUBLE clicking the box to the left will deny this Medication



- **Encounter**- Open an encounter if you call the Patient to discuss the request
- **Chart**- to do a deeper dive into that Patients health data

Exercises

On the far left, you will see a list of Folders that house different types of tasks.

There is a number next to the folder name that shows the **UN-READ** number of messages

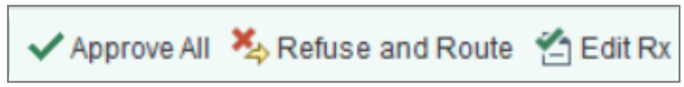
In our Results folder, we can see that there is a message about Josie's Metabolic Panel. You decide to route this message to the nurses pool so that someone can call Josie and let her know the results of the panel. You also want to release those results to Josie's MyChart

- **Single click** Josie's message
- **Select 'Result Note'**
- **Keep 'Route'** button checked
- **Enter "P Trn Nu"** to route this to the Nurses pool
- **Add** a brief '**Result Note'** in message body
- **Add** a '**MyChart Comment'** and **release results to the Patients MyChart**
- **Click** '**Accept'**
- This message is then sent to Nurse Pool (cannot be seen in ACE)
- Click '**Reviewed'** at the top of the message tool bar to complete this task

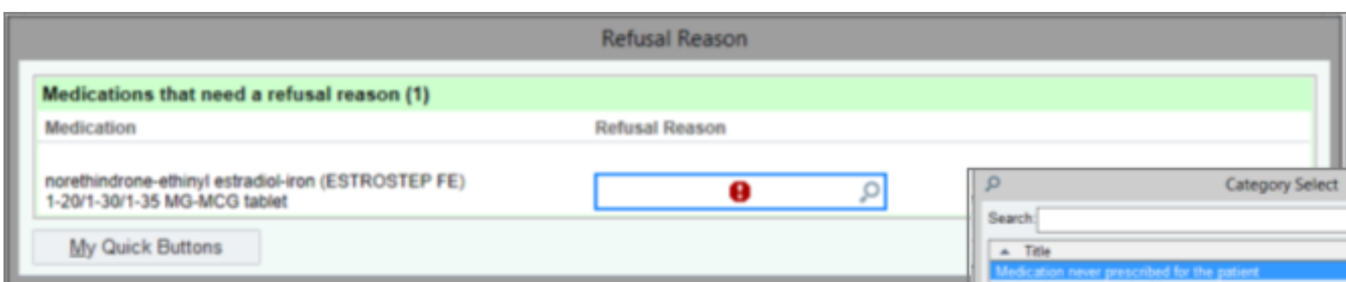
Now, lets work in some of the other folders!

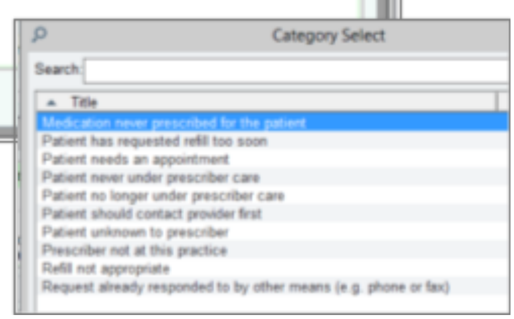
RX Request Messages

- <u>Go to the Rx Request folder and select the message from Chanda.</u>
  - For an Rx Request, we can either **Approve All, Refuse & Route** (Deny), or **Edit Rx** (Approve a modified prescription)



- We want to '**Approve'** the LANTUS script, but we will need the Patient to go to her OB/GYN or PCP for the birth control prescription
- <u>Select</u> the '**Edit RX'** button
- <u>Click the GREEN CHECKMARK next to the birth control prescription.</u>
  - This will change the icon to a red X
- <u>In the Notes box, enter that you have renewed the Insulin, however she will need to contact her OB/GYN or PCP to get the birth control renewed.</u>
- <u>Forward/Route to the nurse pool with this **routing comment**</u>-"Please call the patient to let them know that we have refilled the insulin and denied the BC and to reach out to PCP or OB/GYN"
- <u>Sign and Route</u>
- A new window will appear, asking for a reason that you denied one of the medications. Enter your reason here by clicking the magnifying glass to the right of the red exclamation point!

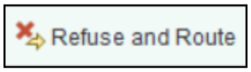




After clicking '**Accept'** your refills will be sent and this task will disappear form your In Basket!

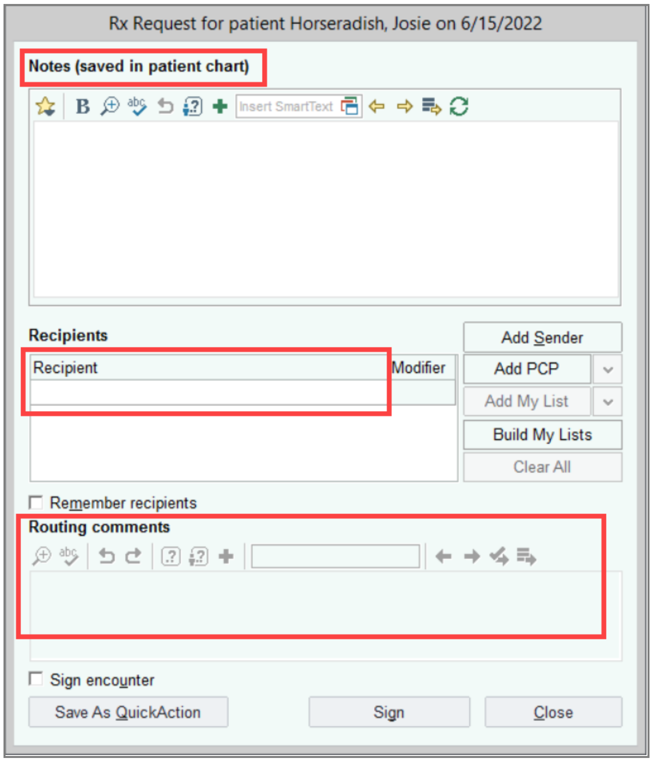
Now, let's '**Refuse**' a refill request

- Select the RX request message for Josie
- Select '**Refuse and Route'** at the top of the message toolbar



  - o Refusal Reason box pops up. Choose your reason for denying this refill and select '**Accept**' twice
- Next, route this In Basket message to your RN for them to schedule an appointment
- Enter '**Note**': "**Call patient after 4pm to schedule appt**"
- Click "Add Sender" button **(This will add the original sender of the message)**

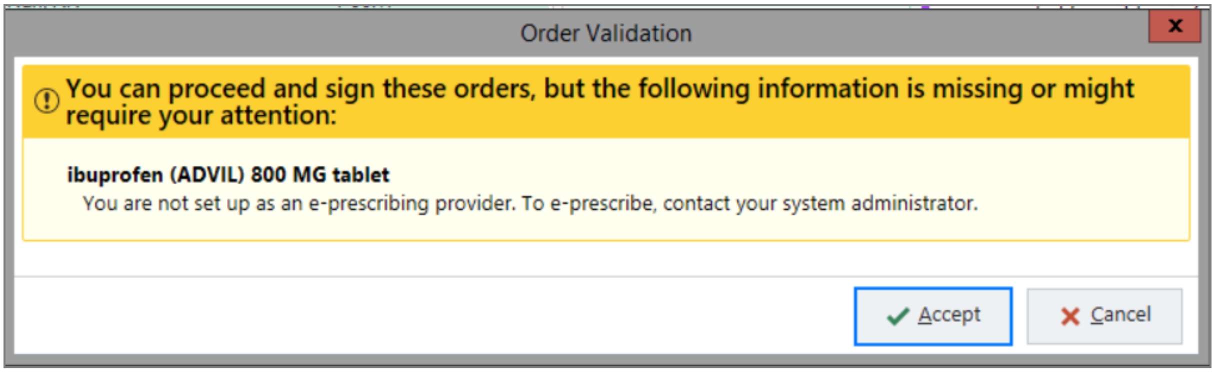
- Routing Comments: "**Pt wants you to call them at 222-333-4444**"
- Select '**Sign and Route**'
- Message disappears from your In Basket!



Next, let's take a look at **approving** a medication!

- Select our Janice patient's message
    - She is looking for a refill on her Ibuprofen, which we will **approve**
- Select '**Approve All**' 

    - In this case you see a pop-up for Order Validation. This alert will trigger when there is something that needs to be addressed or a notification. For Training today, click the '**Accept**' button to continue forward
    - If this were a real patient you would want to read the message and take the appropriate action



- Message disappears from your In Basket

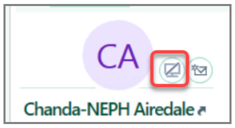
REMINDER

On the left, you will notice that the folder called '**Rx Request**' has disappeared! This is good! If there is no folder shown, there are no tasks to complete!

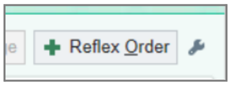
If it is still showing, click the '**Refresh**' button on the top toolbar.

Working with Results Messages

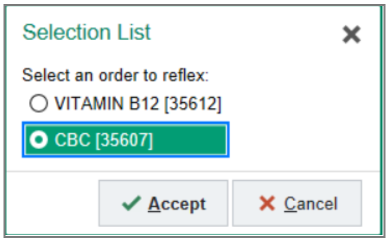
- We see 5 results for review in the '**Results**' folder, one of which is for Chanda
- In the **Message report** for Chanda we see abnormal results
- Due to these abnormal CBC results, we want to inform Chanda and order some follow-up labs, so we'll have a nurse contact her.
    - We can do this by writing a **Result Note** and placing a **Reflex Order**
    - Reflex order testing occurs when an initial test result meets pre-determined criteria (e.g., positive or outside normal parameters), and the primary test result is inconclusive without the reflex or follow-up test
- Select '**Result Note'**
    - We see the abnormal CBC in red
    - We see no results can be released to MyChart since she's inactive



    - Her Vitamin B12 looks normal, so we will not order a new test for that. **Deselect the check mark** in front of the Vitamin B12 result
- We will enter a recipient and a message, and then place our order
- First, we want to send this message to the nurse pool, so we will enter a 'p' followed by the name of the pool.
    - **You must enter P <space> name of pool to send pool messages** *(EUPA QUESTION)*
- Enter "**p trn nu**" in the Recipient field to send to nurse pool and press Tab.
- Type "**Call pt with abnormal results, have her come in to pick up a req for additional labs**"
    - Select '**Reflex Order'** at the top right side in the toolbar to order the new lab



    - Click in the radial for the test you want to order and select **'Accept'**



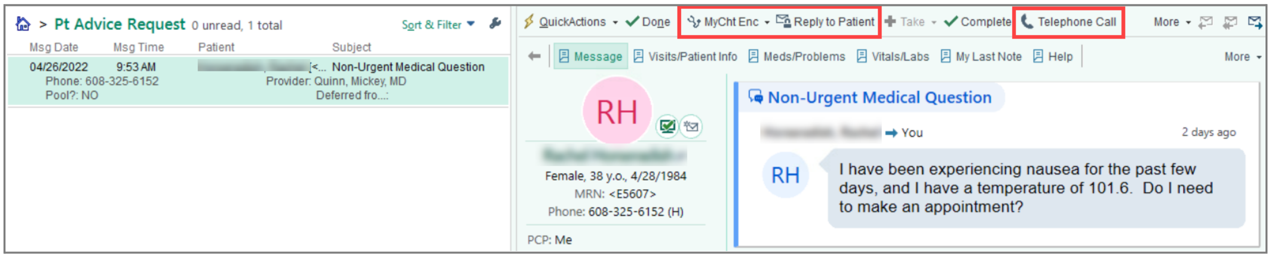
    - In this new window, find the Lab you want to order and **click** to add to the order box at the right hand side

- Select **'Accept'**
- Your order now appears in your Shopping Cart and is ready for any editing you may want to do!
- Associate Diagnosis
- Sign Order
- Close Chanda's chart and return to your In Basket
- In your InBasket, mark this message as '**Reviewed**' at the top of the message Toolbar

Stop here and wait for the Instructor

Patient Advice Request Messages

Another common message you'll receive is a Patient Advice Request message from MyChart



MyChart is the patient portal where you can send clinical messages to your patients, place orders, and do other charting

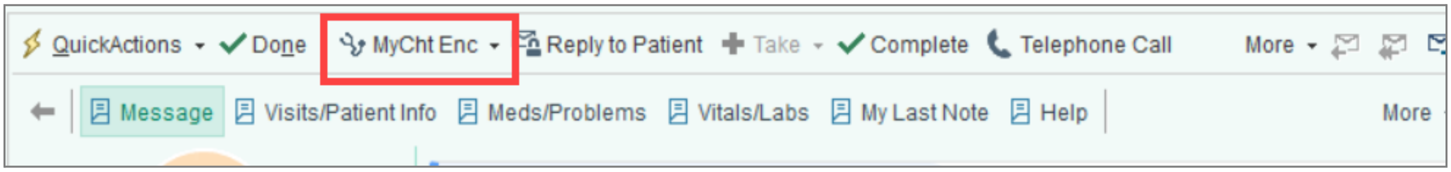
By default, these patient advice request messages are being routed to your nurse pool

If you needed to place orders or do other charting, you could open a '**MyChart encounter'**, document a phone call OR send a quick reply with the '**Reply to Patient'** button.

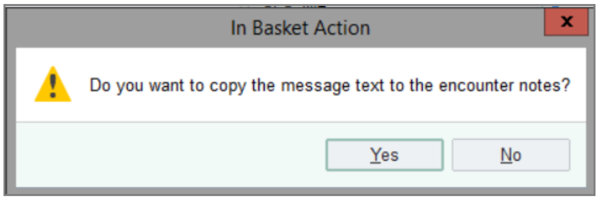
Open a My Chart Encounter

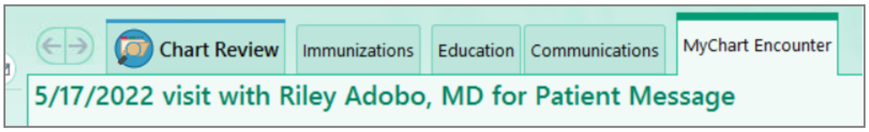
If you decide that you need to place an order for this Patient, you will need to open a '**My Chart Encounter**' to place those orders.

This is located at the top right hand side of your In Basket, right above the highlighted message.



You will see this Pop Up message. Answer appropriately and you will be brought to a '**MyChart Enocunter**' Activity Tab





In this screen, you can place orders as you normally would, as well as reply to the Patient.

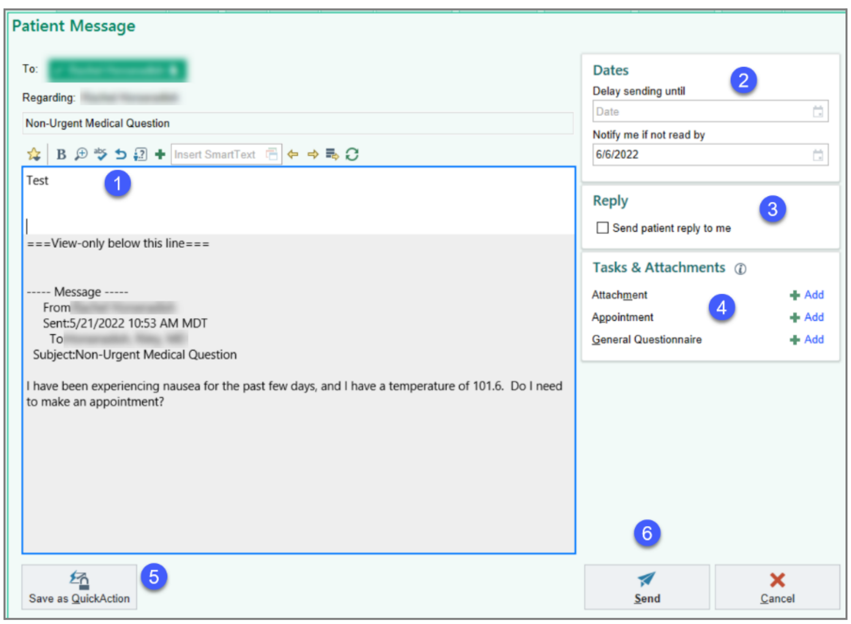
After placing and signing any orders, you would then respond to the Patient message.

Fill out the fields appropriately and then sign the Encounter.

That message has now disappeared from your In Basket!

Reply to Patient

If you decide that you do not need to create a telephone encounter and need only reply to this Patient, you will select the ‘**Reply to Patient’** button up above on the right hand side, above the message in the toolbar.

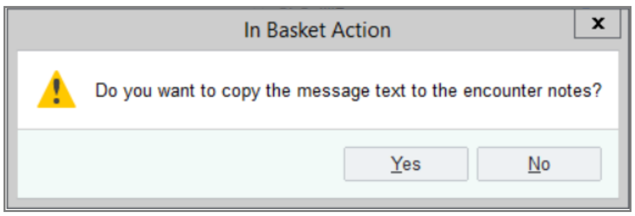


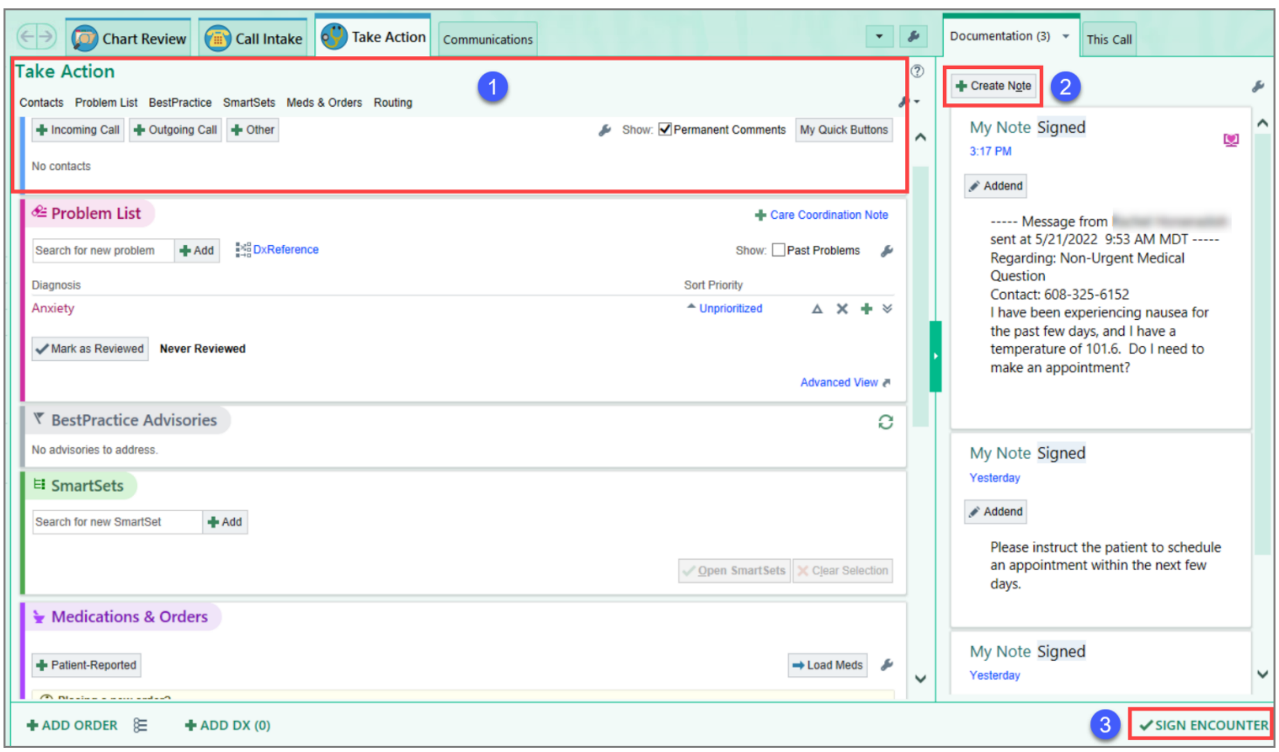
1. Enter your response here
2. **Dates**- You can set a delayed send as well as a NO READ option
3. **Reply**- To allow for direct replies to the Provider
4. **Tasks and Attachments**- to attach different items
5. **QuickAction**- Providers can save this reply as a template for future responses.
6. **Send**- Send the message to the Patient

Telephone Call

Providers can also document a Telephone Call to the Patient.

When the **'Telephone Call'** button is selected, the Provider will be prompted to decide if they want the original message text copied into the encounter note





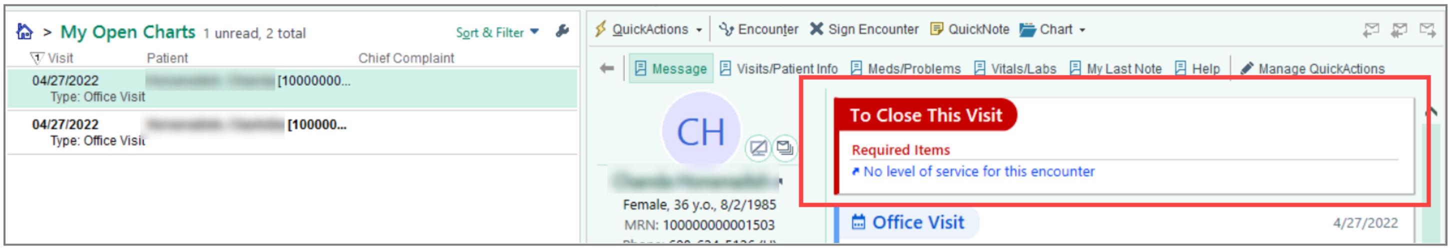
- **'Take Action'**- Document actions taken and to whom/when and results of the call
- **'Create Note'**- Document your findings
- **'Sign Encounter'**- Sign the encounter and close the work space

My Open Charts Messages

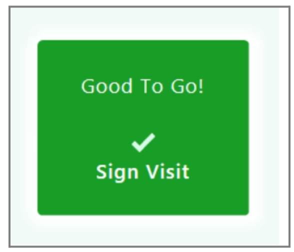
The last type of In Basket message we'll look at is a '**My Open Charts'** message

You will receive My Open Charts messages if you don't sign (close) an encounter **within 24 hours**

If you needed to resolve anything from this encounter, such as an unfinished note, unsigned orders, or a level of service for billing, a link appears at the top of the message. This allows you to fix the issue and sign/close your visit right from the In Basket!



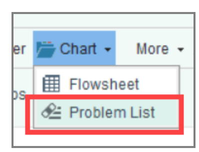
Once the items are resolved you will see '**Good to Go - Sign Visit'**

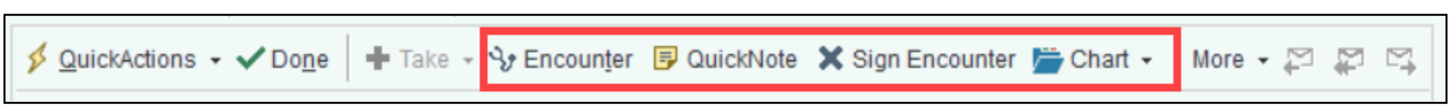


Patient Call Message

There are several ways that you can respond to a Patient Call message, depending on what the Patient is asking for

- Document a Telephone Encounter
- Write a Note
- Route an existing Telephone Encounter
- Order Clinic Administered Medications in a Telephone Encounter
- Use Chart to view the Problem List

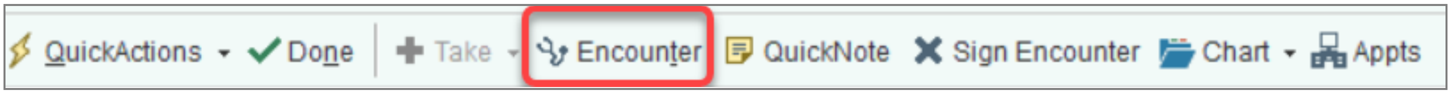




Documenting a Telephone Encounter

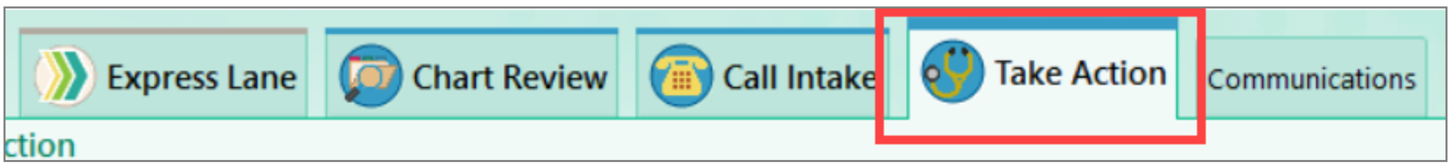
When you want to respond to a Patient call message, you will need to open a Telephone Encounter to document the call or document a note and route to another staff member.

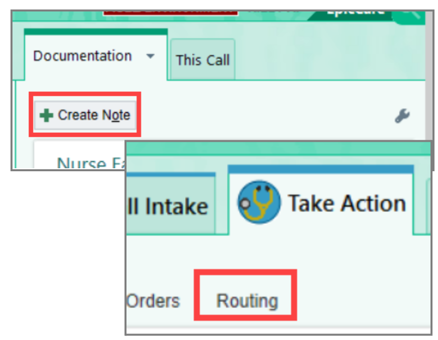
Single click on the message you are working with, and select the '**Encounter**' button up above the message on the right.



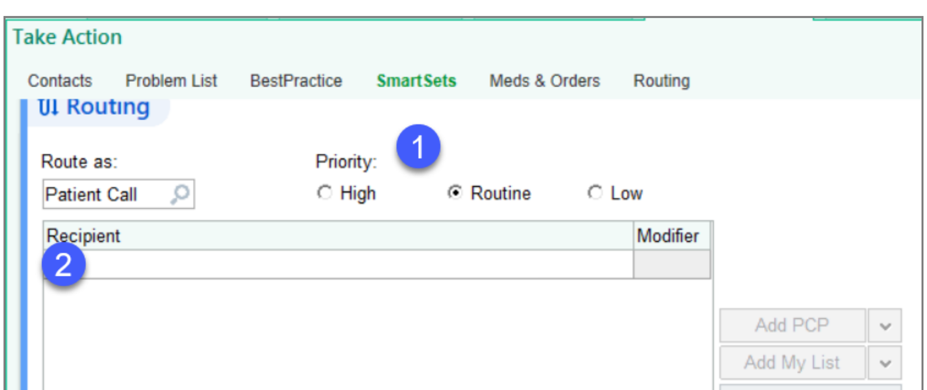
You are now in the Patient's chart, with a few new Activity Tabs up above.

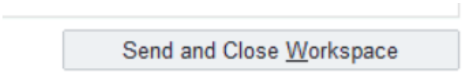
Let's start in the '**Take Action**' tab





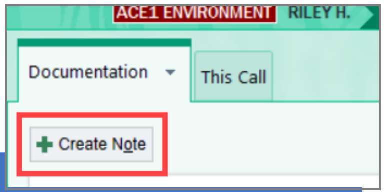
- First thing, select '**Create Note**' in the sidebar to the right
- Write your note. You can use full Note Editor functionality here, so all of your Smart tools are available!
- Once you have accepted the note, navigate to the '**Routing**' tab
- Fill out these fields as appropriate
  1. **Priority**- Pick the Priority of this message
  2. **Recipient**- You can submit to a Pool of recipients, or to a single person
  3. **Pool for Replies**- Here you can designate that replies ot this message will automatically go to the specified pool
  4. **Routing Comment**- Instructions to the pool or person you are routing to
  5. **Send and Close Workspace**- Closes the routing Activity and sends the message





Writing a Note

To the far right, in the sidebar, you will see the option to create a new note, or addend any notes currently saved to this encounter. Follow your practice's workflows to decide which option you will use.



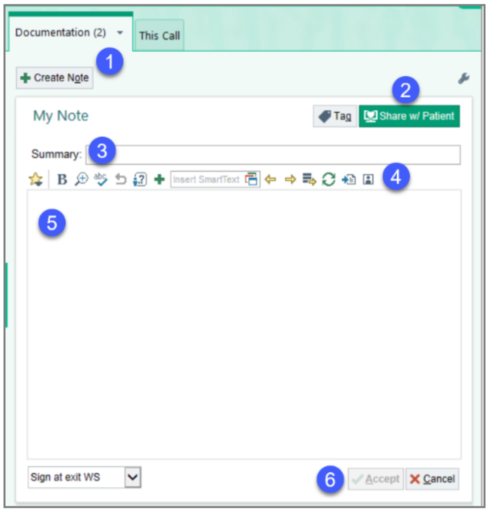
BACKPOCKET

By Default, this note **will** be shared with the Patient as soon as you sign the encounter

In this instruction, we will create a new note.

1. Create a new note by selecting the **'Create Note'** button at the top of your sidebar
2. Make any adjustments that you need for the **Release to Patient** function.

   Clicking on the button will open up a new window that you will need to complete. This window is asking for a reason that you are choosing to **NOT** release this note to the Patient



3. Enter a Summary if you would like.

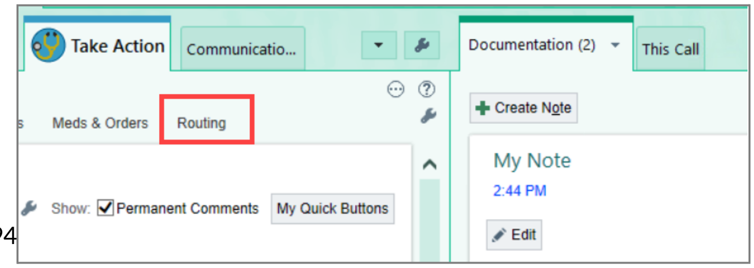
   This makes locating specific notes easier when in Chart Review
4. This is your Note Editor. Here you can utilize Smart Tools, pull notes from a previous visit, create new Smart Phrases and add different elements to your toolbar and note
5. Enter your note text
6. Select '**Accept**' to complete your note documentation

HYPERLINK

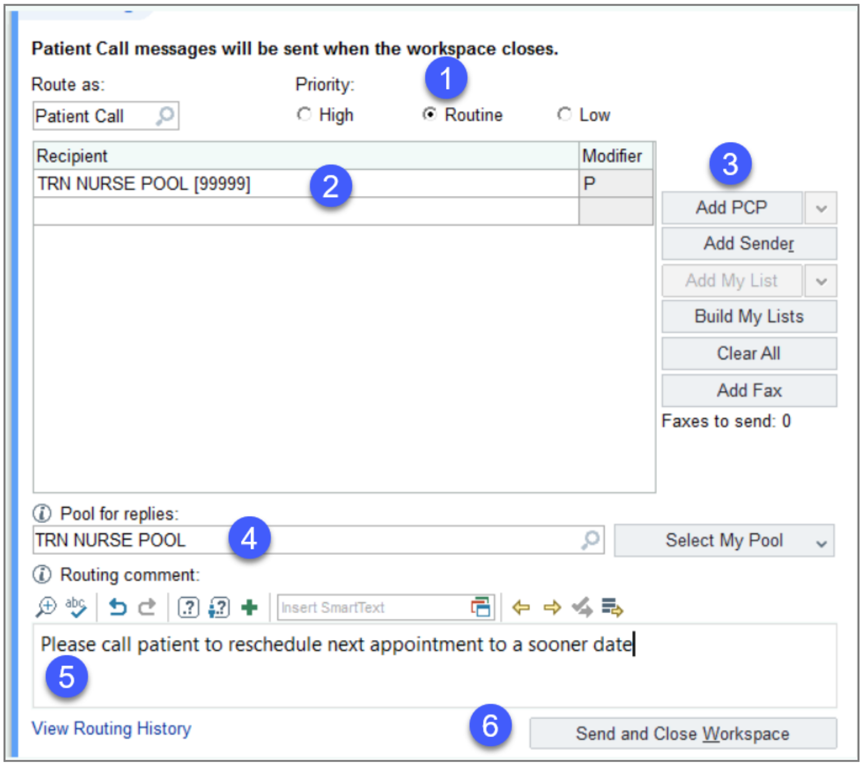
For more Information on creating notes and using your Note Editor, see "**Completing Your Progress Note**" section.

Routing a Telephone Encounter

Once you have completed your documentation fo this encounter, you can '**Route**' this to another Provider, your MA/Nurse or to a Pool.



Looking to the left after you complete a note, you will see some options that live under the **'Take Action'** Activity Tab. Select the **'Routing'** option.



1. Mark the message priority
2. Enter the Recipient or Pool
3. Add PCP if desired
4. Assign a Pool for responses
5. Enter a routing comment here.This is a message for the routing recipient specifically
6. Send and Close Workspace when finished

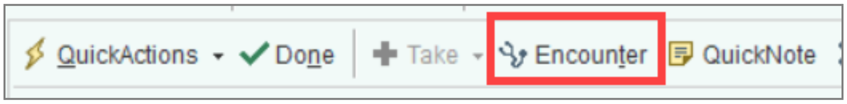
Ordering Clinic Administered Medications in a Telephone Encounter

In your In Basket **'Patient Call'** folder, you will see Patients that have called and their information was forwarded to you to handle.

You will need to open a new Telephone Encounter to document this interaction.

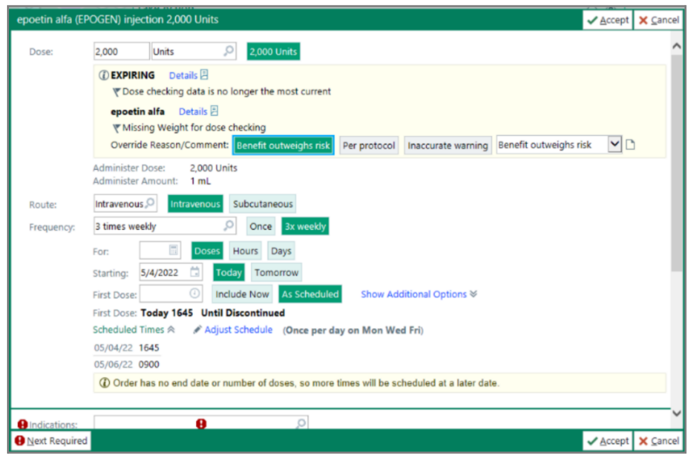
1. Single click the message to open up the options to the right

2. Select the ‘Encounter’ button at the top of your message



3. Add the Medication Order down at the bottom in your Visit Task Bar

4. Enter any data that needs to be completed withit the Order Editor screen and select **‘Accept’** when finished



5. Sign your orders and associate Diagnosis

6. Sign your Encounter and mark the message as **‘Done’** when taken back to your In Basket

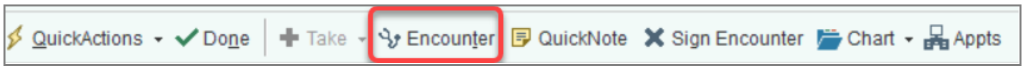
Exercises

Monica calls the clinic because she's been having some trouble keeping her pain meds down. She is requesting an antiemetic.

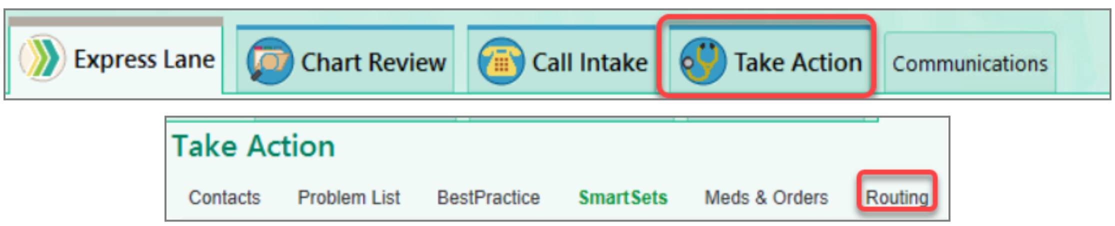
Documenting a Telephone Encounter

Find your Monica message under the '**Patient Call**' folder (It is located at the **VERY end)**

- Single click on the message
- Open an Encounter



- Select '**Create a Note'**
    - o Use the following SmartPhrase- **".fname (tab) was recently here for a visit, but has since developed nausea symptoms. Advised her to purchase OTC medication"**
- Accept the note
- Route the note back to nurses pool (In the **'Take Action'** Activity Tab)



- Type a comment to the nurse
- '**Send and Close'** Workspace
- You will be taken back into your In Basket. Mark '**Done**' for this message

Ordering Clinic Administered Medications in a Telephone Encounter

Rose called and spoke to your nurse about a headache when she takes her new medication. She states that the first few days were symptom free, however for the past 4 days she has developed a headache after taking the meds. She is concerned that she might be having a reaction and wonders if she should come in or if there is another med option she could try?

- Find Rose's '**Patient Call'** Message
- Open Encounter
- Add Procrit (Use the 1st option)
- Seelct a reason for a weight override
- Use Anemia for indications
- Accept
- Associate Diagnosis (Your choice)
- Sign Orders (For today, we will PEND due to Training Limitations with E-prescribing)
- Return to the In Basket and '**Done**' this message

Stop 

here and wait for instructor

Documenting a Visit with the Express Lane

CKD EHR by Epic- Custom Express Lanes

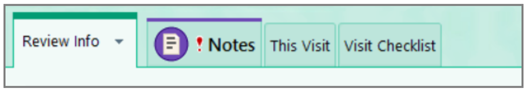
An Express Lane streamlines your orders and documentation to decrease time spent in the system. CKD EHR has five custom Express Lanes triggered by the chief complaint entered in the Reason for Visit section of the Rooming tab:

1. Chronic Kidney Disease
2. Transplant Management
3. Hypertension
4. Nephrolithiasis
5. Other Renal Diseases

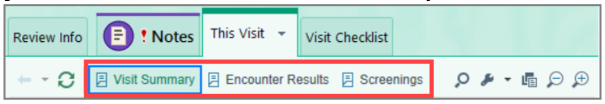
Reviewing Patient Data after Rooming

Review Info sidebar: this is where a provider can see a Patients allergies, medications, problem list, and history at a glance. This information was pulled from the Patients chart as well as the information provided by the Nurse or MA when rooming this patient.

- Scrolling down the sidebar youwill see the **Mark All as Reviewed** button at the bottom. Marking as Reviewed helps support your MIPS. When you click Mark as Reviewed, you overwrite the Nurse's timestamp with your own
- Other Tabs in the Sidebar are helpful to look at as well



  - o <u>**Notes**</u>- This is the sidebar Tab that allows for note taking while exploring the Patients chart. No matter where you go within the chart, the Notes tab is always right there and able to be documented in without going to another screen or window
  - o <u>**This Visit**</u>- This tab shows you the **Visit Summary, Encounter Results** and any **Screenings** that have been completed. This is especially useful for VBC and CHE visits



- o **<u>Visit Checklist</u>**- This tab contains the Meaningful Use Checklist and Quality Measures. Ties directly to MIPS data

When your nurse/MA rooms a Patient, they will document the following types of information on the Rooming tab:

Reason for Visit	Family History
Vitals	Tobacco and Drug Use
Allergies	Preferred Lab (Resulting Agency)
Current Medications	Manual External Results Entry
Past Medical History/Surgical History	My Chart Sign Up

Trend Synopsis Data

A powerful way to see how a Patients labs and medications trend over time and respond to treatment, is with a tool called Synopsis.

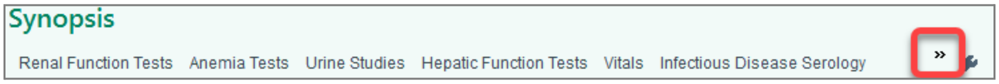
- Synopsis graphs results against other items like vitals, medications or procedures.
- Used to display trending data (e.g. lab results, medications, vitals etc.) and the data can be easily incorporated in a patients encounter.
- We have added roughly 1,000 result components to Synopsis, updated the '**Default**' view and prioritizing the lab results that are most important to you!
    - o There are various Synopsis views to choose from located across the top of the activity.
        - ▪ Upon selecting a tab, the initial panel will be displayed and the remainder of panels will be collapsed. You may expand as needed.
        - ▪ You can change the order via the filter using the wrench.
        - ▪ Patient Spotlight + allows users to select additional labs for view on their patient

- You can trend Medications with Labs

- You can select check boxes to graph several lab results, medication and/or vitals **(Up to 4 values)**
- **More Icon-** Offers more options for data review

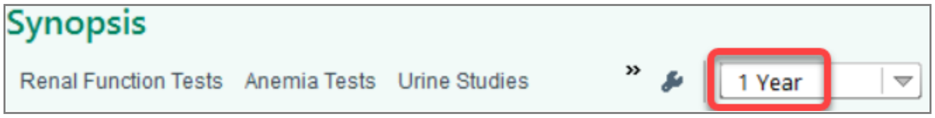
For example, let's look at Renal Function Panel Results

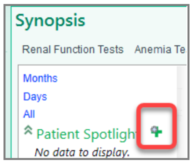
- Navigate to the **'MORE'** arrow to see other options you can choose



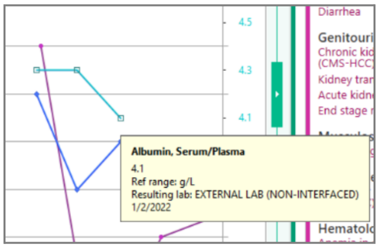
- For this example, let's choose to highlight the '**Renal Function Panel'** at the top of your '**Synopsis**' window

  - Adjust time Frame back to 1 year, if not the default





  - Select the +green icon for Patient Spotlight to add specific LABS that you want to be pulled into your note
  - Click to select the **Patient Spotlight** labs that you would like to see on the graph to the right



  - Hover over points in the graph to see results
  - Navigate to the Renal Function Tests section/tab and select a couple of labs under the renal function panel.
  - Pin them to show how they display in the **Patient Spotlight**

BACKPOCKET

Select the + green icon for **Patient Spotlight** to add additional data that you want to be pulled into your note! **ONLY** data that is added to the Patient Spotlight will be pulled automatically into your note. However, by right clicking on the graph, you can chose to **COPY** or **PRINT** the data.

By choosing **COPY**, you can then paste that data into your note manually.

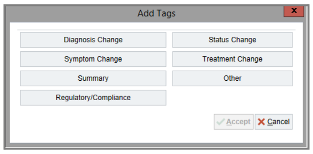
BACKPOCKET

Right click on graph to show Copy and Print options. If you choose to copy, you will copy in discrete data points and can paste them into something like your Note.

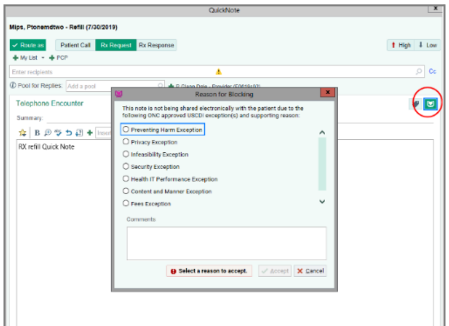
Starting Your Note

Looking at the top of this note, we can see that there are several icons that can be used:

- **Sensitive**- Marking a Note as **Sensitive** will ensure that this note will NOT be visible to other providers or staff that are NOT on the Patients Care Team. It will, however, be shared with the Patient through My Chart!
- **Tag**- You will also see an icon with a tag. This option allows you "**tag**" information as it occurs for reference later. Example- when a DX changed from CKD 3 to 4



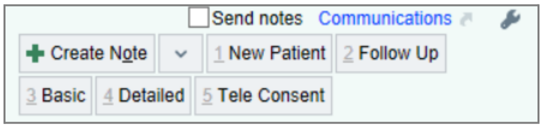
- **Share w/Patient-** There is a "**Share w/ Patient**" button at the top of the Note Editor that is selected by default. All notes will be automatically sent to any Patients that have My Chart after the visit.



- Should you decide to NOT share this note, you will need to click the '**Share w/ Patient'** icon to de-select this rule. You will then be prompted to list a reason why you have chosen to not share this note

Depending on your practice workflows, your Nurse/MA may have started your note for you with the Template that your practice uses, or that you have created for your own notes.

There are 5 created templates that you can use in their entirety, or as a base for your own templates.



1. **New patient**- Subjective, ROS, Objective, PE, A/P
2. **Follow Up**- Subjective, ROS, Objective, PE, A/P
3. **Basic**- PCP, History of Present Illness, ROS, PE, Medications, Labs/Imaging (with Synopsis data), A/P, Recommendations, Future Appointments
4. **Detailed**- PCP, History of Present Illness, Past Medial History, Past Surgical History, Social and Family History, Medications, Allergies, ROS, PE, Labs/Imaging (with Synopsis Data), A/P, Recommendations, Future Appointments
5. **Tele Consent**- Verbiage specific for a Telehealth Visit

> Patient seen via Telehealth with their originating site *** with Provider distant site ***.
> Consent Obtained for use of Telehealth this Encounter: {TELEHEALTH VERBAL CONSENT:22200::"Yes"}
>
> This visit was conducted using live two way {communication method:24480} communication.

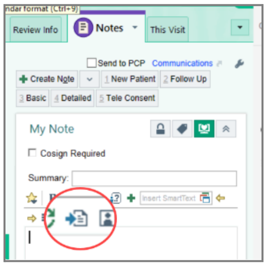
SmartTools

Tool	What is it?	How do I add it to my note?
SmartText	Preconfigured template, often containing SmartLists and SmartLinks	Search in the Insert SmartText field Insert SmartText
SmartList	List of values (text or numbers) to choose from while completing note called out with brackets { }	Press F2 to open the first incomplete list. Then left-click to **pick**, right-click to **stick**.
Wildcard	Three asterisks ***	Embedded in templates. Press F2 to highlight and replace with free text
SmartLink	Short phrase that pulls information from the patient's	Search for SmartLinks using the Butler or type a

Copying a Previous Note into your current note

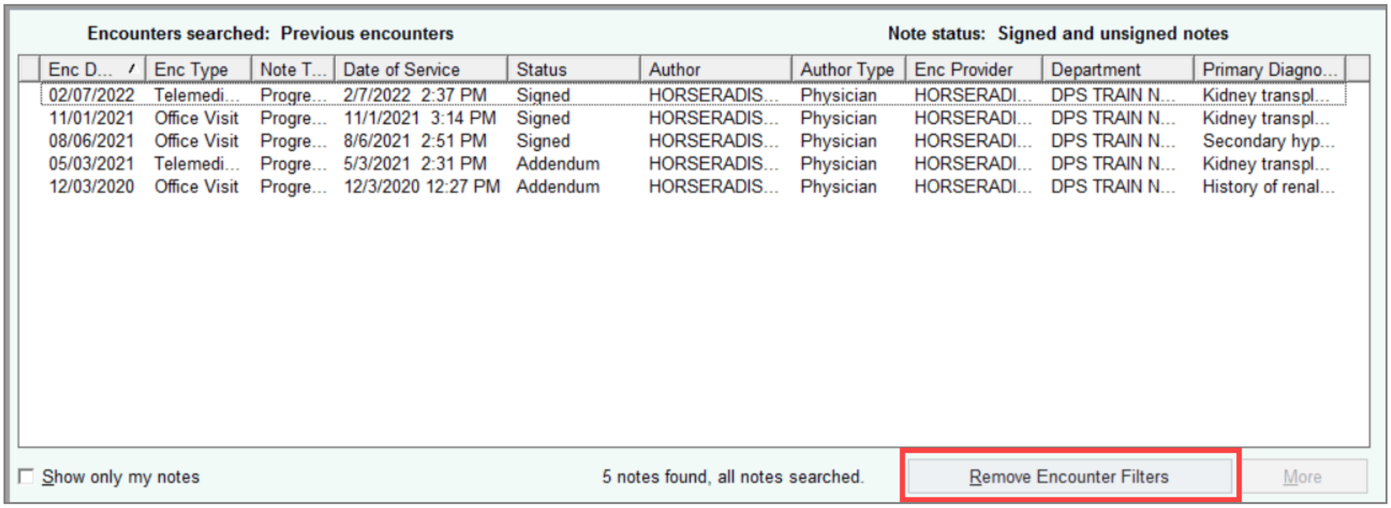
Copy previous functionality should only be used when the included wording accurately reflects and represents the care and observations from that specific patient visit.

Copy previous should not be inserted to any patient record without careful review. All copied from previous text must be thoroughly evaluated for appropriateness to the specific encounter.



1. Within an Open Note, place your cursor where you want to add some text or all of the text from a previously written note and select the '**Copy Previous Note'** icon from the Notes toolbar

2. In the Copy Note window, select the '**Remove Encounter Filters'** button and the **'More'** button (If needed) to see a full list of Notes written on the patient
3. Highlight the note you would like to copy from. You will see a preview at the bottom of this window of the notes contents

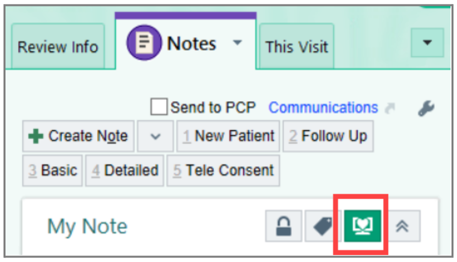


Enc D...	Enc Type	Note T...	Date of Service	Status	Author	Author Type	Enc Provider	Department	Primary Diagno...
02/07/2022	Telemedi...	Progre...	2/7/2022 2:37 PM	Signed	HORSERADIS...	Physician	HORSERADI...	DPS TRAIN N...	Kidney transpl...
11/01/2021	Office Visit	Progre...	11/1/2021 3:14 PM	Signed	HORSERADIS...	Physician	HORSERADI...	DPS TRAIN N...	Kidney transpl...
08/06/2021	Office Visit	Progre...	8/6/2021 2:51 PM	Signed	HORSERADIS...	Physician	HORSERADI...	DPS TRAIN N...	Secondary hyp...
05/03/2021	Telemedi...	Progre...	5/3/2021 2:31 PM	Addendum	HORSERADIS...	Physician	HORSERADI...	DPS TRAIN N...	Kidney transpl...
12/03/2020	Office Visit	Progre...	12/3/2020 12:27 PM	Addendum	HORSERADIS...	Physician	HORSERADI...	DPS TRAIN N...	History of renal...

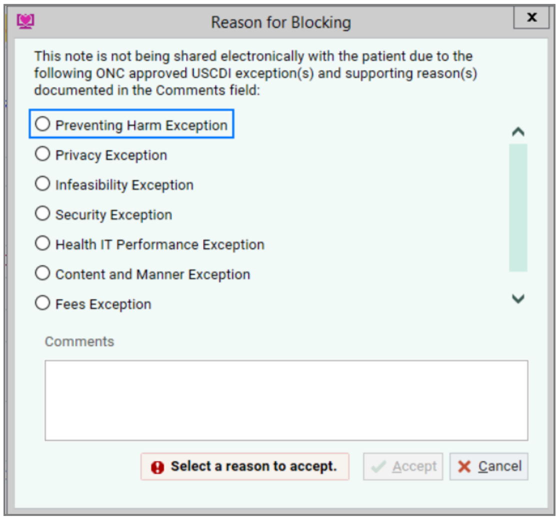
- To add the **ENTIRE** note text, simply click once to highlight the note you want to copy and then select **'Accept'**
- To add **PARTS** of the note text, highlight the desired text parts and then select the **'Add Text Only'** button

Sharing Your Note

By default, any completed Providers note will be shared with the Patient. Should you decide that the note should not be shared, you can click to deselect the green icon at the top of the note editor window.

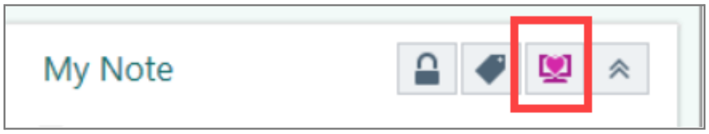


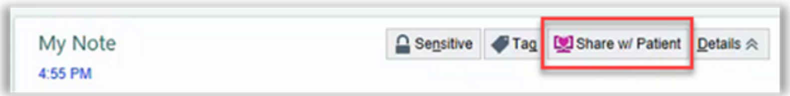
When selected, a new window will appear that requires you to select the reason that you are not sharing this note with the Patient.



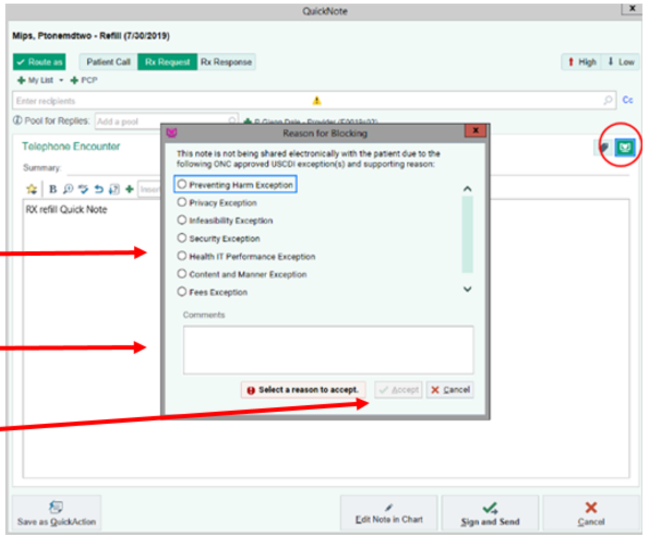
Select the reason you are not sharing this note, add any comments you deem necessary and then click ‘**Accept**”’

Once you have accepted the note, you will see that the sharing icon has greyed out. This means that the note will NOT be shared.



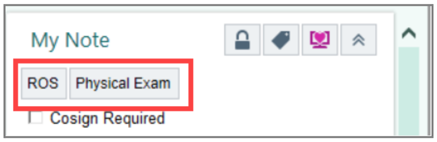


1. Deselect the ‘**Share w/ Patient** ‘ button located at the top right corner of your note editor.
2. In the following Pop-up window, select your reason for NOT sharing the note.
3. Add any Free Text information needed for justification in the ‘**Comments**’ section
4. Select ‘**Accept**’ when finished

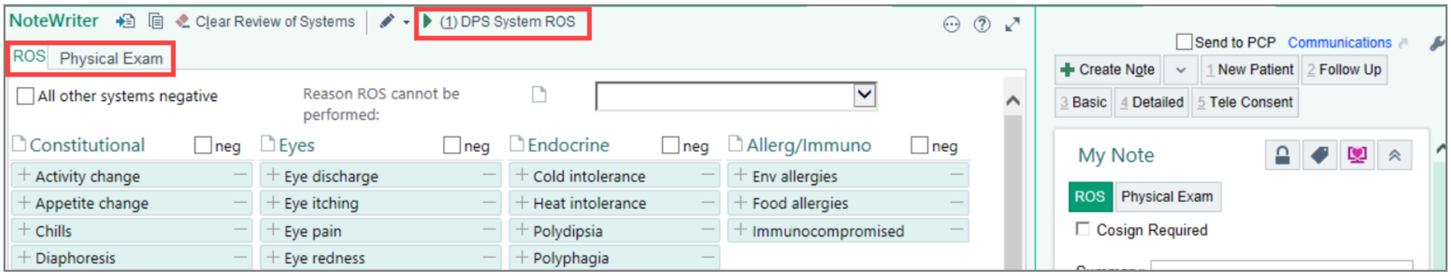


Documenting Review of Systems and Physical Exam with Note Writer

Once the note template has been selected, you will see the ‘**ROS**’ and ‘**PE**’ speed buttons at the top of the note editor



Selecting one of these buttons will open up the appropriate screen to the left



You will see that there are 2 tabs up above on the left. This allows you to click the tab of the exam that you are working on and then moving to the second exam without leaving this screen

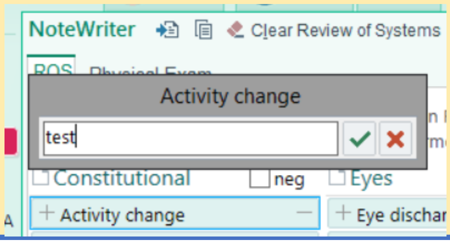
You will also see that the chosen template is displayed at the top. To edit this template, you can select the pen icon to the left and make appropriate changes as needed

As you go through the exam, clicking on the + and – for each symptom will mark that as either a positive or a negative symptom

Your note to the right will reflect your entries in live time as you complete the different data fields

FYI- IMPORTANT

You can add comments about a symptom by **hovering over the symptom and typing.** As you type, a new, small box appears that captures your entry. Click the green check mark to complete the comments.



Exercises

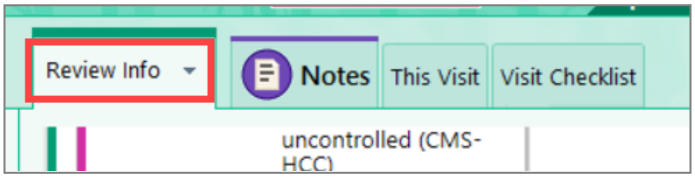
Let's start documenting your Norman patient's visit!

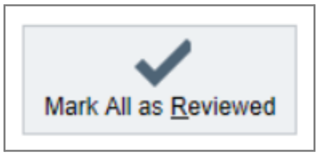
In your Provider schedule, double click on Norman's appointment to open his chart and start his visit.

- Select '**Let's Go**'

You are in the '**Express Lane'** Activity Tab and ready to start documenting!

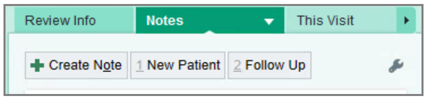
Complete a quick review of Patient data in the sidebar to the far right. This data was captured by the rooming nurse or MA, however you will still need to '**Mark as Reviewed'** at the very bottom for MIPS measures!





Starting Your Note

- Use the sidebar to open the **Notes** activity
- Select the **'Follow-Up'** note template
- Select **F3** to open note to full screen

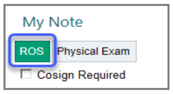


  - **Legend:**
    - Blue Sections= Refreshable SmartLinks. These pull in relevant data that has been documented elsewhere in the chart
    - Orange Sections= SmartBlocks. These are used to pull in templated documentation called SmartForms
    - ***= Wild cards. These are required placeholders in the note for you to use free text documentation. Use your F2 key to go to the next required field!
    - **Squiggly Brackets/Braces { }=** These are a SmartList Data element
    - **SmartList=** These are drop down lists that allow you to choose your data

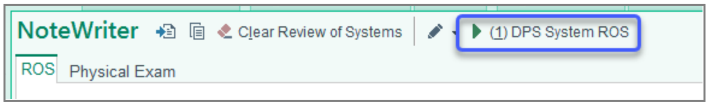
- Begin writing your note. You are starting this note to be ready when you are done with this patient.
  - Once you have documented all other data within the chart, you will need to refresh your note before signing the visit!
  - This is not a required work flow. You can decide to not start your note until finished if you like. Its up to you!
- To start navigating within the note fields, press your **F2** function and you will be taken to the first required field. Or, you can also use the arrows at the top of the note editor.

Documenting Review of Systems and Physical Exam with Note Writer

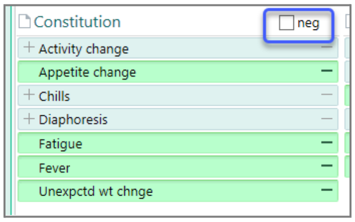
Select the "ROS" button at the top of your note window



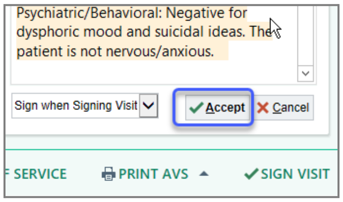
- <u>Select **(1) DPS System ROS** at the top of your Note Writer window.</u>



- <u>Select </u>**‘Apply Macro’** in the window that pops up
  - This will pull up the predefined template that you can use
- <u>Practice documenting with NoteWriter</u>
  - Remember, you can select the “neg” box located at the top right of every ROS section to document all negative findings in a section.



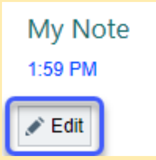
- <u>When you are done, “**Accept”** your note at the bottom, right corner of your screen.</u>



BACKPOCKET

When you ‘**Accept**’, you are not signing the note!

The note can be edited later in the visit or later in the day by selecting the ‘**Edit**’ button at the top of your note



Stop  here and wait for instructor

Updating the Problem List

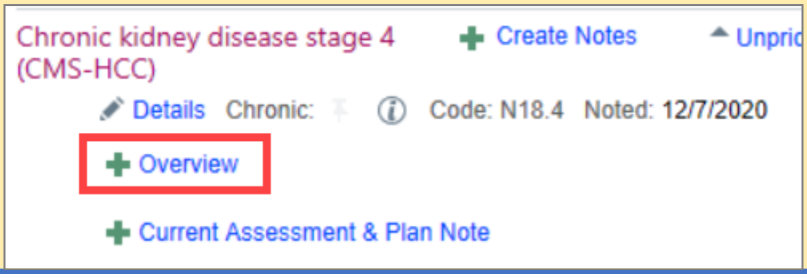
The Problem List is a tool to help easily identify and manage patients presenting medical problems at any point in the care continuum.

All physicians, PAs and NPs, including specialists are responsible for updating on behalf of the patient.

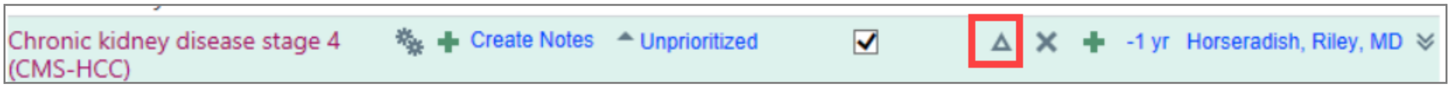
Any diagnoses and conditions that a patient is actively/currently experiencing (or potential future) or may require repeated visits go on the Problem List. Whereas, problems that the patient has experienced in the past should be updated on the Medical History (Past Medical or Past Surgical History) list.

BACKPOCKET

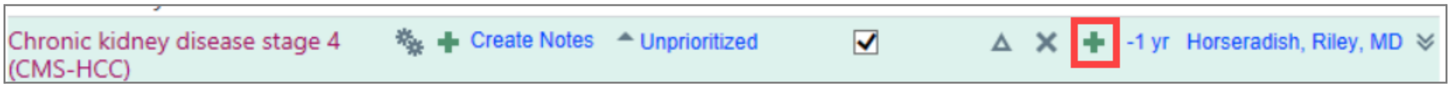
The '**Overview**' button is used to note patient specific goals (i.e. GFR/60) and will be available across visits until it is updated. This note gives you the ability to document things like the history and progression of the problem



You can also Make a Diagnosis more specific, change the Diagnosis or delete a Diagnosis on the Problem List by selecting the triangle to the right of the Diagnosis.



You have the option to add the Diagnosis to the '**Visit Diagnosis'** by selecting the green plus sign.



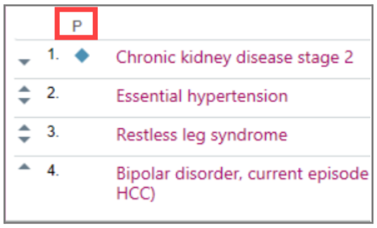
Adding the Visit Diagnosis

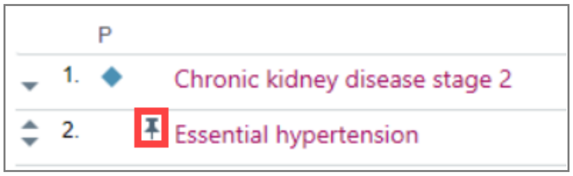
Next, we'll move onto adding the Visit Diagnoses. The '**Visit Dx'** is the Dx that is being addressed during **THIS VISIT**, whereas the '**Problem List'** is an ongoing list of problems the patient is currently experiencing.

This is the list of diagnoses you want to bill for this visit.

The most efficient workflow is to **first add diagnoses from the problem list**, then enter any acute diagnoses here related to the specific problem/Dx. To add a Visit Diagnosis from anywhere in an office visit, you can use the '**Add Diagnosis'** button on the Visit Taskbar at the bottom left of your screen.

- We can always change which diagnosis is listed as primary within the visit DX
  - <u>Click in the **'P'** column</u> to change the primary diagnosis and move the blue diamond
  - This will be the first diagnosis that appears for this visit in Chart Review
  - **Push pin:** indicates a problem is chronic (If you do not see a push pin, click on the **'Diagnosis'** and check the '**Chronic'** box. Then, click '**Accept'**)



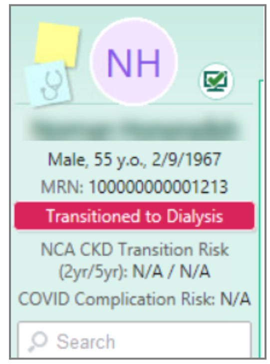


BPA's

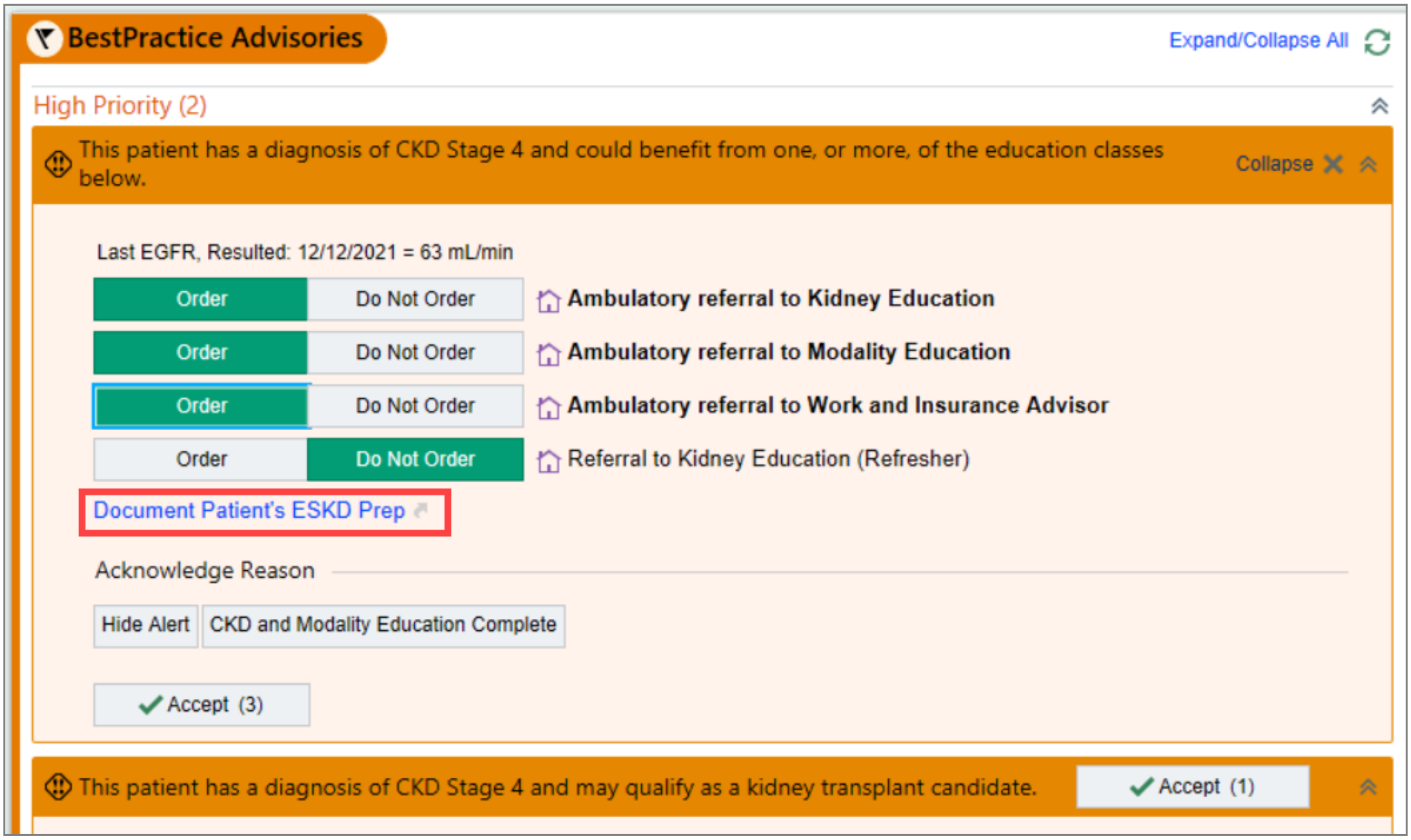
Best Practice Advisories (BPAs) is a decision-support tool making you aware that a patient may meet certain criteria.

For example, BPAs will help present options to Providers based on common orders to be placed as the patient's CKD progresses (Examples: Kidney Education, Modality Education, and Referral to Vascular Surgeon).

When a diagnosis code of N18.6 (End Stage Renal Disease) is added to the patients problem list, a new ESKD flag/identifier displays in Storyboard indicating that patient has transitioned into ESKD/Dialysis



Any documenting within the BPA screen will automatically populate that data to the ESKD Prep Activity Tab. There is also a blue Hyperlink within the BPA that takes you to the ESKD Prep Activity Tab



__CKD EHR Best Practice Advisories that are available:__

- **Kidney Health Education Referral** (criteria = CKD Stage 3)
- **Kidney Health Modality/Education Referral** (criteria = Stage 4)
- **Modality Selection and Referral for Modality** (criteria = Stage 5)
- **Transplant Center Kidney Evaluation Referral** (criteria = Stage 4)
- **MU CMS 134V5 Stage 3** (criteria = missing urine protein screening for patient with diabetes)
- **Has CKD and Needs Labs** (criteria = on CKD registry and no eGFR or UACR within the last 90 days)
- **Low Risk – Ebola Screening**

- **High Risk – Ebola Screening**

Best Practice Alerts will display based if CKD stage 3, 4 or 5 is on the patients Problem List or Visit Diagnosis

Medication Review

The Medication Review is normally performed during the Rooming process. However, a Provider will still need to review this information with the Patient.

To access the Medication Review functions, navigate to the Express Lane tab within the Express Lane Activity Tab.

FYI- IMPORTANT

Providers can mark a Patient Reported Medication as '**Not Taking**' in the '**Rooming**' tab.
This cannot be accessed through the Express Lane!

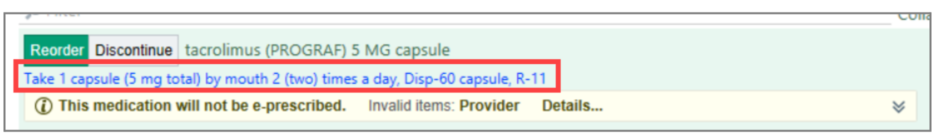
Reordering

At the very top of your window, you will see a double arrow drop down next to the Patients relevant meds. Selecting this will open up a list of all the medications that this Patient currently has in their chart.

From here you can reorder, discontinue or adjust **CURRENT** medications as needed

BACKPOCKET

To adjust a current medication, select the '**Reorder**' button, click on the blue hyperlink and make your adjustments in the following window!



Adding/Searching

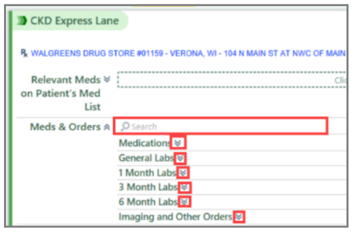
Below the '**Relevant Meds on Patient's Med List'** section, you will see '**Meds & Orders'** section.

Here is where you will go to **ADD** new medications or orders. You can do this one of 2 ways;

1. The Search Function
2. The Preference List

Searching for a Medication or Order within the Express Lane

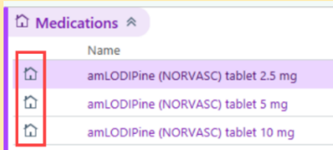
When you are looking at the **'Meds & Orders'** section, you will see a set of drop down arrows. Selecting these will open up options for you to choose from.



You can also start typing the name of the med/order in the **'Search'** box to locate what you want quicker than scrolling.

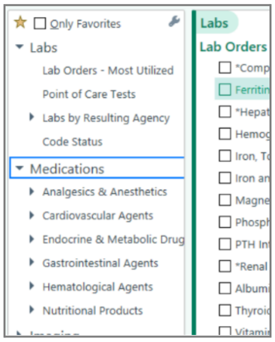
BACKPOCKET

The House appears for prescription medications. You should select an order with the house icon unless a medication will be administered in a clinic (syringe icon)



Using the Preference List within the Visit Task Bar

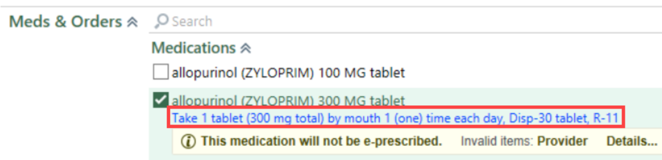
At the bottom of your screen, you see that you have an Icon for your Preference List. This Icon looks like Lollipops laying on their side.



Accessing this list can help you locate different labs and medications based on type/use/time frame or other elements.

Selecting the drop down arrows will expand and open up the options for each section.

Modifying Medication Prescriptions



To Modify any prescription, simply click on the blue Hyperlink to open the order editor.

In cases where the value in the '**Administer Dose**' or '**Administer Amount**' field is redundant with the dose itself, such as for inhalers dosed in puffs, the Order Composer no longer shows those fields.

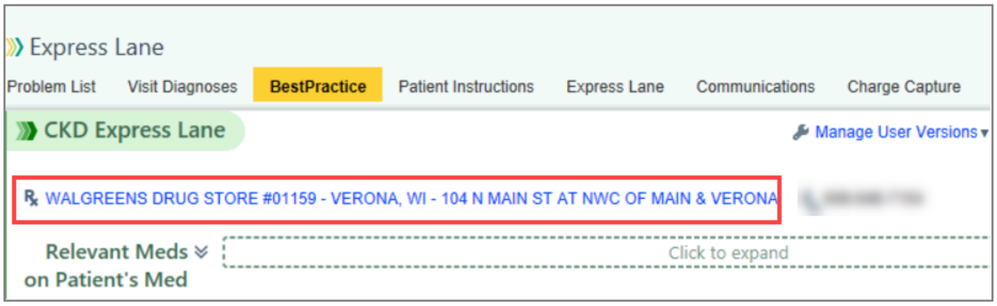
- In cases where a dose is weight- or BSA-based, the weight and BSA information appears on the weight buttons

Notice the Patient Sig Add additional information Hyperlink? This allows for a free text addition!

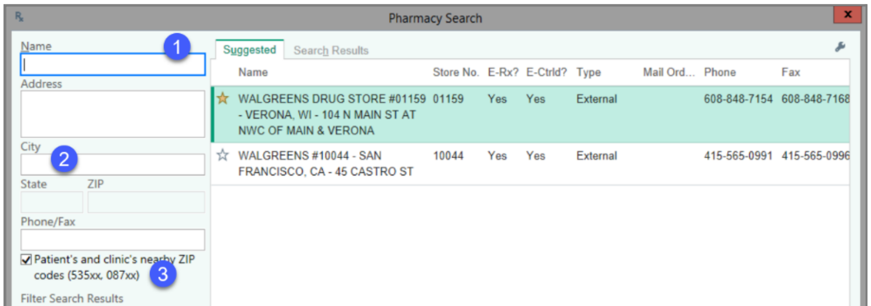
- The free text is helpful when writing a prescription that can't be captured with discrete button options, like a taper, loading dose or ointment amount (i.e. use a 'dime sized amount of ointment'). Zoloft is used with Taper/Ramp for example

Patient Preferred Pharmacy

Before any medications can be sent out, you must confirm the Patients preferred pharmacy.



At the top of your window, you will see blue hyperlink with the Patients Preferred Pharmacy. Verify that this pharmacy is still the preferred choice. If this space is blank, or the Patient wants to use a different pharmacy, you would still click the blue link to go to the search window.



1. **Pharmacy Name-** Enter the Pharmacy name here

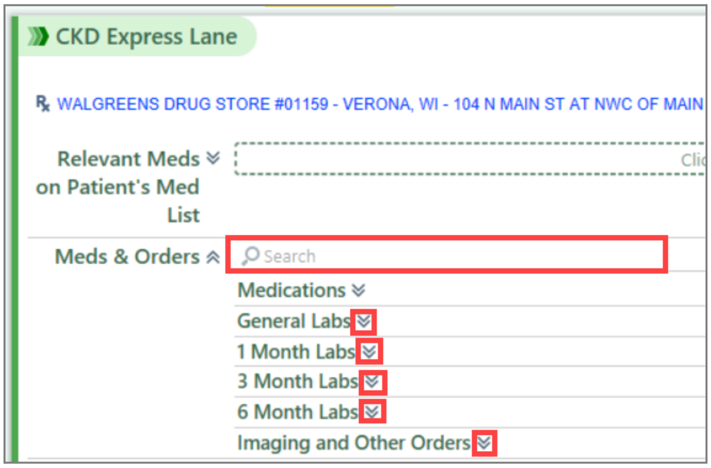
2. **Location City**- This helps to narrow down the search
3. **DESELECT this!**- This will significantly reduce your options for a pharmacy if left selected
4. **Specify Pharmacy type-** Useful for searching for mail order pharmacies
5. **Accept-** Will take your choice and add to the Patients chart

Preferred Lab/ Resulting Agency

- If you have a bi-directional lab in CKD EHR by Epic (for example, LabCorp and Quest), order requisitions will go electronically to the lab, where specimens are drawn, labs are collected, and results are electronically sent back the patient's chart via the In Basket for review.
  - (No paper needed)
- If you have an interface that is considered results only in CKD EHR by Epic, the order is placed in CKD EHR by Epic, once signed you would need to print the order requisition from either the Visit Orders report, Chart Review, Within the Visit under completed orders or through check out and provide to the patient; once the specimens are collected, the lab results are electronically sent back to CKD EHR via the In Basket for your review.
- If you do not have an interface, you can Create and Sign an order in CKD EHR by Epic, Print Order and provide to patient. When results are received, manually enter them in the Results Console or Enter/Edit Results activity and Scan any required documentation via Media Manager.

Orders

Using the '**Meds & Orders'** section, either type out the order you would like, or open up the different options under the drop down arrows!

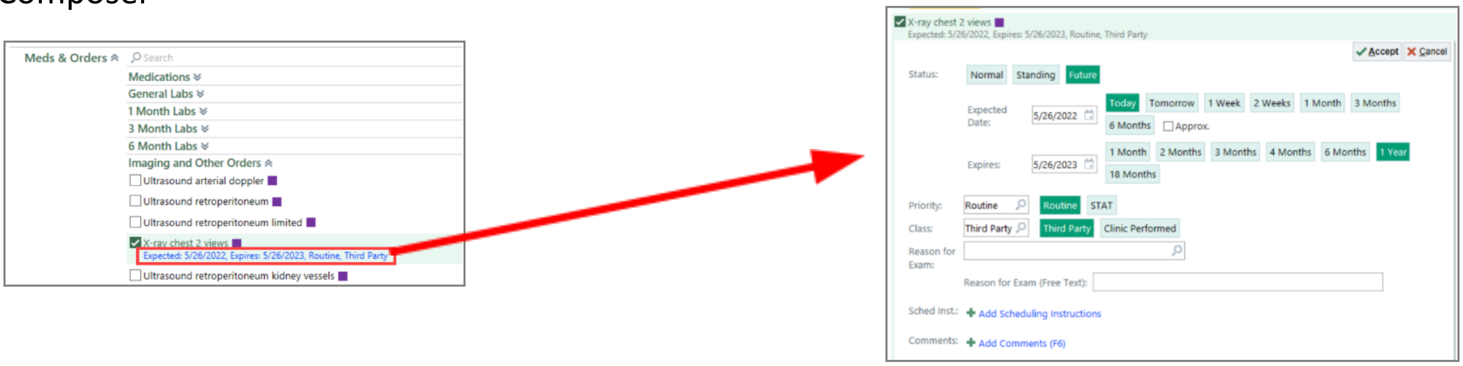


BACKPOCKET

These pre populated lists of orders are the most common orders placed within CKD EHR by Epic.

Modifying Order Details

Once you have selected an Order, clicking on the blue Hyperlink will take you to the Order Composer



Complete all the fields and select '**Accept**' when you are finished!

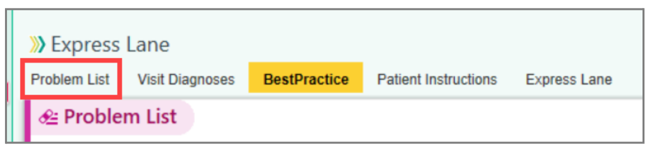
Order Privileges by User Role

Roles	Users With Clinical Privileges	Users with Non-Clinical Privileges
Practice Manager	✓ Create, pend, and route to provider new Rx orders ✓ Create and sign medication refills from pharmacy ✓ Create and sign medication reorder from pt. med list ✓ Create and sign lab orders ✓ Create and sign procedure orders	× Create new medication requests × Medication refills requests from pharmacy × Medication reorder requests from patient ✓ Create and sign lab orders ✓ Create and sign procedure orders
Front Desk	✓ Create, pend, and route to provider new Rx orders ✓ Create and sign medication refills from pharmacy ✓ Create and sign medication reorder from pt. med list ✓ Create and sign lab orders ✓ Create and sign procedure orders	× Create new medication requests × Medication refills requests from pharmacy × Medication reorder requests from patient ✓ Create and sign lab orders ✓ Create and sign procedure orders
Medical Assistant	✓ Create, pend, and route to provider new Rx orders ✓ Create and sign medication refills from pharmacy ✓ Create and sign medication reorder from pt. med list ✓ Create and sign lab orders ✓ Create and sign procedure orders	
Registered Nurse	✓ Create, pend, and route to provider new Rx orders ✓ Create and sign medication refills from pharmacy ✓ Create and sign medication reorder from pt. med list ✓ Create and sign lab orders ✓ Create and sign procedure orders	

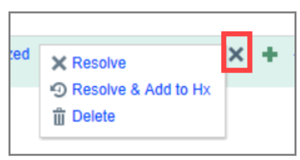
Scribe	✓ Create, pend, and route to provider new Rx orders ✓ Create and sign medication refills from pharmacy ✓ Create and sign medication reorder from pt. med list ✓ Create and sign lab orders ✓ Create and sign procedure orders	
Physician Assistant*	✓ Create, pend, and route to provider new Rx orders ✓ Create and sign medication refills from pharmacy ✓ Create and sign medication reorder from pt. med list ✓ Create and sign lab orders ✓ Create and sign procedure orders	
Nurse Practitioner*	✓ Create, pend, and route to provider new Rx orders ✓ Create and sign medication refills from pharmacy ✓ Create and sign medication reorder from pt. med list ✓ Create and sign lab orders ✓ Create and sign procedure orders	
Physician	✓ Create and sign Refills and New Rx ✓ Create and sign lab orders ✓ Create and sign procedure orders	
**Per the practice's request, only Physician Assistants and Nurse Practitioners with ePrescribing privileges can create and send new, refill, and reorder medication requests. Otherwise, NPs and PAs without ePrescribing privileges will have the same order access as MAs and RNs.*		

Exercises

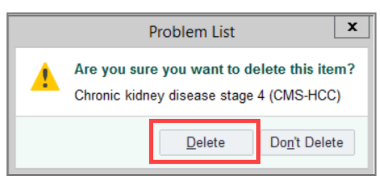
Update Problem List



- <u>Select '**Problem List'** on the section header</u>
  - Explore the problem list
- <u>Select the **Problem** Chronic Kidney Disease Stage 4</u>
  - We notice that this patient also has a DX of ESRD. In this case, we want to remove the old Stage 4 DX so that the Problem List more accurately reflects this Patient's Diagnosis and History



- <u>HOVER over the **grey X icon** and select the option you want to use</u>
  - <u>For today, let's choose '**Delete**'</u>
  - You will see an alert popup. <u>Select '**Delete**'</u>

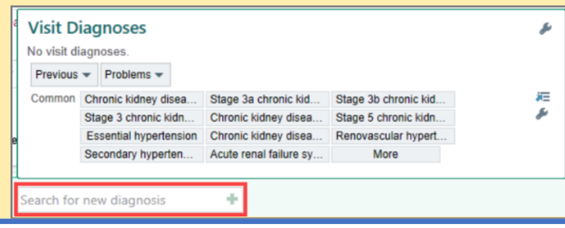


You can also add a new Diagnosis if you like. Navigating down to the bottom left side of your window, click on the '**Add DX'** Icon to open up a search box and add your new DX.

- Add a Diagnosis of your choosing

FYI/BACKPOCKET

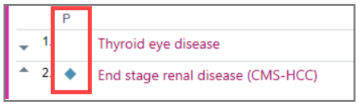
Adding a Diagnosis will automatically include it as a Visit Diagnosis



Adding the Visit Diagnosis

- <u>Go to the Visit Diagnoses section.</u>
    - Items added from the Problem List will have a green check mark

- <u>Search for **Hyperkalemia** using completion matching</u>
- <u>Practice changing which diagnosis is listed as primary for the visit</u>



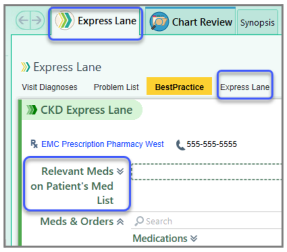
  - Select in the **P** column to change the primary diagnosis
  - This will be the first diagnosis that appears for this visit in Chart Review

Adding Patient Instructions

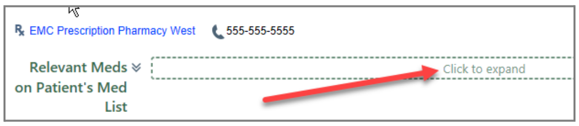
Using the Note Writer, add any Patient Instructions here

- These will appear on the Patient's '**After Visit Summary'**

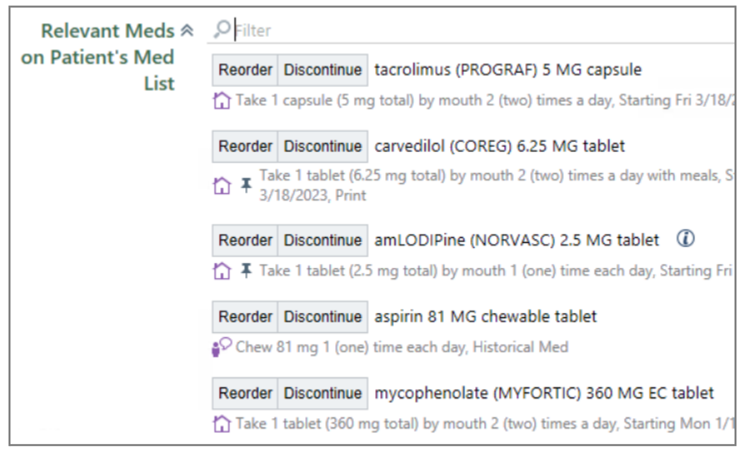
Reordering a Medication



- Go to the section '**Relevant Meds on Patient's Med List'** located in the Express Lane Navigator
- Select the "Click to expand" box to open up the Patient's med list



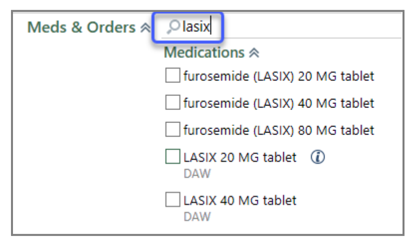
- All of Norman's current meds are listed here for quick access



Practice reordering and discontinuing a few medications

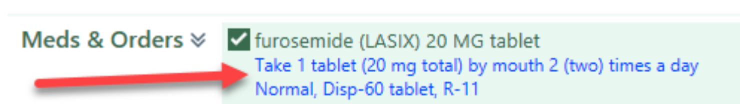
Searching for a Medication

- <u>Prescribe a new medication for Lasix 20mg tablets</u>
  - o The house appears for prescription medications
  - o A syringe icon would appear for clinic-administered medications

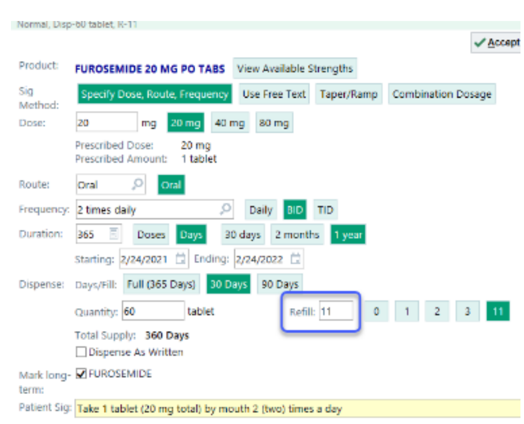


- <u>Select **Accept**</u>

Modifying Order Details for a Medication



- <u>Select on hyperlink for</u> Lasix 20 mg tablet to open Order Composer.
- <u>Practice changing details, </u>such as the number of refills
- <u>Right-click to close the Order Composer (</u>or select '**Accept**' at the top right) and accept your changes



Change the Patient’s Preferred Pharmacy

Next, let’s change the Pharmacy for this Patient!

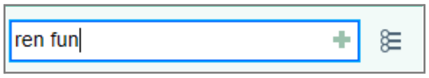
Select the blue hyperlink at the top of your CKD Express Lane Activity Tab

- Choose any Pharmacy that you would like to use for today
- Add a secondary **MAIL ORDER** Pharmacy as well
    - Use ‘**Express Scripts**’
    - Utilize the **STARS** in front of the Pharmacy name to identify the Patients preferred Pharmacy

Orders

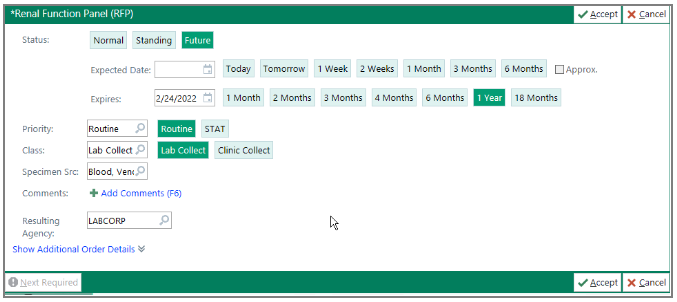
- Place a Renal Function Panel for Norman
    - Select the ‘**Add Order’** function on the Visit Task Bar at the bottom of your window

    - Type in “**ren fun**” to completion match search for a Renal Function Panel



    - Select the RFP that you want to order (Double Click), making sure it is tied to the correct Lab that you use at your site

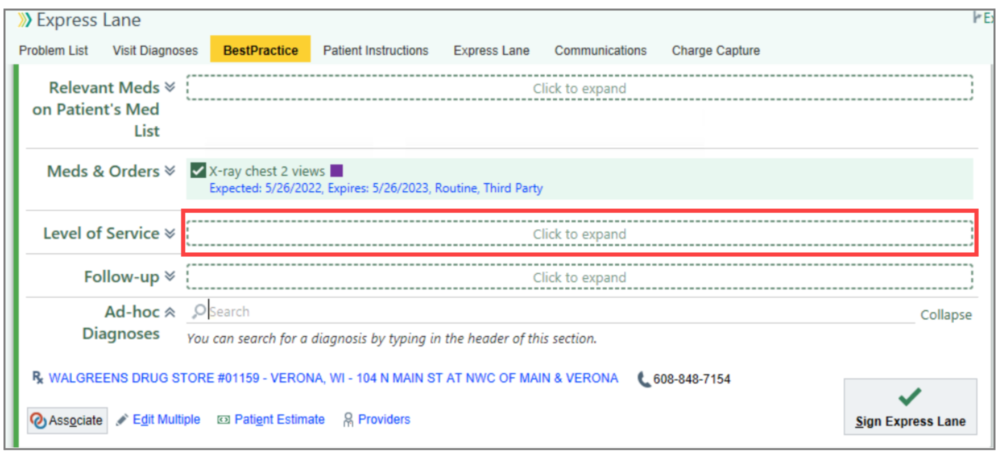
- In the Lab orders composer window that opens up after selecting the order, you can alter this order to best fit your Patient’s needs
- Practice changing details of the lab order
- Right-select (or select the ‘**Accept**’ at the top right of the window) to close the Order Composer and accept your changes



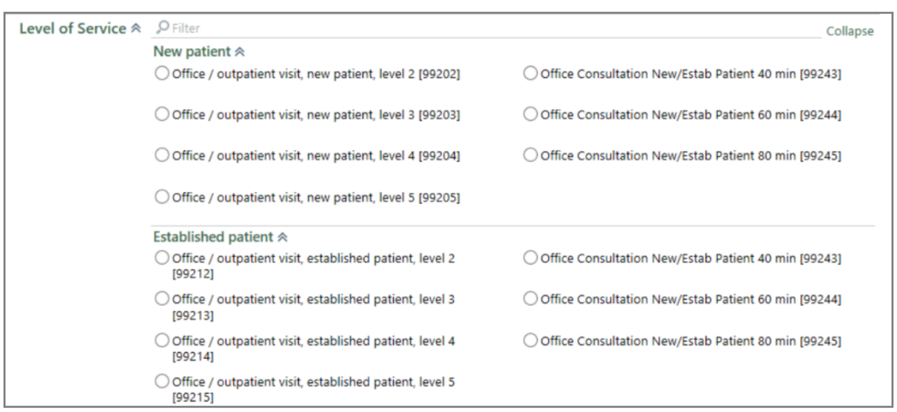
Stop here and wait for your Instructor to continue on

Document your Level of Service

Scrolling down from the ‘**Meds & Orders’** section, you will navigate to the ‘**Level of Service**’ and expand the section by clicking on the drop down arrows.



In the Pop Up window, make your selection:

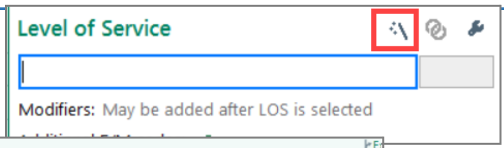


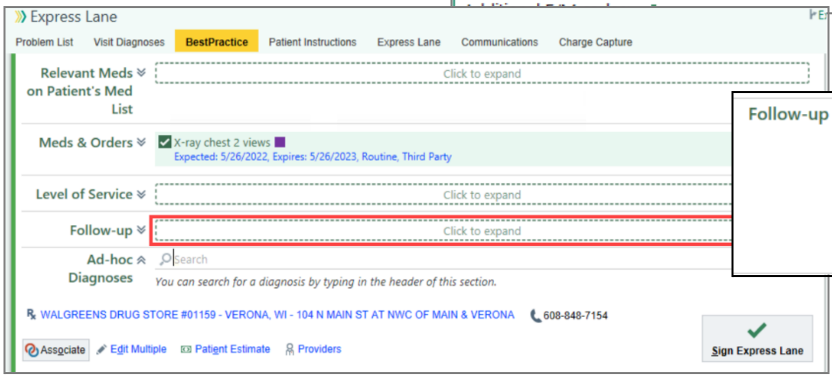
BACKPOCKET

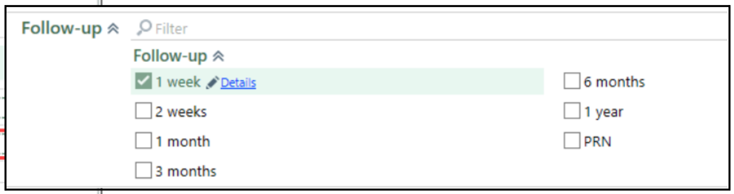
You can also document your LOS (Level of Service) down below in your Visit Task Bar. This may be a better option if you are unsure of what to choose. Utilizing the magic wand in that window will open up a more descriptive navigator!

Document a Follow Up

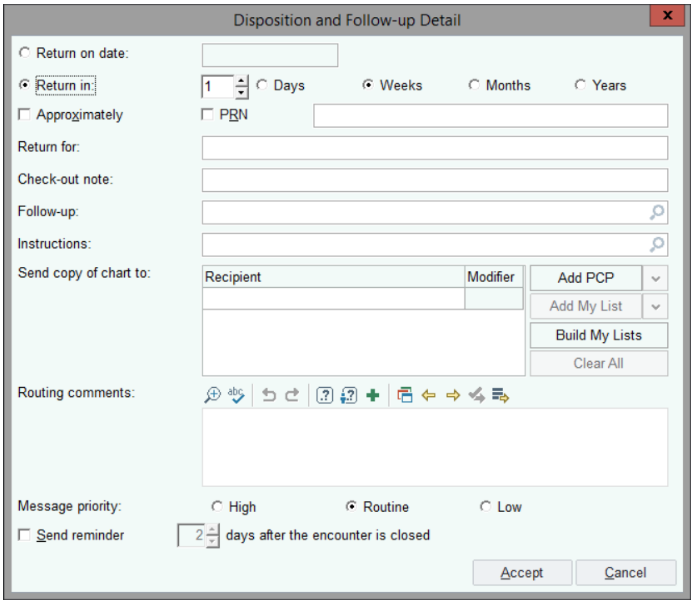
Documenting your follow up in the Express Lane is very easy. Simply select the drop down arrows to open up the 'Follow Up' section.







Selecting the time frame will allow you to click on the blue Hyperlink '**Details**' and edit the information



BACKPOCKET

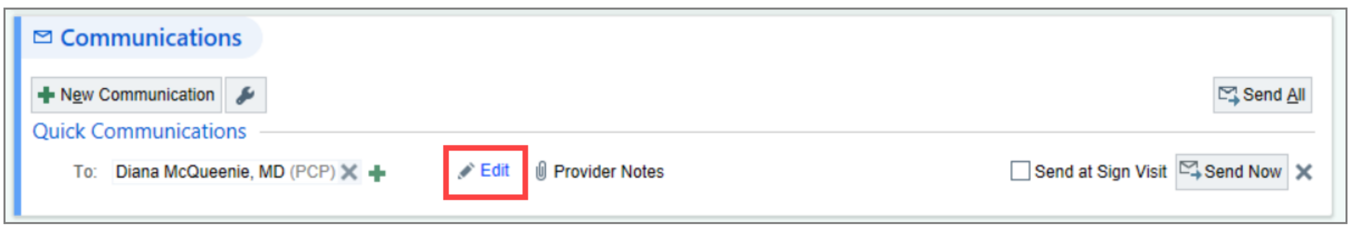
This information will be included in the Patient's After Visit Summary (AVS)

Communication

If your practice is licensed for Esker integration, a letter can be faxed to the provider upon signing your visit. If your practice is not licensed for Esker integration, the letter can be printed.

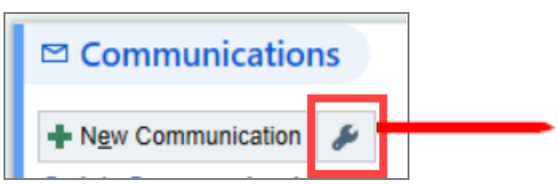
There will possibly be a '**Quick Communication'** queued up by default. This is usually defaulted to the PCP. To edit this letter. Select the 'Edit' icon to the right of the '**To:**' section

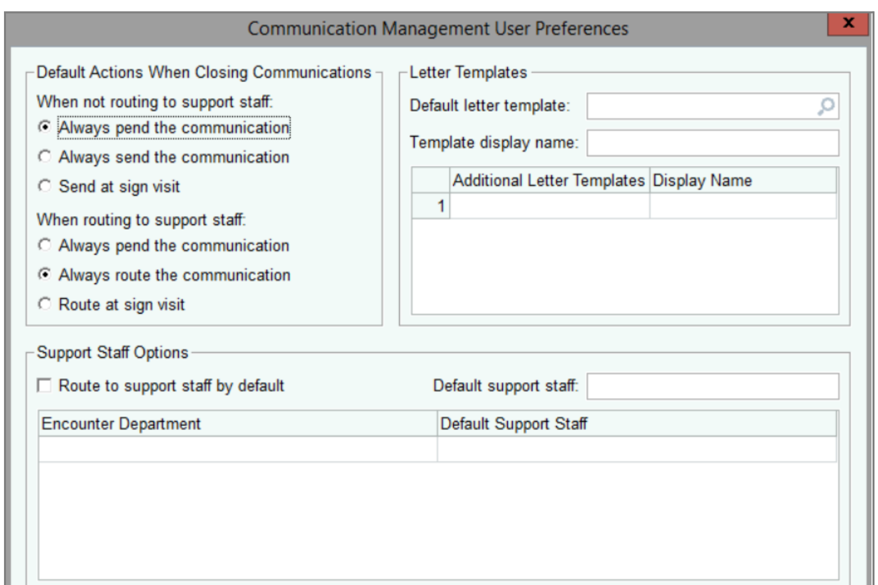
To



create a new letter, click on the '**New Communication**' button at the top left of your Communications card!

You can also click on the wrench Icon to open the Communication Management User Preferences.



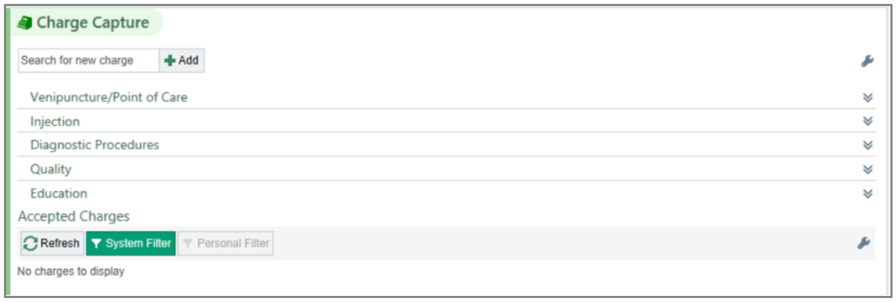


Fill out all desired preferences and select 'Accept' when you're done to save!

Charge Capture

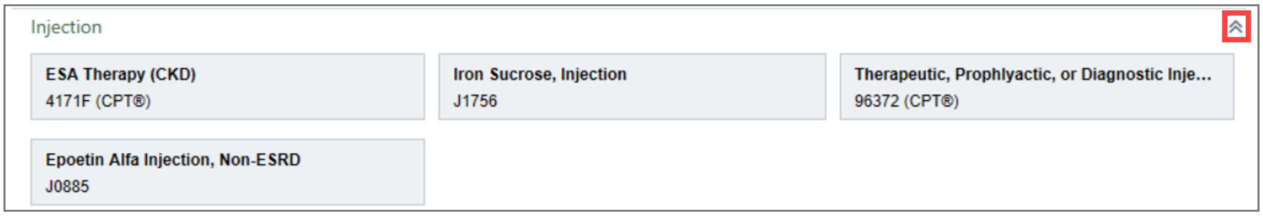
You will use Charge Capture if there are additional charges above and beyond the LOS.

Examples would be POCT tests, In Clinic Injections etc…

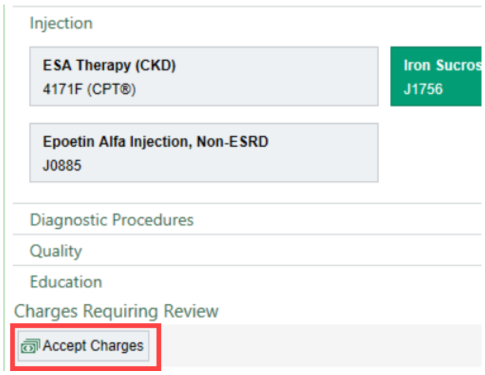


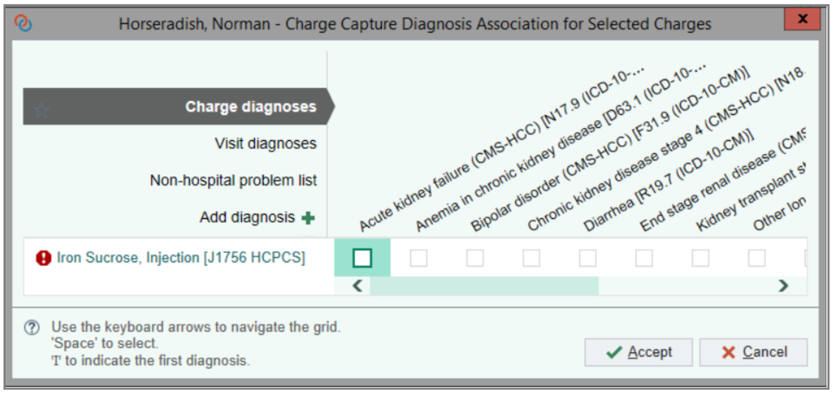
Expand the individual sections by clicking on the upside down arrows (chevrons) after the charge you want to include.

For instance, you can open up the chevrons after '**Injection**' to see your options. You then select the option that you need and it will be added to the visit charges!



If you select the '**Accept Charges'** button at the bottom left of the Charge Capture card, you will have the opportunity to associate Diagnosis for this charge right here in the window instead of doing it later when you go to sign the visit!





Completing Your Progress Note

To recap, at this point you have placed some orders, documented a follow-up plan, selected a Level of Service, and completed the Subjective and Objective portions of your note.

Now you need to finish your ' **Assessment & Plan'** and '**Sign the Visit'.**

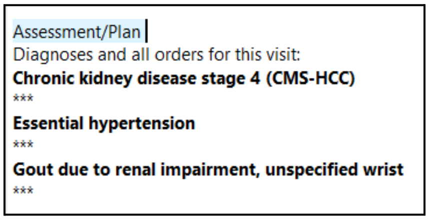
4. Navigate back to your Note in the Sidebar. You can click the '**Edit'** button if the note has closed.
5. Scroll down to the **Assessment/Plan** section

- If you have taken actions since you last edited your note, you will want to '**Refresh'** your note to make sure it is up to date. It is a good habit to always click the '**Refresh'** button before finalizing any note.

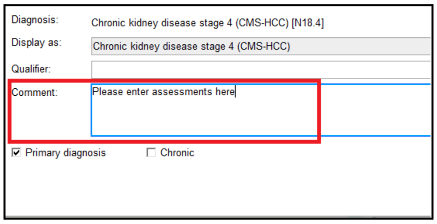
6. Click the '**Refresh'** icon on the note toolbar

- In order to give clinicians the ability to choose an option that best suits their workflow, we have updated all four note templates to include an assessment and plan SmartList with both the refreshable A&P and the non-refreshable A&P.

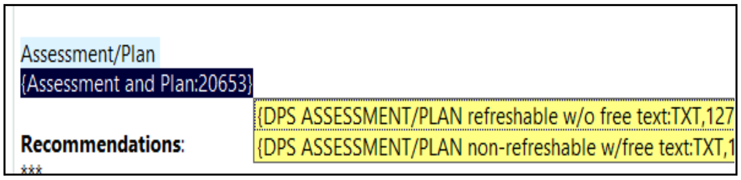
- **Non-refreshable**



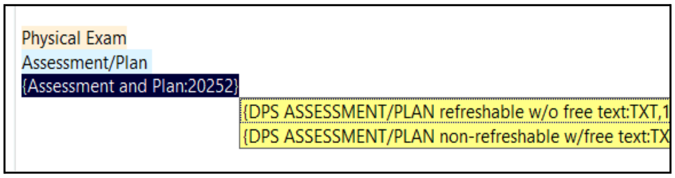
Refreshable



Basic/Detailed Templates



New/Follow Up Templates



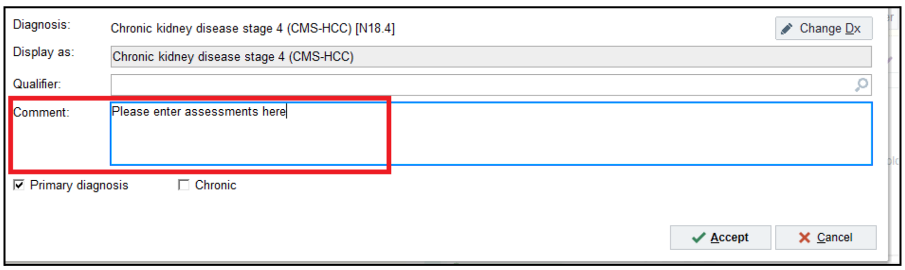
FYI- IMPORTANT

This is a multi-pick list where you may select the appropriate option.

Left click to pick the option and **right click** to insert into your note.

Keep in mind that since the refreshable link does NOT include wildcards, any Visit Diagnosis assessments must be made in the diagnosis '**Comments'** section:

- Navigate to Visit Diagnosis> Select the name of the diagnosis that you would like to access> document your findings in the comment field> Select Accept.



You may document your A&P under the Current Assessment and Plan field on the DX of the problem within the problem list and once added to the Visit DX the notes will carry forward.

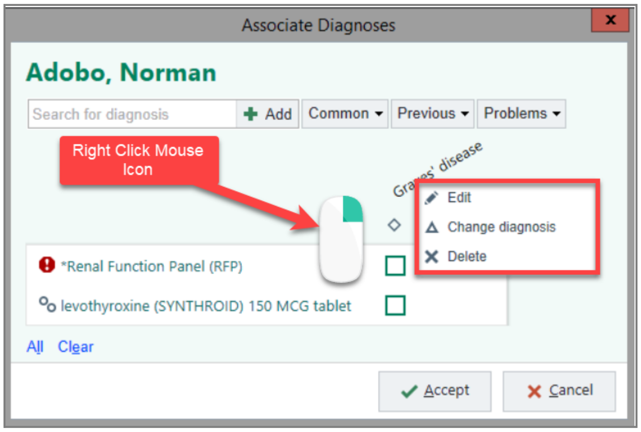
Pressing **F2** will find anything remaining in my note that still needs to be documented

- If the patient qualifies for any Quality Measures that require a follow-up plan to be documented, you can use that wild card(s) to add free text or pull in a SmartPhrase
    - Click Refresh
    - Accept

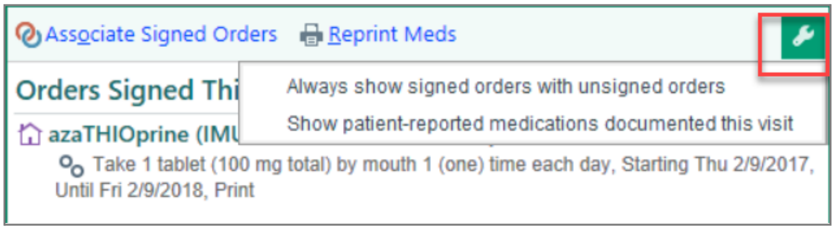
Signing the Express Lane

In order for the medications and orders that you selected above to be routed to the pharmacy and the appropriate locations,you need to '**Sign Express Lane'.**

- Signing the express lane **does not sign the visit!** It only signs off on the items that have been included/ordered and documented in the center column (Express Lane)
- Click the '**Sign Express Lane'** button
- All orders need to be associated with a diagnosis. Once you select '**Sign Express Lane'** you get a pop-up to associate a DX to pending orders
- You can also select the DX, Edit the DX, Change the DX or Delete the DX directly from the '**Associate Diagnosis'** pop Up window!



- Once signed, click the wrench icon in the '**Signed Orders'** window (clipboard) of the visit taskbar to see more options



Signing the Visit

When you're ready to close the visit and send it to billing, select the '**Sign Visit'** button in the Visit Taskbar (lower right corner).

It's important to remember:

- Charges are **not** sent to billing until the Visit is Signed
- Once the encounter is closed, the patient can see information like the reason for visit, vitals, med list, follow-up instructions, patient instructions, and upcoming appointments in their MyChart portal

- Click **Sign Visit** in the bottom taskbar

- If there's missing documentation, you will see a red icon to click on:
  - o Click the red banner to jump to the area(s) of the chart that need attention
  - o Click needed actions (print/send communication at close of encounter)
- When all documentation is complete, you can select the '**Sign Visit'** button
  - o Notice you are brought back to Schedule and the status for Norman has changed!

BACKPOCKET

If the encounter isn't submitted for billing within 24 hours, you'll get a '**My Open Charts'** message in your '**In Basket'** reminding you to close the visit

Exercises

Now, let's practice what we just learned!

Document a LOS

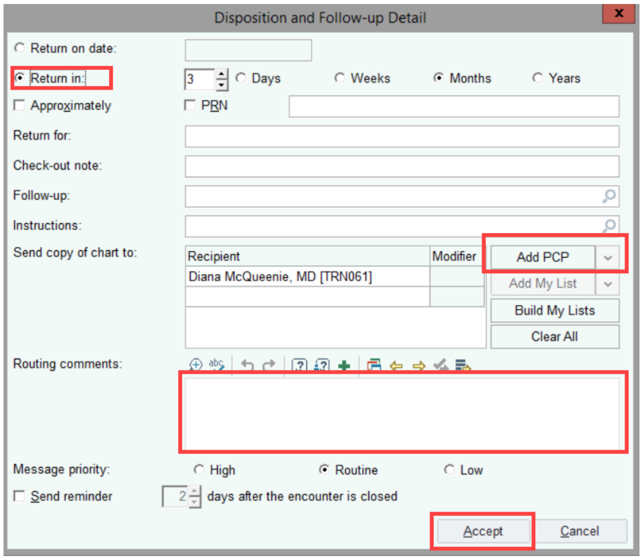
- At the bottom of your screen on the right, you will see the '**Level of Service'** button. We will be documenting a LOS here

- <u>In this window, document an EST3 visit code</u>
    - o You can also change/Add Modifiers as well as E/M codes

Documenting Follow Up

- <u>Go to the '**Follow-up'** section and select a time frame</u>, such as 3 months. Select the '**Details**' blue hyperlink that appears to edit the details of this Follow Up

    - o The Follow-Up will appears on the patient's after visit summary (AVS) and MyChart
    - o <u>Route to PCP</u>
    - o <u>Enter comments</u> using free text, or pull in a SmartPhrase or SmartText



Documenting Communication

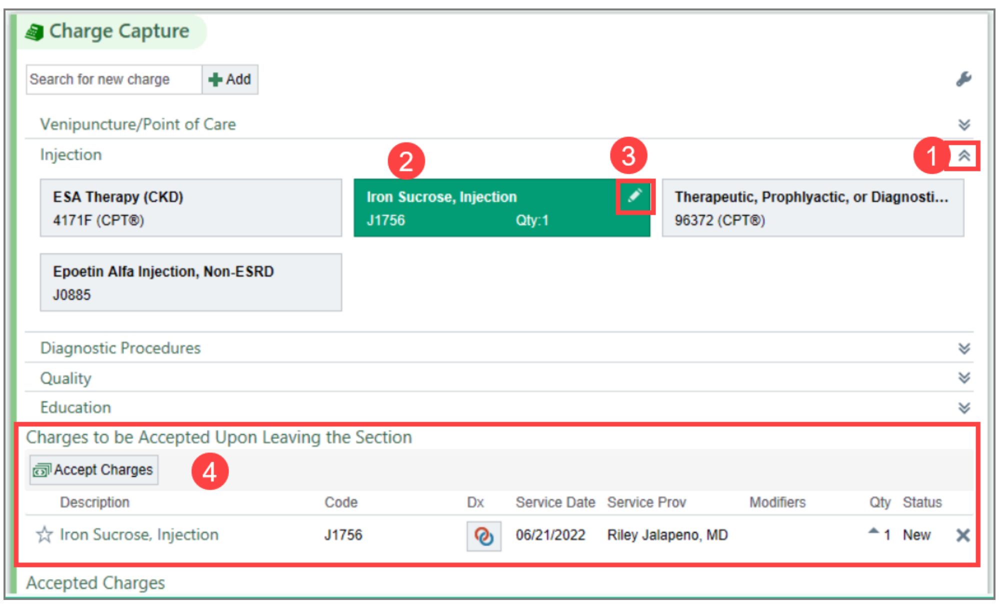
For visits with a referring provider, the system automatically queues up your visit note to be sent to the Referring Provider.

- If your practice **is licensed** for Esker integration, this letter will need to be faxed to the provider when you sign your visit
- If your practice is **not licensed** for Esker integration, the letter will print
  - Quick Communication to **Diana Mcqueenie** is already queued up
  - Select the '**Edit'** button and edit the communication

Documenting Charge Capture

If you need to add a billable charge outside of the level of Service (such as in-clinic medication administration) you would add that charge in the Charge Capture section

<u>Go ahead and document an Iron Sucrose Injection</u>



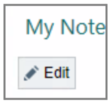
1. Expand the Elipsys
2. Select the charge that you want to add
3. Select the '**Edit**' icon to edit the details
4. Confirm the correct charges are documented

Completing your Progress Note

At this point you have placed orders, documented a follow-up plan, selected a LOS and Charge Capture.

Now you need to finish your Progress Note and then '**Sign the Visit'**

- Navigate back to the note you started earlier in class and select the '**Edit'** button (Remember, your note lives at the far right in the Sidebar!)



- Scroll down to the **Assessment/Plan** section
- Since you have taken action since you last edited your note, select **Refresh** on the note toolbar to make sure your note is up to date
    - It is a good habit to always select the **Refresh** button before finalizing your note

- Pressing **F2** will find anything in my note that still needs to be resolved
- Finalize your note using F2, filling out any Wildcards, and free texting any additional relevant info for the patient
- Select '**Accept'** when completed

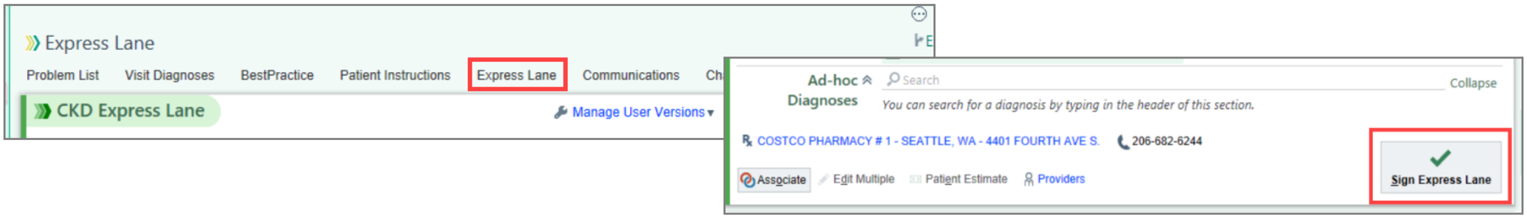
Signing the Express Lane

You are ready to close the visit and send it to billing, which we do with the '**Sign Visit'** button located on the bottom right side of your window

- It's important to remember:
    - Once an encounter is closed, the patient can see information like the reason for visit, vitals, med list, follow-up instructions, patient instructions, and upcoming appointments in their MyChart portal (if activated)

- Charges are not sent to billing until the visit is signed

- <u>Select **Sign Express Lane** at the end of the Express Lane tab</u>



- If the encounter isn't closed you'll get a '**My Open Charts'** message in your In Basket in 24 hours, reminding you to close the visit
- If you need to change something after you've closed an encounter, you can:
  - Create an addendum by opening the encounter again from your schedule or from Chart Review

Signing the Visit

You are now ready to close the visit and send it to billing!

We will do this with the '**Sign Visit'** button located on the bottom right side of your window

- It's important to remember:
  - Once an encounter is closed, the patient can see information like the reason for visit, vitals, med list, follow-up instructions, patient instructions, and upcoming appointments in their MyChart portal (if activated)
  - Charges are not sent to billing until the visit is signed
- <u>Select **Sign Visit** in the bottom taskbar.</u>
  - If the encounter isn't closed you'll get a My Open Charts message in your In Basket in 24 hours, reminding you to close the visit
- If you need to change something after you've closed an encounter, you can:
  - Create an addendum by opening the encounter again from your schedule or from Chart Review

Stop here and wait for the Instructor to continue

Documenting a Visit with the Plan and Wrap Up Activities

All Users have the option to utilize the '**Plan**' and '**Wrap Up'** Activities for visit documentation instead of the '**Express Lane**' should they so choose.

Next we will discuss how to use the Plan and Wrap Up Activities to complete your visit documentation!

HYPERLINK

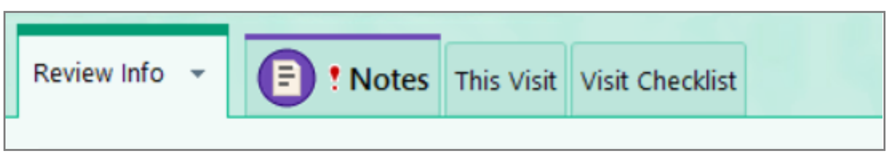
The '**Express Lane**' is a more streamlined way to document a visit and takes less time to complete.

To document a visit using the Express Lane, click this link to be taken to that section of this Manual.

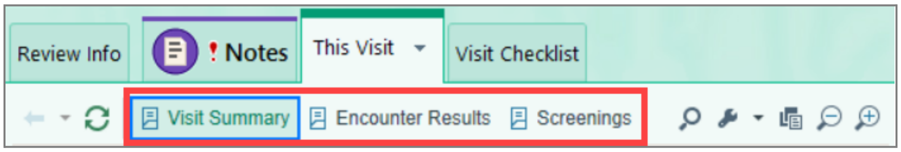
Reviewing Patient Data after Rooming

'Review Info' sidebar: this is where a provider can see a Patients allergies, medications, problem list, and history at a glance. This information was pulled from the Patients chart as well as the information provided by the Nurse or MA when rooming this patient.

- Scrolling down the sidebar youwill see the '**Mark All as Reviewed'** button at the bottom. Marking as Reviewed helps support your MIPS. When you click Mark as Reviewed, you overwrite the Nurse's timestamp with your own.
- Other Tabs in the Sidebar are helpful to look at as well



  - **<u>Notes</u>**- This is the sidebar Tab that allows for note taking while exploring the Patients chart. No matter where you go within the chart, the Notes tab is always right there and able to be documented in without going to another screen or window
  - **<u>This Visit</u>**- This tab shows you the **Visit Summary, Encounter Results** and any **Screenings** that have been completed. This is especially useful for VBC and CHE visits.



- **<u>Visit Checklist</u>**- This tab contains the Meaningful Use Checklist and Quality Measures. Ties directly to MIPS data.

When your nurse/MA rooms a Patient, they will document the following types of information on the Rooming tab:

Reason for Visit	Family History
Vitals	Tobacco and Drug Use
Allergies	Preferred Lab (Resulting Agency)
Current Medications	Manual External Results Entry
Past Medical History	My Chart Sign Up
Surgical History	

You can update or document information in the rooming tab as well if needed

Trend Synopsis Data

A powerful way to see how a Patients labs and medications trend over time and respond to treatment, is with a tool called Synopsis.

- Synopsis graphs results against other items like vitals, medications or procedures.
- Used to display trending data (e.g. lab results, medications, vitals etc.) and the data can be easily incorporated in a patients encounter.
- We have added roughly 1,000 result components to Synopsis, updated the '**Default**' view and prioritizing the lab results that are most important to you!
    - There are various Synopsis views to choose from located across the top of the activity.
        - Upon selecting a tab, the initial panel will be displayed and the remainder of panels will be collapsed. You may expand as needed.
        - You can change the order via the filter using the wrench.
        - Patient Spotlight + allows users to select additional labs for view on their patient

BACKPOCKET

Select the **+** green icon for **Patient Spotlight** to add additional data that you want to be pulled into your note! **ONLY** data that is added to the Patient Spotlight will be pulled automatically into your note. However, by right clicking on the graph, you can chose to **COPY** or **PRINT** the data.

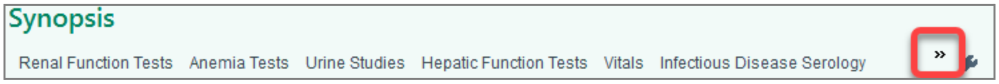
By choosing **COPY**, you can then paste that data into your note manually

- You can trend Medications with Labs

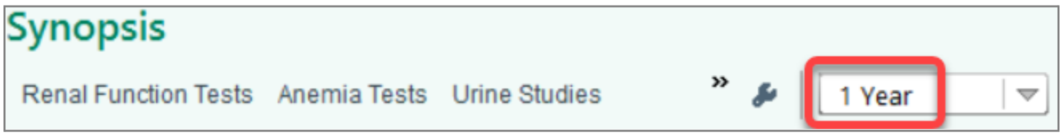
- You can select check boxes to graph several lab results, medication and/or vitals **(Up to 4 values)**
- **More Icon-** Offers more options for data review

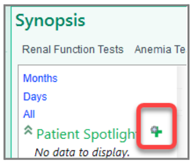
For example, let's look at Renal Function Panel Results

- Navigate to the **'MORE'** arrow to see other options you can choose

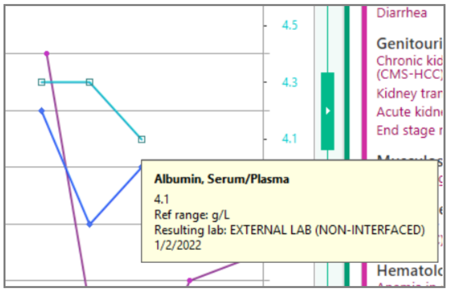


  - For this example, let's choose to highlight the '**Renal Function Panel'** at the top of your '**Synopsis**' window
  - Adjust time Frame back to 1 year, if not the default





  - Select the +green icon for Patient Spotlight to add specific LABS that you want to be pulled into your note
  - Click to select the **Patient Spotlight** labs that you would like to see on the graph to the right



  - Hover over points in the graph to see results
  - Navigate to the Renal Function Tests section/tab and select a couple of labs under the renal function panel.
  - Pin them to show how they display in the **Patient Spotlight**

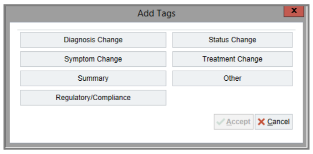
BACKPOCKET

Right click on graph to show Copy and Print options. If you choose to copy, you will copy in discrete data points and can paste them into something like your Note.

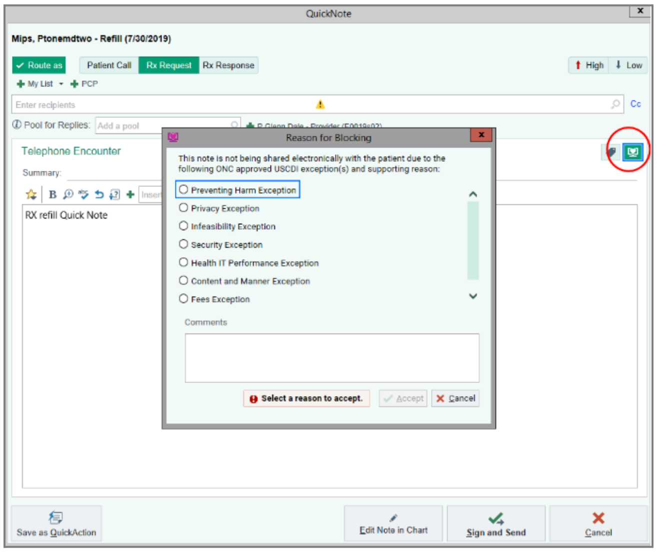
Starting Your Note

Looking at the top of this note, we can see that there are several icons that can be used:

- **Sensitive**- Marking a Note as **Sensitive** will ensure that this note will NOT be visible to other providers or staff that are NOT on the Patients Care Team. It will, however, be shared with the Patient through My Chart!
- **Tag**- You will also see an icon with a tag. This option allows you "**tag**" information as it occurs for reference later. Example- when a DX changed from CKD 3 to 4

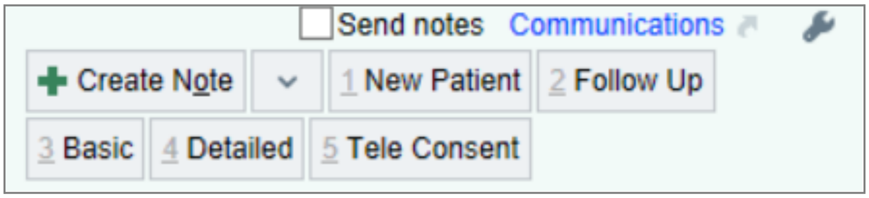


- **Share w/Patient-** There is a "**Share w/ Patient**" button at the top of the Note Editor that is selected by default. All notes will be automatically sent to any Patients that have My Chart after the visit.
  - o Should you decide to NOT share this note, you will need to click the '**Share w/ Patient'** icon to de-select this rule. You will then be prompted to list a reason why you have chosen to not share this note.

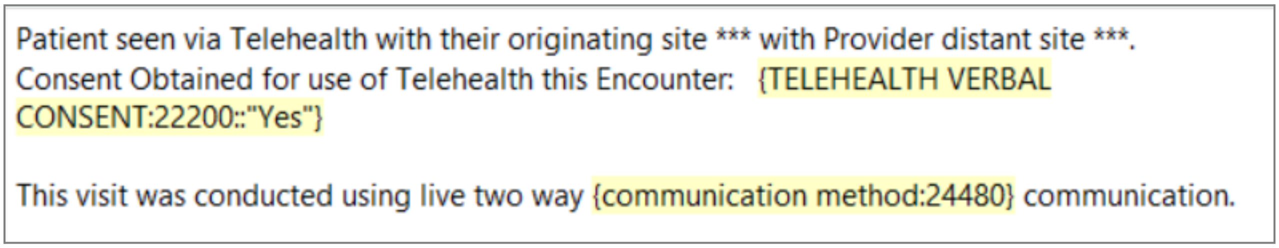


Depending on your practice workflows, your Nurse/MA may have started your note for you with the Template that your practice uses, or that you have created for your own notes.

There are 5 created templates that you can use in their entirety, or as a base for your own templates.



6. **New patient**- Subjective, ROS, Objective, PE, A/P
7. **Follow Up**- Subjective, ROS, Objective, PE, A/P
8. **Basic**- PCP, History of Present Illness, ROS, PE, Medications, Labs/Imaging (with Synopsis data), A/P, Recommendations, Future Appointments
9. **Detailed**- PCP, History of Present Illness, Past Medial History, Past Surgical History, Social and Family History, Medications, Allergies, ROS, PE, Labs/Imaging (with Synopsis Data), A/P, Recommendations, Future Appointments
10. **Tele Consent**- Verbiage specific for a Telehealth Visit

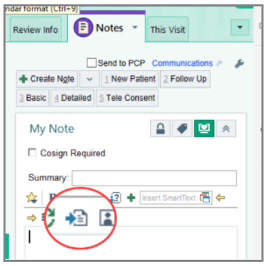

Patient seen via Telehealth with their originating site *** with Provider distant site ***.
Consent Obtained for use of Telehealth this Encounter: {TELEHEALTH VERBAL CONSENT:22200::"Yes"}

This visit was conducted using live two way {communication method:24480} communication.

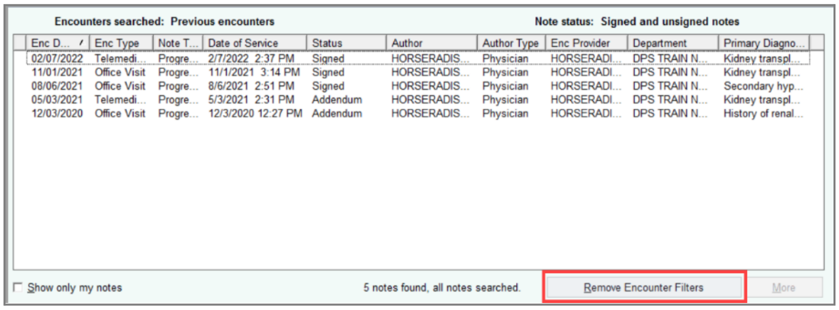
Copying a Previous Note into your current note

Copy previous functionality should only be used when the included wording accurately reflects and represents the care and observations from that specific patient visit.

Copy previous should not be inserted to any patient record without careful review. All copied from previous text must be thoroughly evaluated for appropriateness to the specific encounter.



1. Within an Open Note, place your cursor where you want to add some text or all of the text from a previously written note and select the '**Copy Previous Note'** icon from the Notes toolbar
2. In the Copy Note window, select the '**Remove Encounter Filters'** button and the **'More'** button (If needed) to see a full list of Notes written on the patient


Encounters searched: Previous encounters
Note status: Signed and unsigned notes

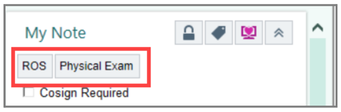
Enc D...	Enc Type	Note T...	Date of Service	Status	Author	Author Type	Enc Provider	Department	Primary Diagno...
02/07/2022	Telemedi...	Progre...	2/7/2022 2:37 PM	Signed	HORSERADIS...	Physician	HORSERADI...	DPS TRAIN N...	Kidney transpl...
11/01/2021	Office Visit	Progre...	11/1/2021 3:14 PM	Signed	HORSERADIS...	Physician	HORSERADI...	DPS TRAIN N...	Kidney transpl...
08/06/2021	Office Visit	Progre...	8/6/2021 2:51 PM	Signed	HORSERADIS...	Physician	HORSERADI...	DPS TRAIN N...	Secondary hyp...
05/03/2021	Telemedi...	Progre...	5/3/2021 2:31 PM	Addendum	HORSERADIS...	Physician	HORSERADI...	DPS TRAIN N...	Kidney transpl...
12/03/2020	Office Visit	Progre...	12/3/2020 12:27 PM	Addendum	HORSERADIS...	Physician	HORSERADI...	DPS TRAIN N...	History of renal...

Show only my notes
5 notes found, all notes searched.
Remove Encounter Filters
More

3. Highlight the note you would like to copy from. You will see a preview at the bottom of this window of the notes contents
   - To add the **ENTIRE** note text, simply click once to highlight the note you want to copy and then select **'Accept'**

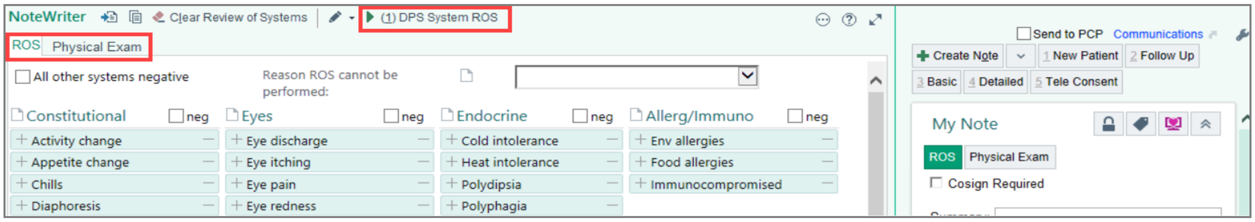
   - To add **PARTS** of the note text, highlight the desired text parts and then select the **'Add Text Only'** button

Documenting Review of Systems and Physical Exam with Note Writer



Once the note template has been selected, you will see the '**ROS**' and '**PE**' speed buttons at the top of the note editor

Selecting one of these buttons will open up the appropriate screen to the left



You will see that there are 2 tabs up above on the left. This allows you to click the tab of the exam that you are working on and then moving to the second exam without leaving this screen

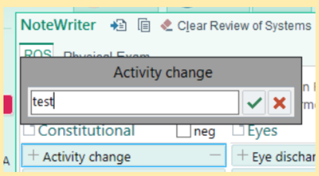
You will also see that the chosen template is displayed at the top. To edit this template, you can select the pen icon to the left and make appropriate changes as needed

As you go through the exam, clicking on the + and – for each symptom will mark that as either a positive or a negative symptom

Your note to the right will reflect your entries in live time as you complete the different data fields

FYI- IMPORTANT

You can add comments about a symptom by **hovering over the symptom and typing.** As you type, a new, small box appears that captures your entry. Click the green check mark to complete the comments.



HYPERLINK

Learn how to [customize your own ROS and PE macro] in the Personalization section of this manual! Or, click on the underlined text to be taken there within this document

Updating the Problem List

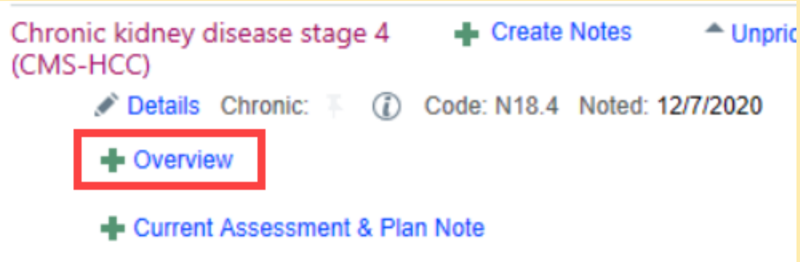
The Problem List is a tool to help easily identify and manage patients presenting medical problems at any point in the care continuum.

All physicians, PAs and NPs, including specialists are responsible for updating on behalf of the patient.

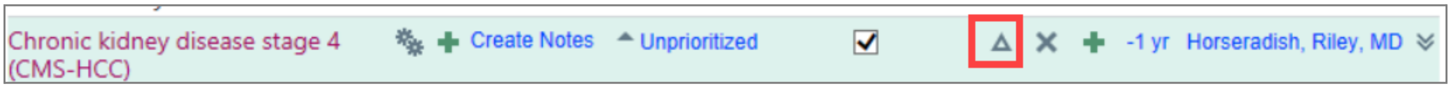
Any diagnoses and conditions that a patient is actively/currently experiencing (or potential future) or may require repeated visits go on the Problem List. Whereas, problems that the patient has experienced in the past should be updated on the Medical History (Past Medical or Past Surgical History) list.

BACKPOCKET

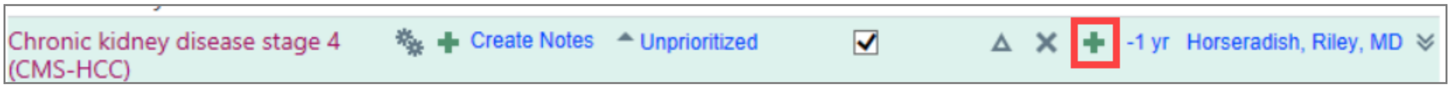
The '**Overview**' button is used to note patient specific goals (i.e. GFR/60) and will be available across visits until it is updated. This note gives you the ability to document things like the history and progression of the problem



You can also Make a Diagnosis more specific, change the Diagnosis or delete a Diagnosis on the Problem List by selecting the triangle to the right of the Diagnosis.



You have the option to add the Diagnosis to the '**Visit Diagnosis'** by selecting the green plus sign.



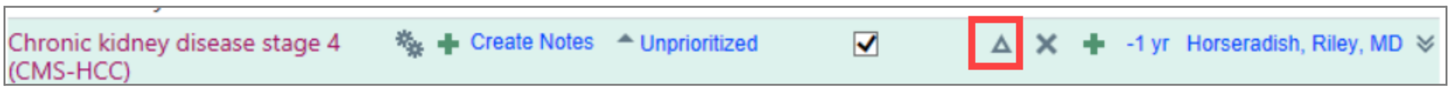
Adding the Visit Diagnosis

The Problem List is a tool to help easily identify and manage patients presenting medical problems at any point in the care continuum.

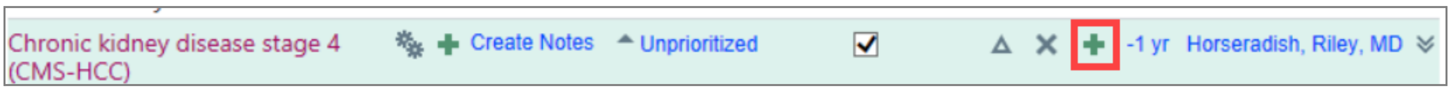
All physicians, PAs and NPs, including specialists are responsible for updating on behalf of the patient.

Any diagnoses and conditions that a patient is actively/currently experiencing (or potential future) or may require repeated visits go on the Problem List. Whereas, problems that the patient has experienced in the past should be updated on the Medical History (Past Medical or Past Surgical History) list.

You can also Make a Diagnosis more specific, change the Diagnosis or delete a Diagnosis on the Problem List by selecting the triangle to the right of the Diagnosis.

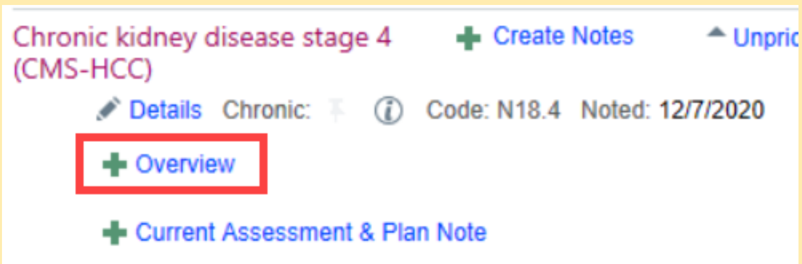


You have the option to add the Diagnosis to the '**Visit Diagnosis'** by selecting the green plus sign.



BACKPOCKET

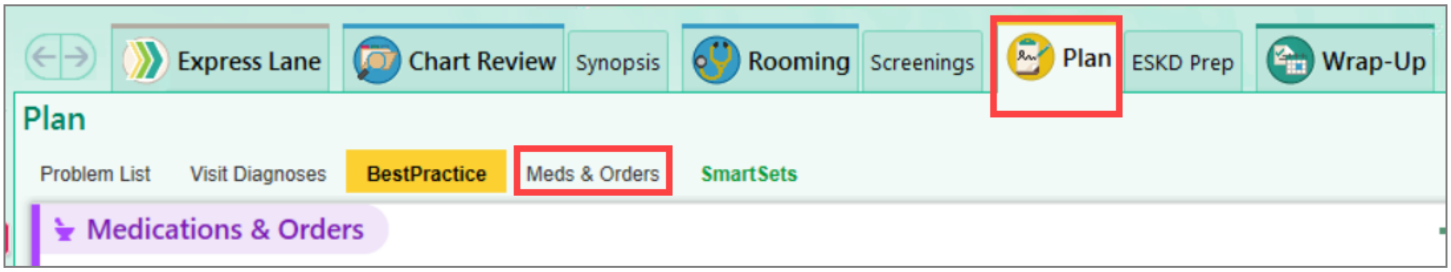
The '**Overview**' button is used to note patient specific goals (i.e. GFR/60) and will be available across visits until it is updated. This note gives you the ability to document things like the history and progression of the problem



Medication Review

The Medication Review is normally performed during the Rooming process. However, a Provider will still need to review this information with the Patient.

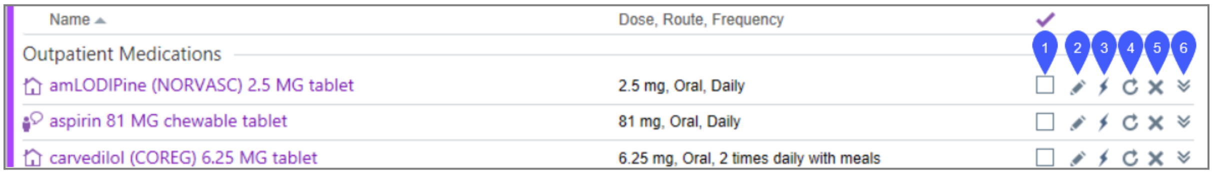
To access the Medication Review functions, navigate to the '**Plan**' Activity tab and select the '**Meds & Orders'** section



Medications & Orders

In the '**Meds & Orders'** section, you can make decisions regarding the Patients medications on file.

From here you can reorder, discontinue or adjust **CURRENT** medications as needed

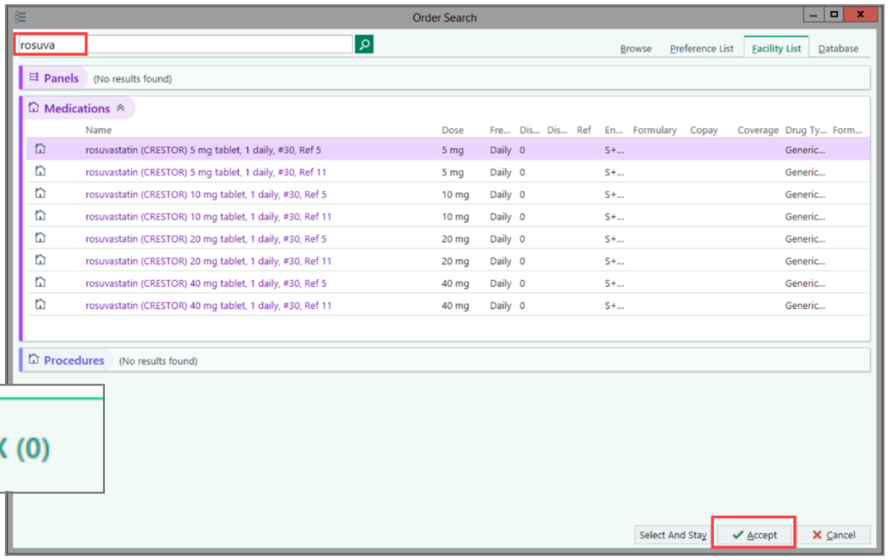


1. **Taking**- Patient is currently taking this medication as ordered
2. **Change**- Allows you to edit this prescription **AND** automatically drops into your shopping cart
3. **Adjust Sig**- Allows you to edit this prescription only
4. **Reorder**- Orders a refill of this medication
5. **Discontinue**- Will remove this medication from the Patients chart
6. **Expand**- Opens to show more information

Adding/Searching for Medication

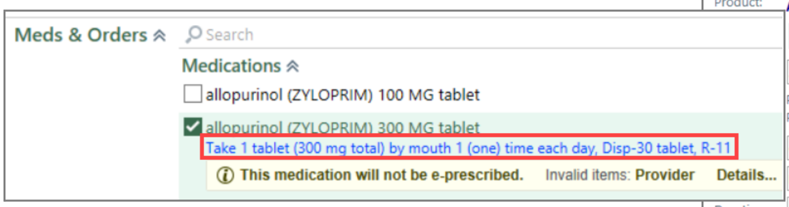
To add a new Medication to the Patients chart, you will navigate to the Visit Taskbar at the bottom left of your screen and click in the '**Add Order**' box

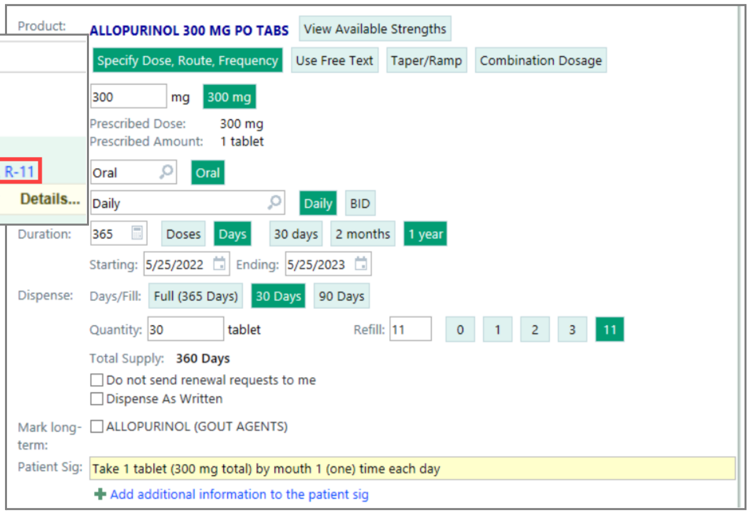
Type in the name of the Medication you are ordering and select the correct choice in the '**Order Search**' window. Select '**Accept**' when finished.



Modifying Medication Prescriptions

To Modify any prescription, simply click on the blue Hyperlink to open the order editor.





In cases where the value in the '**Administer Dose**' or '**Administer Amount**' field is redundant with the dose itself, such as for inhalers dosed in puffs, the Order Composer no longer shows those fields.

- In cases where a dose is weight- or BSA-based, the weight and BSA information appears on the weight buttons

Notice the '**Patient Sig Add additional information**' Hyperlink? This allows for a free text addition!

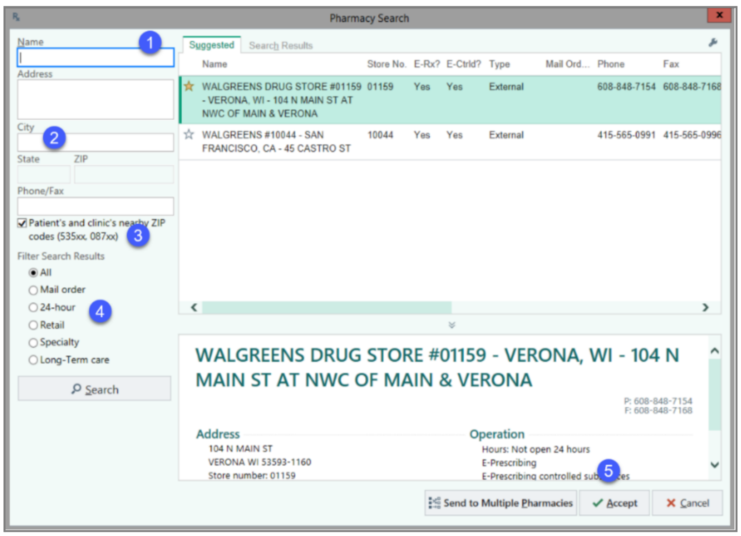
The free text is helpful when writing a prescription that can't be captured with discrete button options, like a taper, loading dose or ointment amount (i.e. use a ‘dime sized amount of ointment’). Zoloft is used with Taper/Ramp, for example.

Patient Preferred Pharmacy

Before any medications can be sent out, you must confirm the Patients Preferred Pharmacy

At the top of your window, you will see blue hyperlink with the Patients Preferred Pharmacy Verify that this pharmacy is still the preferred choice!

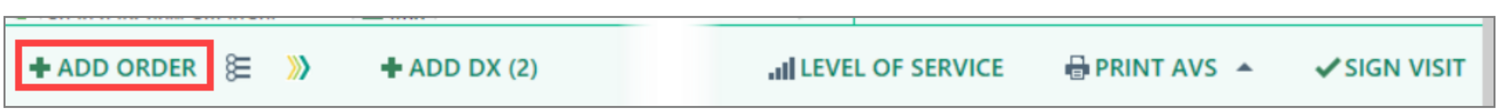
If this space is blank, or the Patient wants to use a different pharmacy, you would still click the blue link to go to the search window

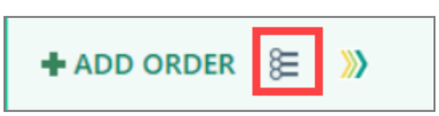


1. **Pharmacy Name-** Enter the Pharmacy name here
2. **Location City**- This helps to narrow down the search
3. **DESELECT this!**- This will significantly reduce your options for a pharmacy if left selected
4. **Specify Pharmacy type-** Useful for searching for mail order pharmacies
5. **Accept-** Will take your choice and add to the Patients chart

Orders

Use your ‘**Add order**’ button down below on the left to add a new order **OR** Use the Preference List!



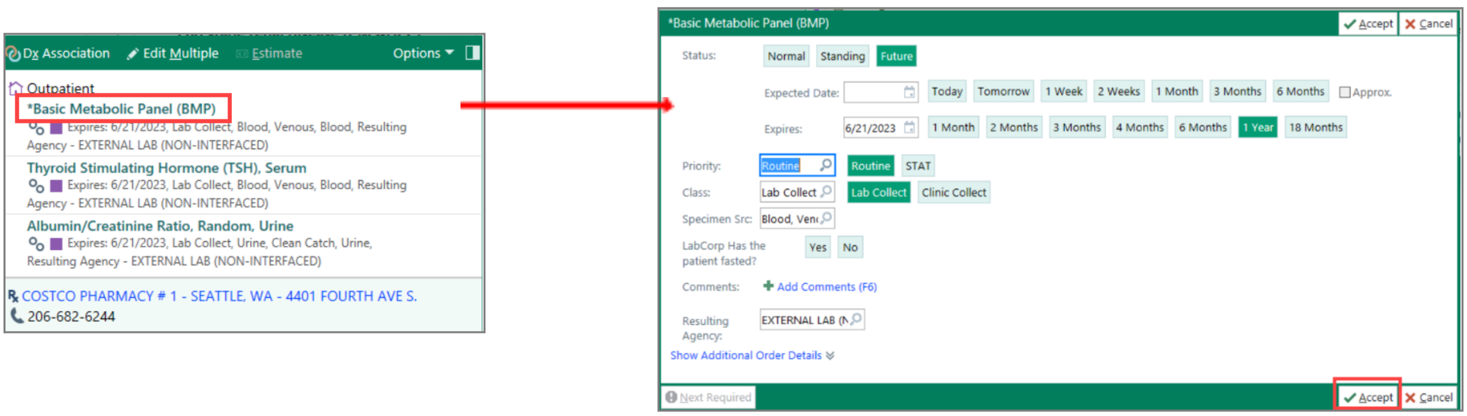


BACKPOCKET

The Preference List has pre populated lists of orders are the most common orders placed within CKD EHR by Epic

Modifying Order Details

Once you have selected an Order, clicking on the order in your Shopping Cart will take you to the Order Composer



Complete all the fields and select '**Accept**' when you are finished

- **Normal** = **One order**, being performed and resulted **in this visit**, typically only for point of care tests or clinically administered medications.
- **Future** = **One order**, in the future, **any time after this visit**, including later today
- **Standing** = **Multiple orders**, **in the future**, but the first order could be released and performed today

Unless the specimen will be collected in the clinic, the class should always be **Lab**

- For reference labs, **such as LabCorp or Quest**, the '**Resulting Agency'** field determines which interface the lab order goes out to.

Let’s talk a bit more about your patients Resulting Agency - When ordering labs that have only one available resulting agency, the order will default with that resulting agency and users will not be required to make a selection (Saves on clicks).

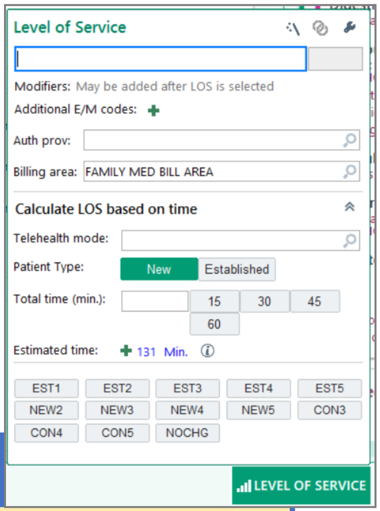
- If an order has multiple resulting agency options you will be presented with a list of options to choose from.
    - CBC with one resulting agency (ex. External lab) automatically defaults on the order and within the order composer.

Document your Level of Service

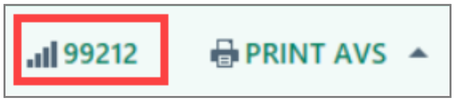
To document your Level of Service, you will navigate down to the bottom of your window and find the ‘**Level of Service’** button on your Visit Taskbar.

Selecting this button will open up a new window.

This is where you enter your level of service and any other pertinent information

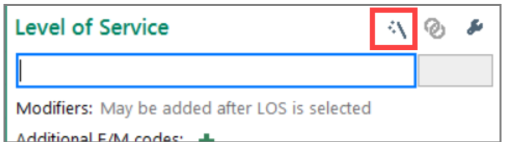


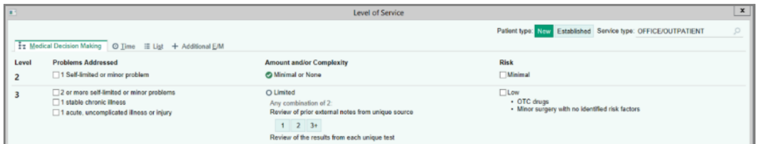
Once you have made your selection, you do NOT need to do anything else! Simply click out of the pop up window to return to your work space. This field will Auto Save and be visible in your Visit Taskbar



BACKPOCKET

If you are unsure of what to enter here, select the **magic wand** at the top right hand side. This will open up a more descriptive version of the LOS Navigator!

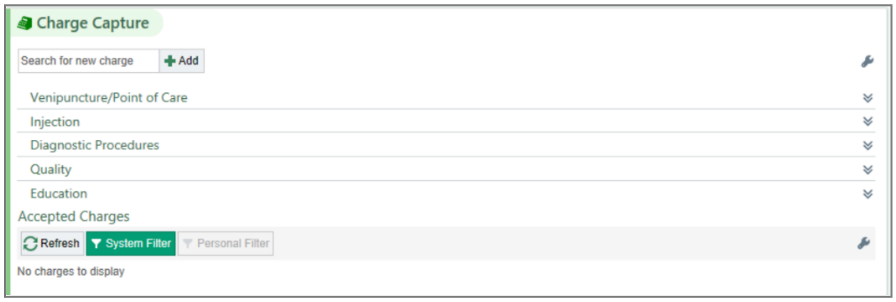




Charge Capture

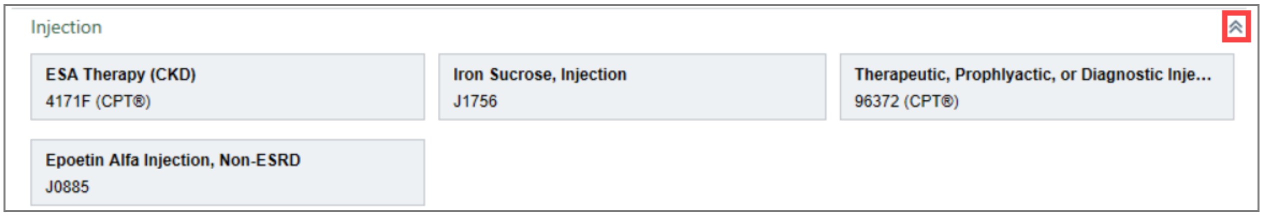
You will use Charge Capture if there are additional charges above and beyond the LOS.

Examples would be POCT tests, In Clinic Injections etc…

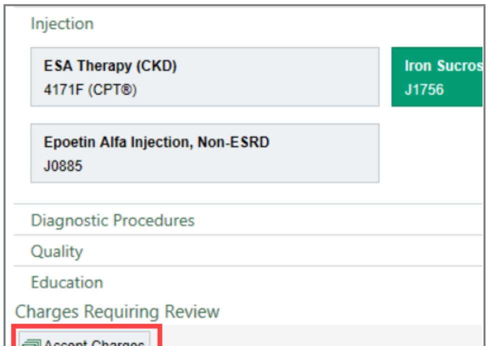


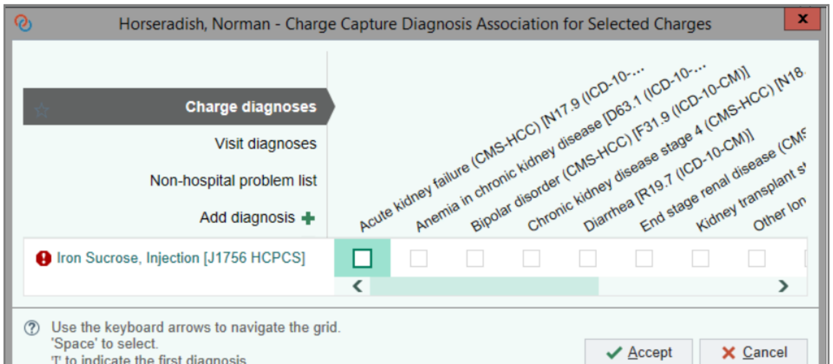
Expand the individual sections by clicking on the upside down arrows (chevrons) after the charge you want to include.

For instance, you can open up the chevrons after '**Injection**' to see your options. You then select the option that you need and it will be added to the visit charges!



If you select the '**Accept Charges'** button at the bottom left of the Charge Capture card, you will have the opportunity to associate Diagnosis for this charge right here in the window instead of doing it later when you go to sign the visit!





Completing Your Progress Note

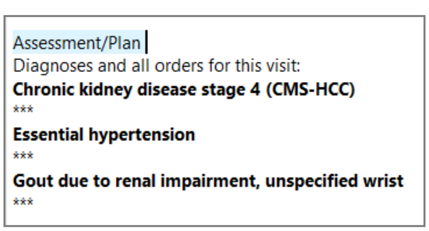
To recap, at this point you have placed some orders, documented a follow-up plan, selected a Level of Service, and completed the Subjective and Objective portions of your note

Now you need to finish your Progress Note and ‘**Sign the Visit’**

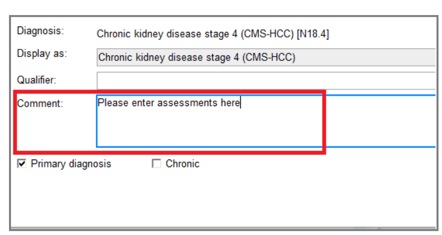
- Navigate back to your Note in the Sidebar. You can click the ‘**Edit’** button if the note has closed
- Scroll down to the **Assessment/Plan** section
- If you have taken actions since you last edited your note, you will want to ‘**Refresh’** your note to make sure it is up to date. It is a good habit to always click the ‘**Refresh’** button before finalizing any note
- Click the ‘**Refresh’** icon on the note toolbar

In order to give clinicians the ability to choose an option that best suits their workflow, we have updated all four note templates to include an assessment and plan SmartList with both the refreshable A&P and the non-refreshable A&P

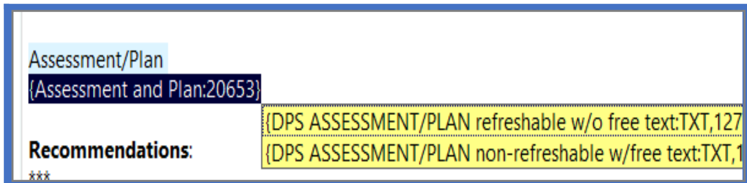
Non-refreshable



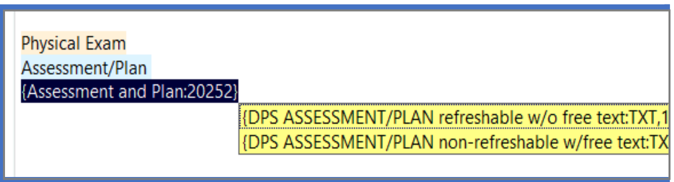
Refreshable



Basic/Detailed Templates



New/Follow Up Templates



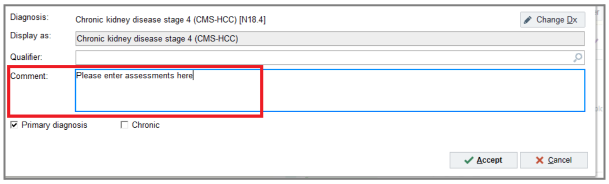
FYI- IMPORTANT

This is a multi-pick list where you may select the appropriate option.

Left click to pick the option and **right click** to insert into your note.

Keep in mind that since the refreshable link does NOT include wildcards, any Visit Diagnosis assessments must be made in the diagnosis '**Comments'** section:

- Navigate to Visit Diagnosis> Select the name of the diagnosis that you would like to access> document your findings in the comment field> Select Accept.



You may document your A&P under the Current Assessment and Plan field on the DX of the problem within the problem list and once added to the Visit DX the notes will carry forward.

Pressing **F2** will find anything remaining in my note that still needs to be documented

If the patient qualifies for any Quality Measures that require a follow-up plan to be documented, you can use that wild card(s) to add free text or pull in a SmartPhrase

Signing the Visit

When you're ready to close the visit and send it to billing, select the '**Sign Visit'** button in the Visit Taskbar (lower right corner).

It's important to remember:

- Charges are **not** sent to billing until the Visit is Signed

- Once the encounter is closed, the patient can see information like the reason for visit, vitals, med list, follow-up instructions, patient instructions, and upcoming appointments in their MyChart portal
- Click **Sign Visit** in the bottom taskbar

- If there's missing documentation, you will see a red icon to click on:
  - Click the red banner to jump to the area(s) of the chart that need attention
  - Click needed actions (print/send communication at close of encounter)
- When all documentation is complete, you can select the '**Sign Visit'** button
  - Notice you are brought back to Schedule and the status for Norman has changed!

BACKPOCKET

If the encounter isn't submitted for billing within 24 hours, you'll get a '**My Open Charts'** message in your '**In Basket'** reminding you to close the visit

Exercises

For this next exercise, we are going to document everything that we just learned! We will be using our **Nadir** patient for this. Nadir has NOT been roomed by the nurse yet, however you can still document this visit for training today.

Of course, in real life, your patient will have already been roomed.

Follow these steps, using **YOUR OWN DATA**, to complete this exercise!

1. Open chart
2. Review Info Sidebar and mark as reviewed
3. Start Your Note and sign
4. Document ROS (review of Systems) and PE (Physical Exam)
5. Update the Problem List- remove a DX and add a new DX
6. Add the Visit DX- Make sure there are at least 2 DX here
7. Add a new Medication
8. Refill another Medication
9. Discontinue a Medication
10. Change Patients Preferred Pharmacy
11. Order 2 lab tests of your choice
12. Order an X-ray
13. Order a Referral
14. Document Level of Service
15. Edit your note, refresh and sign the note
16. Sign the Visit!

Your Instructor is available to answer any questions that you may have and, of course, you can look back in this manual for assistance!

Stop here and wait for the Instructor to continue

TeleHealth Visits and Documenting

Increase patient accessibility by connecting with your patients virtually! Telehealth visits save patients a trip to the clinic and allows providers to connect with and care for patients even when they're not with you in person. The new CKD EHR Telehealth option is completely integrated with your current system, eliminating the need for third party video connection options.

For an optimal experience, it is recommended that when telehealth visits are conducted, Providers use two or more computer screens.

- Screen 1 to cast the telehealth call
- Screen 2 to document in CKD EHR

Integrated Telehealth Visits for Front Desk

Unintegrated Telehealth Visits allow providers to see patients via remote video connection and have been available in CKD EHR by Epic for some time, but starting in March 2022, practices have the option to enable Integrated video visits accessed directly in Hyperspace.

FYI- IMPORTANT

It is important to note that there are two fields involved in scheduling video visits, and your practice type determines which are used:

- **Visit Type**: Indicates the type of visit and varies according to purpose of visit. **Only Interfaced practices** (that schedule in a 3rd party system) should use the new '**Telemedicine Remote Visit**' visit type for Integrated Video Visits.

- **Visit Mode**: Indicates how the visit is carried out, either in person, by phone, or video. **Enterprise and Non-Interfaced practices** should use the '**Video**' visit mode option for all video visits in order to preserve accurate appointment reporting and statistics.

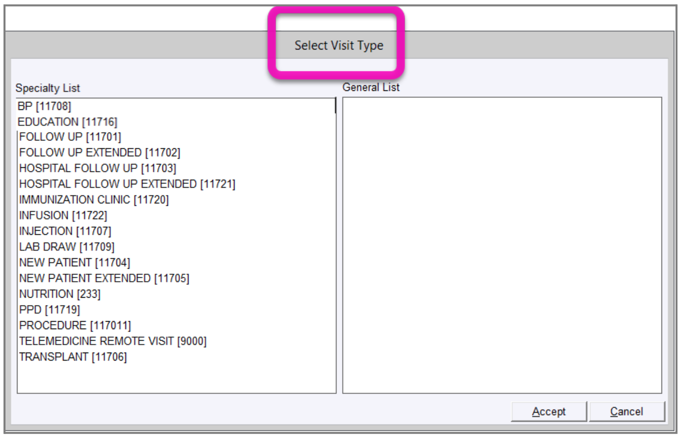
This document covers a few specific workflows that only apply for integrated video visits. Visit the Learning Home Dashboard in Hyperspace for more tipsheets on regular scheduling and appointment related workflows.

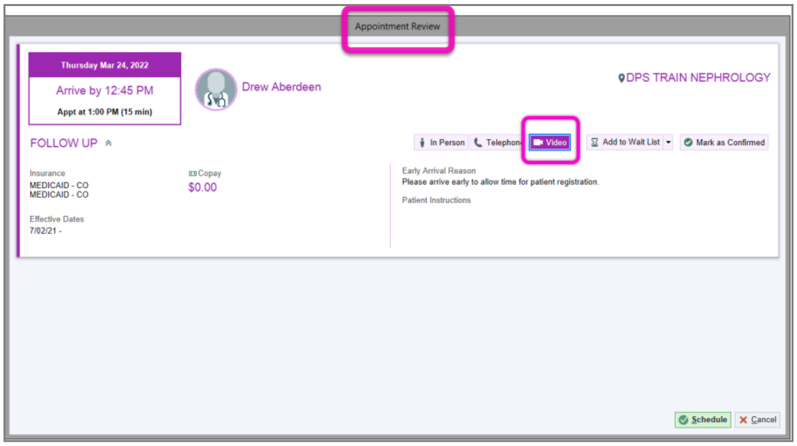
Scheduling Integrated Telehealth Visits in Epic with Visit Mode

The process to schedule and check in integrated video visits is the same as for unintegrated video visits and should be used by any practice that schedules visits directly in CKD EHR by Epic that is Enterprise and Non-Interfaced practices should follow this process:

- From '**Make Appt'**, schedulers should choose the most appropriate option from dropdown for **visit type** [A] when scheduling and select '**Video**' for visit mode [B] at the appointment confirmation screen.

- Refer to the Schedule Appointments tipsheet on the Learning Home Dashboard in Hyperspace for basic appointment scheduling assistance





A

B

- Refer to the Schedule Appointments tipsheet on the Learning Home Dashboard in Hyperspace for basic appointment scheduling assistance.

Turn Appointments into Telehealth Visits

<table>
<tr><th colspan="2">REMINDER</th></tr>
<tr><td></td><td>As a reminder, only Interfaced practices that schedule outside of CKD EHR by Epic should use the Telemedicine Remote Visit Type.
The best practice is to <u>not</u> make any changes to an appointment after the patient has been checked in and the appointment is marked as arrived!
this does not include pre-charting by clinical staff which may happen prior to arrival.</td></tr>
</table>

There are two ways to turn an appointment to a telehealth visit type after it has been scheduled as a different visit type.

The method used depends on the check in status for the appointment and whether you need to change the date or time of the appointment as well.

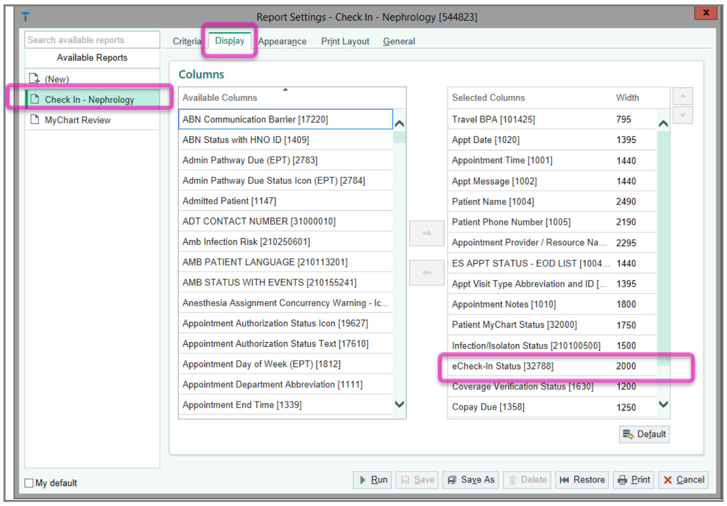
FYI- IMPORTANT
Critical Note- If a payment has already been collected for the appointment, regardless of check in status, you will NOT be able to change the visit type nor the visit mode. ● **If you need to change the date or time of the appointment, you need to cancel and reschedule it.** ● Otherwise, you can *change* it. ● After you've turned the appointment into a telehealth visit, you need to notify the patient of the change. You also need to help them sign up for MyChart if they don't already have an active MyChart account, so that they can enter the video visit via MyChart.

Checking Patient eCheck-in Status

On the '**Department Appointments Report'** (DAR) settings, add the '**eCheck In'** column to your DAR.

Note: the default Check In Nephrology report has this column already added, see below to add this or other fields.

- If the column shows '**In Progress'** or '**Completed**', *you need to cancel and reschedule the appointment.*
- If the column shows '**Not Started'**, you can *change* the appointment.



Configure the DAR to show additional columns

Use the steps below to update settings for the '**Department Appointment Report'** (DAR) to show either the eCheck-In Status or the Appt Confirmation Status.

1. Open the **DAR** (use chart search and enter "DAR - Dept Appts**"**)
2. Select '**Display'** tab
    - o Under '**Available Columns'**, select the field you wish to add
    - **o** Use **right arrow** to add the field to '**Selected Columns'**
    - o Use **Up/Down** arrows to rearrange columns
3. Select '**Save As'** to save this report setting, then select '**Run'** to view the **DAR**

Cancel and Reschedule an Appointment

If the patient has already started eCheck-in, or if you need to change the date or time of the appointment, you will need to cancel the appointment and reschedule it as a telehealth visit.

1. Open the Cancel Appts activity:
    - From the Department Appointments report (search: DAR - Dept Appts), select the appointment you want to cancel. Click '**Cancel**' on the toolbar or right-click the appointment and select '**Cancel**'

2. From the **Appointment Desk** (search: Appts), go to the ‘**Future’** tab and select the appointment you want to cancel. **Click Cancel/Reschedule on the bottom toolbar**.
3. In the ‘**Cancel Reason’** field, enter the appropriate reason. This is needed even though you are rescheduling the appointment.
4. Click ‘**Reschedule**’.
5. Remove the previous visit type and add the ‘**Telemedicine Remote Visit’** visit type.
6. Continue scheduling the visit as appropriate.

Change an Appointment

You can change the appointment only if the patient hasn't started eCheck-in and you don't need to change date or time of the appointment. Otherwise, you need to cancel and reschedule the appointment.

3. Open the ‘**Change Appointment’** activity:
    - From the Department Appointments Report (search: DAR - Dept Appts), select the appointment you want to change. Click ‘**Change**’ on the toolbar or right-click the appointment and select ‘**Change**’.
    - From the Appointment Desk (search: Appts), go to the ‘**Future**’ tab and select the appointment that you want to change. Click ‘**Change Appointment’** on the bottom toolbar.
4. In the Visit type field, select ‘**Telemedicine Remote Visit’**.
5. If providers in your department use shared workstations to conduct telehealth visits, you might need to add more providers to the appointment.
    - To do this, click ‘**Add Row’** and fill in the department, provider, appointment time, and visit length.
6. In the ‘**Change Reason’** field, enter a reason why you are changing the appointment.
7. Click ‘**Change**’.
    - If the Calculated Lengths Update window appears, click Use Mine to keep the visit length the Appointment Review same.

- If the ‘**Appointment Warnings’** window appears, click ‘**Continue**’.

8. In the window, click ‘**Accept**’.

Sign up the Patient for MyChart

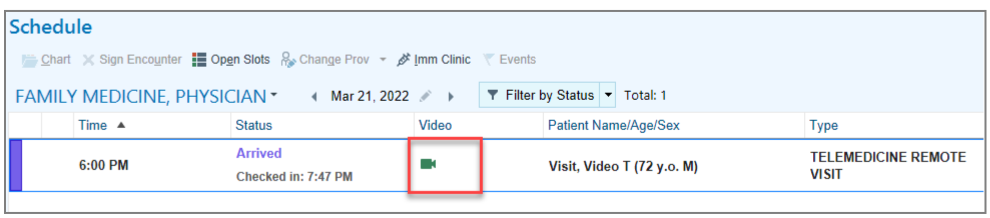
If the patient does not have an active MyChart account, they need to create one before their telehealth visit. You can get them started by sending them activation information in a text message or email.

1. Open the ‘**MyChart Administration’** activity:
    - From the patient's ‘**Appointment Desk’**, click the ‘**MyChart’** icon in Storyboard.
    - Or, ‘**Chart Search’** for ‘**MyChart Administration’** and select the patient.
2. Click ‘**Send Text’** or ‘**Send Email**’.

Identify a Telehealth visit from the Schedule

Telehealth enabled visits can be identified by the icon in the Video column of the provider schedule.

Once the patient has entered the virtual waiting room, the appointment ‘**Status’** will automatically update to ‘**Arrived’**. The icon will turn green.

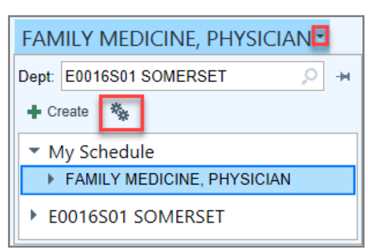


- If a patient has encountered any issues connecting to their video visit, a appears in the Pre-Visit Status column. This means the patient may be late to their visit or might need help troubleshooting before connecting.

Add the Video and Pre-Visit Status Column to your schedule

If the Video column is not present, quickly add the column from the Settings activity in the schedule.

1. From the **Schedule**, select the **Settings** icon.



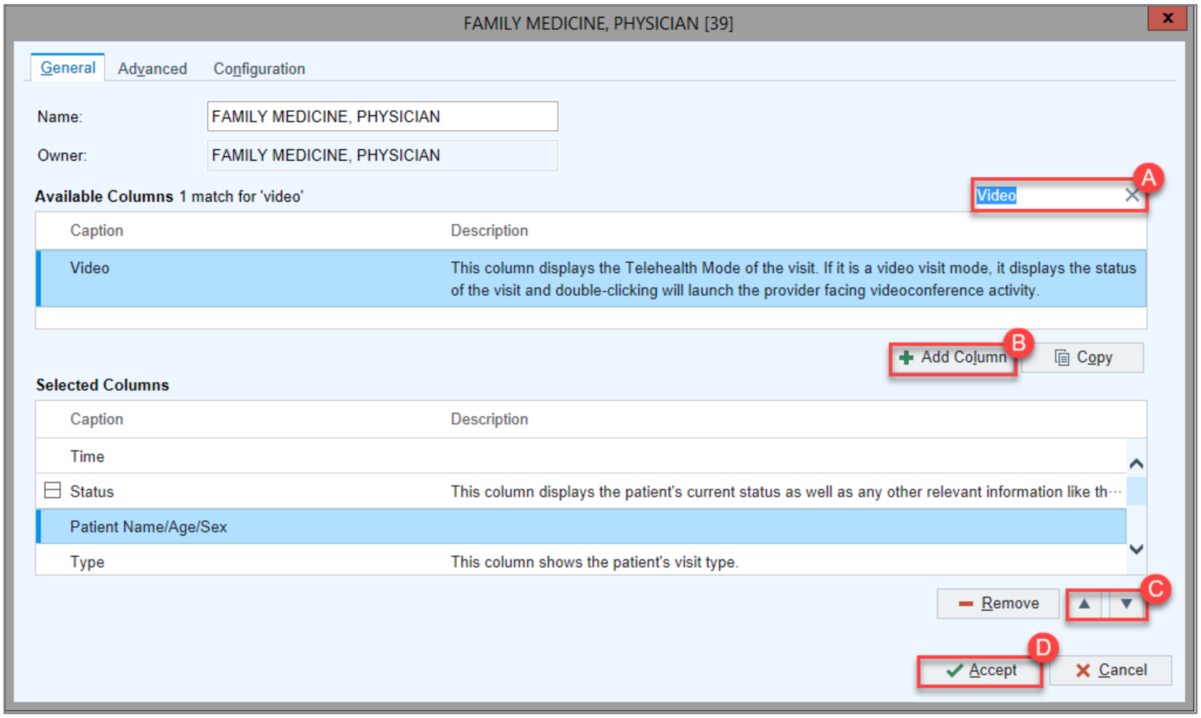
2. The configurations window will populate

    A. Search ‘**Video**’ in available columns.

    B. Select ‘**Add Column’**.

    C. Use ▲ ▼ to personalize where the new video column will be displayed.

    D. Click ‘**Accept’** to save your changes.

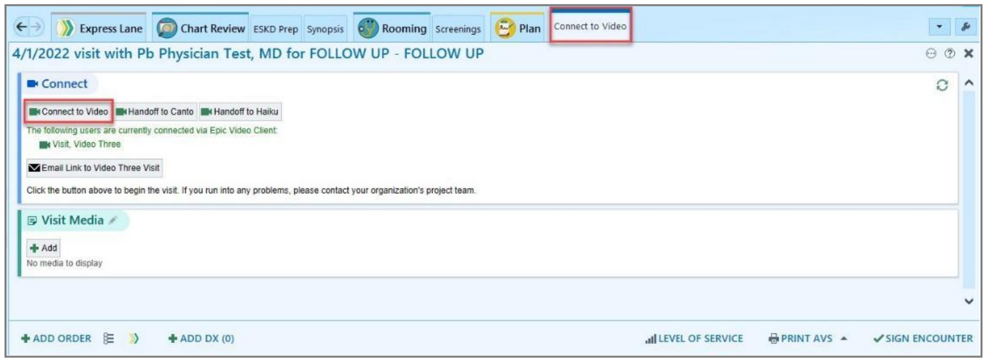


Start a Scheduled Telehealth Visit from your computer

FYI- IMPORTANT	
	<u>Note if your default or preferred browser is Internet Explorer or Edge:</u> Because of browser compatibility, once the link to the telehealth call has been generated in Internet Explorer, <u>users will need to copy and paste the link into a preferred browser for this function.</u> Recommended browsers are:

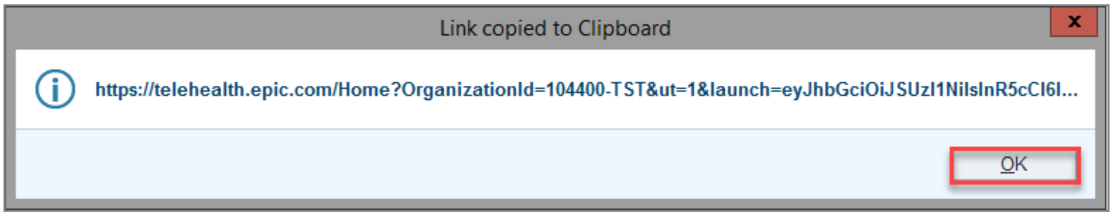
- Chrome
- Firefox

To connect directly to the patient from the multi-provider schedule, double-click the green video icon in the '**Video**' column.



- The encounter will open the new '**Connect to Video'** activity.
- Choose '**Connect to Video'**.

A pop-up will display alerting you that the link for the telehealth visit has been copied to your clipboard.



Open a preferred browser (Chrome or Firefox) and paste the link to connect to your telehealth video.

Start a Scheduled Telehealth Visit from your Mobile Device

1. Log in to the mobile device. Then, log in to the Haiku or Canto application.
2. Find the video visit on the schedule. Look for the video icon next to the appointment time.
3. Tap the patient's appointment to open the chart.
4. Click Telemed on the toolbar to open your video visit options.

FYI- IMPORTANT

While you're conducting a video visit, the Telemed activity takes up the full screen, so you can't access other activities while you're connected to the video.

If you do navigate to a different activity to document in the patient's chart, the video visit is paused and the patient sees your initials in a circle instead of a video image until you return to the video visit.

If you only have the patient's visit open on your mobile device, you can't access other activities while you're connected to the video and will have to complete documentation after disconnecting from the video.

Keep the following options in mind if you need to adjust the video or audio:

- The patient has a **Patient Privacy** button on their video visit window, which allows them to turn off the video while they are changing their clothes, for example.

- You can pin a participant so you can always see them, even when there are up to five participants in the visit and they aren't the active speaker. To do this, click the video or name of the participant whose video you want to pin. Click their name or video again to unpin the participant.

- If you don't want to use your name or full name for the video visit, you can edit the Display
    - Name field during the hardware test step.

- In most cases when using an iOS device with a headset, the iPhone/iPad itself will smoothly handle connected headsets, switching to them automatically. However, in rare cases where they are not automatically selected or the user would like to manually change, users can easily switch in their device settings or in the iOS Control Center's "Now Playing" widget. Available devices will be available to switch between in this menu.

- If you want to have Hyperspace and the video visit on the same screen, and you use either Google Chrome or Microsoft Edge browsers, you can right-click the video and select Picture-in- Picture. This puts the video in a small window you can drag around the screen.

You can use these buttons in the video window to do the following:

- Click to temporarily turn off your webcam.
- Click to adjust the volume.
- Click to mute your microphone.
- Hover over to reposition the video window. Buttons appear so you can move the window to different parts of the screen with one click.
- Click to choose which camera device you'd like to use if your organization has multiple devices set up for telemedicine.

Keep the following tips in mind when conducting your visit:

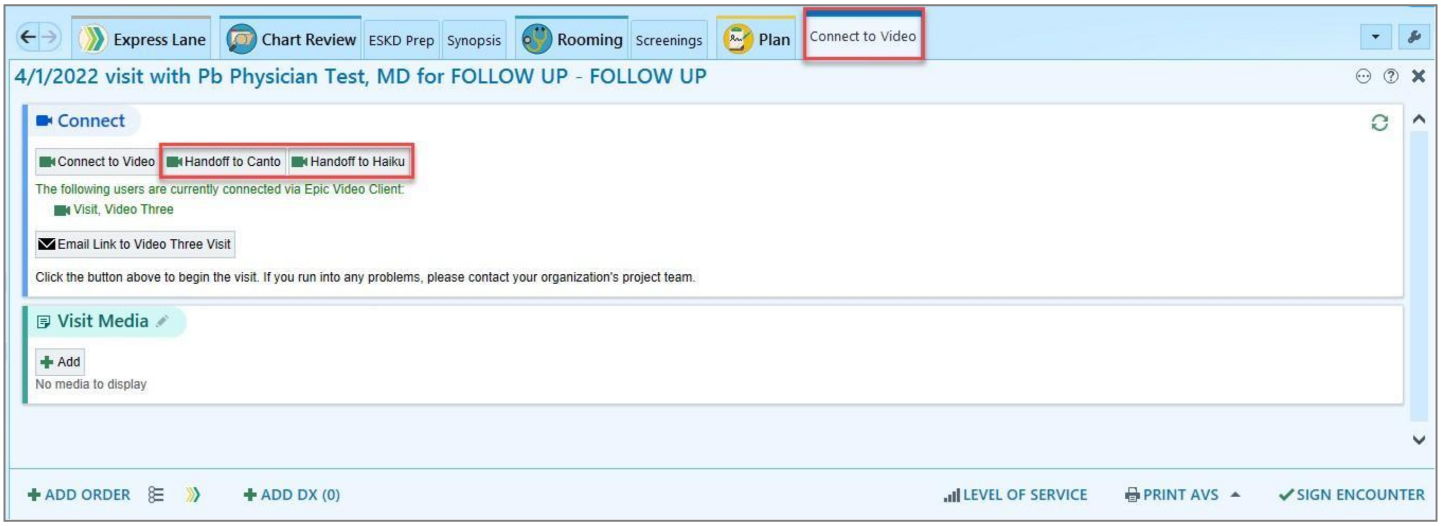
- **Establish eye contact.** Remember to look into the camera when addressing the patient. Make sure your webcam is at eye level. Moving the video window closer to your camera makes this easier.
- **Consider your setting.** Examine the room from the patient's perspective. What will they see behind you? What kind of background noise will they hear?
- **Let the patient know of any delays.** If a time delay is inevitable, make sure you have a way to notify the patient.
- **Dress in your usual attire**. We recommend the same level of professional attire as you wear in your typical practice.
- **Clarify your actions**. Your actions might not be as obvious over video as they are in person. For example, if you are looking down to take notes, let the patient know what you're doing.
- **Ask the patient for feedback**. Determine how comfortable the patient is with the video visit and how you could adjust things going forward.

When you're finished talking to the patient, close the video window to disconnect.

Sending the Telehealth Visit to your Mobile Device

If you open a video visit on your computer, you can send it to your mobile device. This can be helpful if you want to keep the patient's chart open on your desktop and complete charting while the video and audio use your mobile device.

- Find the patient's video visit on the schedule and open the encounter
- Go to the '**Connect'** section of your navigator
- Clic **Handoff to Haiku** or **Handoff to Canto** to send a push notification to your device
- Slide the notification on your mobile device to unlock the device and open the patient's chart in Haiku or Canto
- If you are the first one to join, tap '**Start Video Call'** to begin the video visit
- If the patient has already joined, tap '**Join Video Call'**.



Connecting with a Patient who cannot access MyChart

If a patient hasn't signed up for MyChart, loses access or cannot navigate to the correct screens, Providers have the option to email a link to the telehealth visit from their navigator.

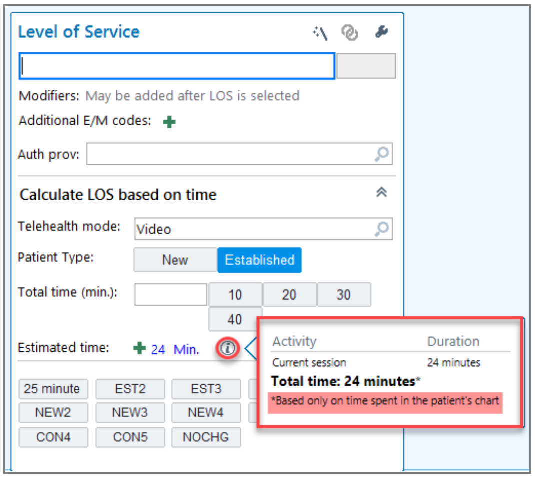
- From the Connect section of the navigator, select Email Link to (Patient Name). Hover over this button to confirm the

email address for the patient.
- A link will be sent to the email listed in patient demographics.

Calculating Time Spent with a Patient in a Telehealth Visit

Reminder: If you are conducting the telehealth call from your computer, you can simultaneously complete documentation during the visit.

If the visit is being conducted from your phone, you will need to document visit details after the call is completed. Documentation workflow for telehealth visits in CKD EHR is similar to that of an in-person visit.



1. Open the '**Level of Service'** activity.
2. Hover over the ⓘ icon to review **Activity**, **Duration** and **Total time** in the window. This time calculates total time spent in a patient's chart.

Telehealth SmartPhrase

A new SmartPhrase has been created to aid in documenting total video connection time spent in a telehealth visit in your note.

- From the note activity, use the **.myvideotime** command to pull in total end-to-end video connection time spent with your patient.

Mobile Applications User Guide

Installing Haiku/Canto on your mobile device

Haiku and Canto applications require **version 14.2** or later to connect to CKD EHR by Epic.

You must also have the latest version of iOS or Android software on your mobile device.

Haiku and Limerick can be downloaded on:

- Apple iPhone®
- Apple iPod touch®
- Android Smart Phones

Canto can be installed on:

- Apple iPad®

On your iOS device, tap to open the App Store and search for "Epic Haiku". Next to the Epic Haiku app in the search results, select GET. When prompted, enter their Apple ID

On your Android device, tap to open the Google Play store and search for "Epic Haiku". In the search results, tap and install the Haiku for Android app

On your iPad search for and download "Epic Canto" from the App Store. If prompted, enter your Apple ID

install the below configuration link:

https://mobileconfig.davitaphysiciansolutions.com/mobileconfigs/MobileconfigsProduction.html

This may be easier to copy and email to yourself!

Once installed, you will log in using your **Active Directory Username and Password**

When you leave Canto to go to your device home screen or switch to another app, Canto continues to run in the background

For security reasons, Canto automatically logs you out after **20 minutes** of inactivity. You can also manually log out

For Canto - Tap 

from the dashboard and tap **Logout**

For Haiku – Tap More> Options> Logout

Logging In:

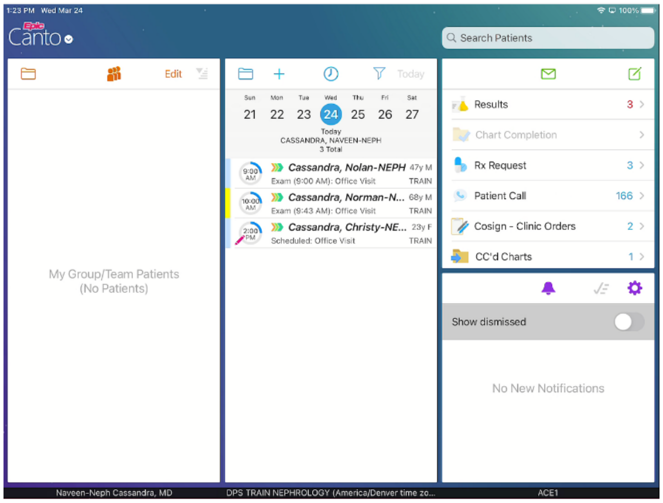
After a clinician logs in with their full credentials and creates a PIN, subsequent logins within a certain time frame require only the PIN.

The default length of time that a user can continue to use a PIN after logging in once with their full credentials is 14 hours, which should accommodate the length of most shifts where a user would be blocked from using biometrics due to wearing PPE.

If, during that 14-hour window, the user doesn't open the app for 120 minutes, when they subsequently log in, they must use their full credentials again for security.

After you configure PIN login for Haiku and Canto, users who prefer to use biometrics to log in but cannot do so while wearing PPE, like a face mask or gloves, can use a PIN for subsequent logins instead of entering their username and password each time. They can still use biometrics by tapping the biometrics button from the PIN login prompt as well!

Dashboard



The dashboard is Providers home workspace in Canto and Haiku.
From the dashboard, users can open:

- ❖ A patient's chart by tapping on the patient's name from their Schedule, or by searching the patient's name in the “Search Patients” field
- ❖ An In Basket folder by tapping on the name of the folder
- ❖ The Multi Provider Schedule that allows them to see their own schedule, or the schedule for their clinic.

> FYI
> Users can customize the activities that appear on the dashboard from their device settings

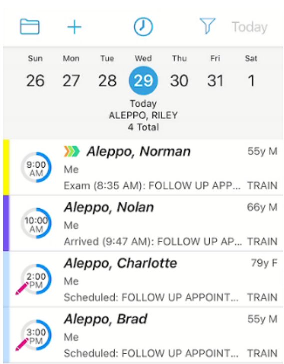
What Is An Activity?

Each activity supports a specific task, such as reviewing the chart or e-prescribing medications. You can access activities from the tabs on the bottom of the screen or by tapping a patient's name from the schedule or patient list.

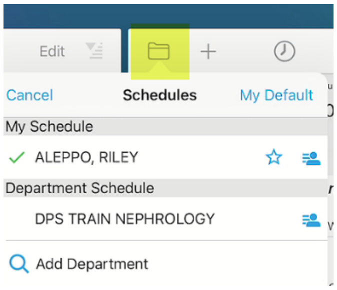
See More Of The Screen

Hold the device horizontally, in landscape mode, to make more efficient use of the screen when reading patient reports or In Basket messages.

Schedule

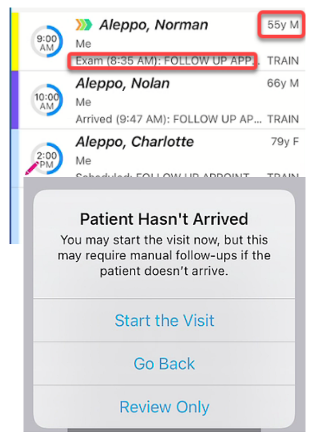


Your schedule will be displayed in the middle column of your Dashboard. Select a date on the calendar view to see your schedule for that day.



To see schedules for other departments, or colleagues, tap . Select a schedule to open it, or tap My Default to return to your default schedule

The schedule shows each patient's age and sex, as well the appointment type. The ring icons that appear around the appointment time indicate the appointment's time and length. These colors will match what is seen in Hyperspace.

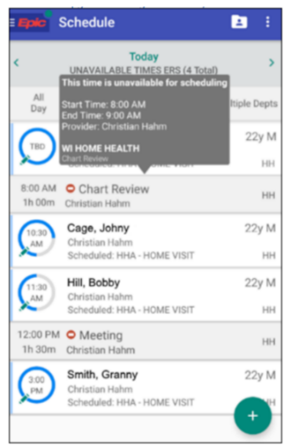


If the Patient has not arrived and you want to review their chart in advance, you can select that Patient and CKD EHR by Epic will give you the option to Review Only, Go Back or Start the Visit.

FYI

At this time, there is no Pre-Charting activities when in a Mobile Application.

The schedule shows times that are unavailable for scheduling, such as scheduled meetings, so that users do not accidentally attempt to schedule patient visits during those times.



Unavailable times appear as gray rows on the schedule and do not have a pencil icon to edit them.

Unavailable times cannot be entered or edited in Haiku or Rover. Users can manage unavailable times in Hyperspace or on the Remote Client.

Users who do not want to see unavailable times can tap the menu button, select Options > Schedule Settings, and turn off this feature.

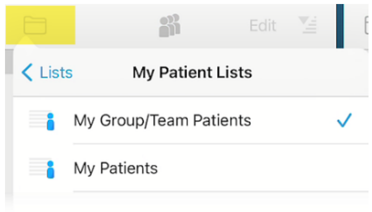
Patient Lists and Functions

Find Patients

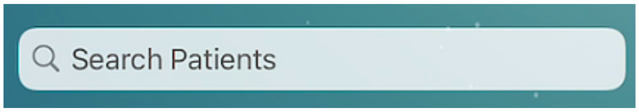
In Haiku, to search for a Patient, you will select the "**Patients"** icon to navigate to the patient list

For Canto, the **<u>"Patient List</u>**" displays on the left side of the Dashboard Screen

To see the Patient list of other providers or your Team, Select the **Folder Icon** at the top left and select which list you want to see.



To Search for a Patient that is not on your Schedule or Patient List, there is a Search Bar at the top right side of the Dashboard Screen.



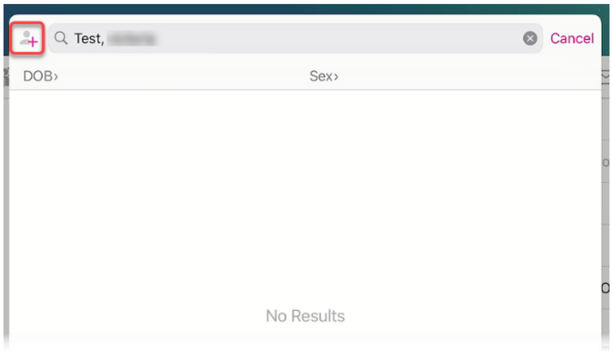
Search as you would normally do in Hyperspace, using the patient's name or MRN, as well as sex or date of birth, and the results appear with more patient details, such as address.

If you select a patient from a search, any documentation you do in Haiku or Canto is linked to the most recent available encounter.

If Haiku or Canto can't find a recent encounter for the patient, a new encounter is created to store your documentation.

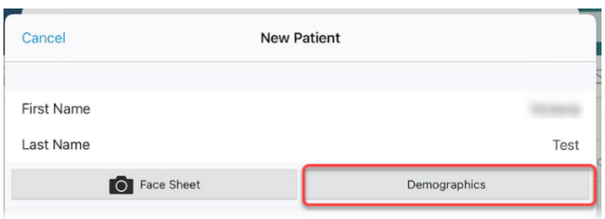
Create Patients

Now, let's say that we need to document on a patient that is not in CKD EHR. For this, you will need to create a Patient on the fly.



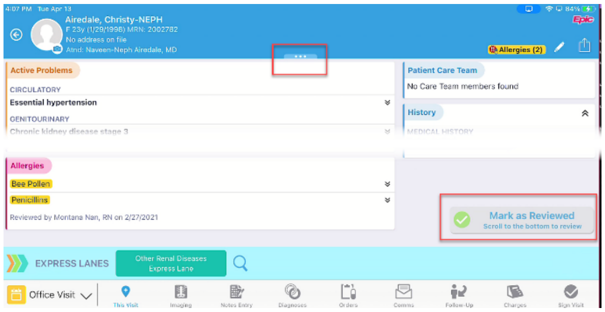
- Search for the patient in the "**Search Patient**" box on the top right side of your Dashboard. If you cannot find them, tap on the **Add Patient** icon (As seen here) and search for the name of the patient. The provider is then given the option to Create a New Patient.

- If looking from the Patient List screen in the Dashboard, select edit and search for the patient by selecting the PLUS Icon. If you cannot find them, select the **Add Patient** Icon (Same icon as above)
- The provider then enters the patient's first and last name (in Last, First format), then completes:
    - <u>**Demographics**</u>- Fill in Date of Birth, Sex, and Social Security number. If the SS # is unavailable, or they do not have one, you can mark this as "Unknown"
        - Any field that has a RED Exclamation Point is a mandatory field and you must put data there to move on



        - When finished, select the "Save" function and you will now see this Patient in your Patient list. Select "**Done**" at the top right to exit out of the Edit Activity.
    - <u>**Patient Facesheet**</u>- You can enter a photo using the device. This data will need to be entered into the patient's chart at a later time, and the photo cannot be viewed on the device in the Media Viewer activity or in the patient header.

Patient Summary

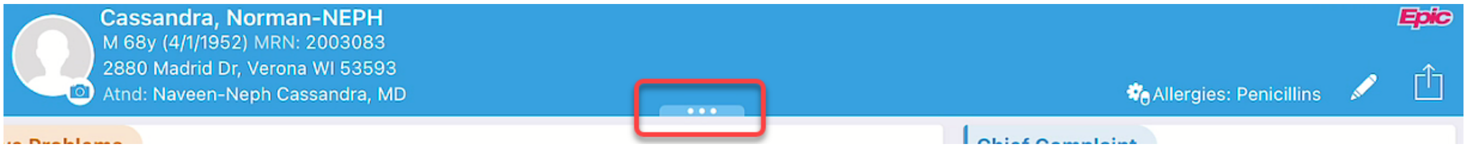


You can see an overview of the patient's current medical information from the Patient Summary activity, which appears when you open a patient's chart.

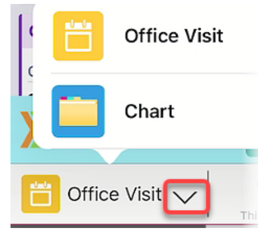
<u>Mark Information As Reviewed</u>

In the Patient Summary activity, tap **Mark as Reviewed** to record that you've reviewed the patients information.

This is located at the very bottom of the Patients chart **OR** located within the 3 little dots at the top middle of your screen.

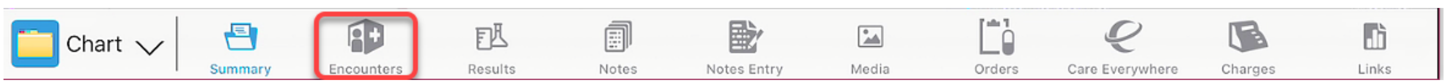


<u>Review Past Encounters</u>



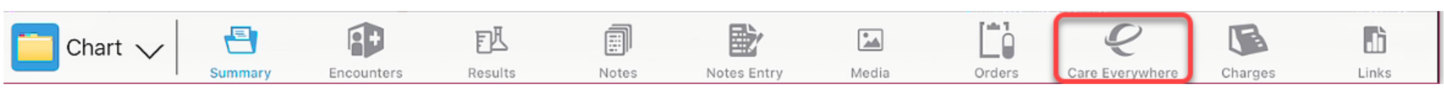
To view previous Encounters while in the Patients chart, click on the arrow dropdown next to "Office Visit" and **<u>select</u>** "Chart" on the bottom left of your screen.

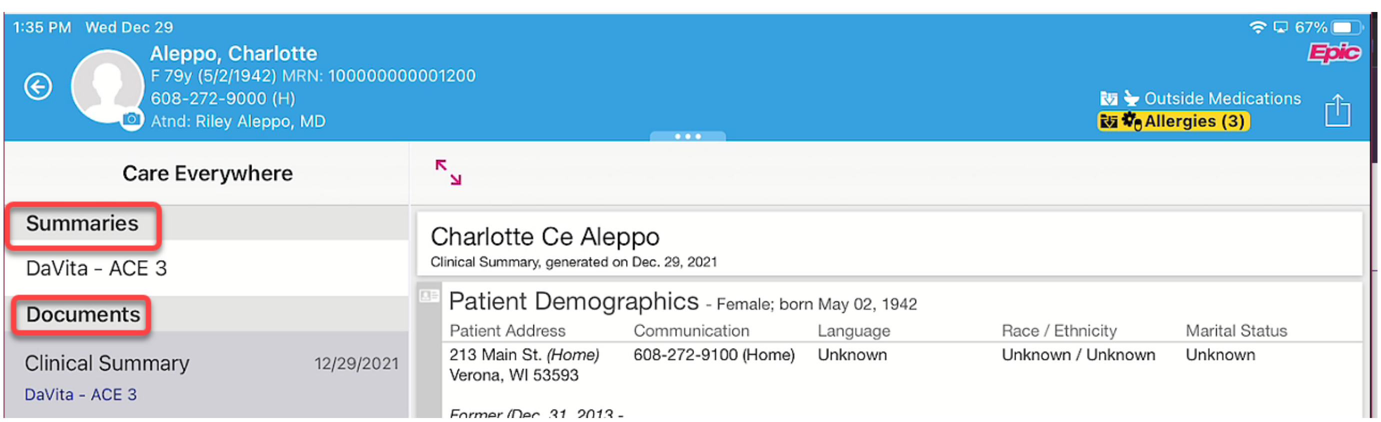
From the Encounters activity, you can review information about previous encounters. Tap an encounter to review it.



<u>Review Documents From Outside Organizations</u>

From inside of a patient's chart, tap **Care Everywhere** to open the Care Everywhere Reports activity.





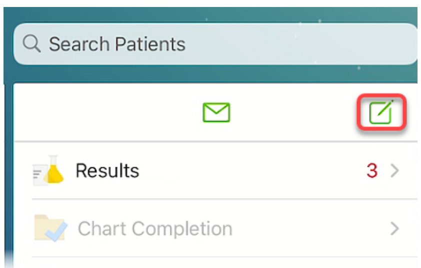
On the left side of your screen, you see that there is a **<u>Summaries</u>** and a **<u>Documents</u>** section. Select one of these to see the information brought over from the Care Everywhere Function.

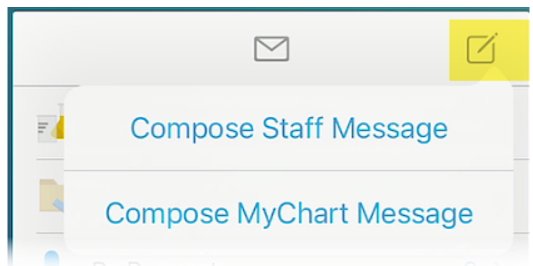
Also, you can see at the top of your window on the right, there are alerts notifying you that there is Care Everywhere information that you can view and/or reconcile, if warranted.

Compose Patient or Staff Message

From Haiku and Canto you can now compose a Patient MyChart Message, send a Staff Message or reply to a message within your InBasket

From the Haiku or Canto In Basket, tap the **icon that looks like a piece of paper with a pen** and select the type of message you want to compose.

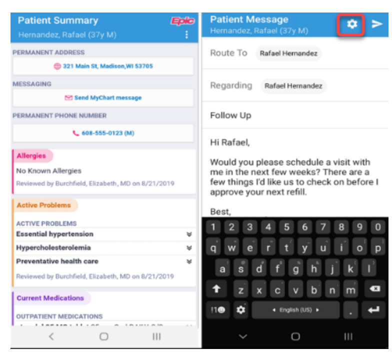




Type to enter the message.

<u>NOTE:</u> Speech-to-text is not available in Pt Medical Advice messages.

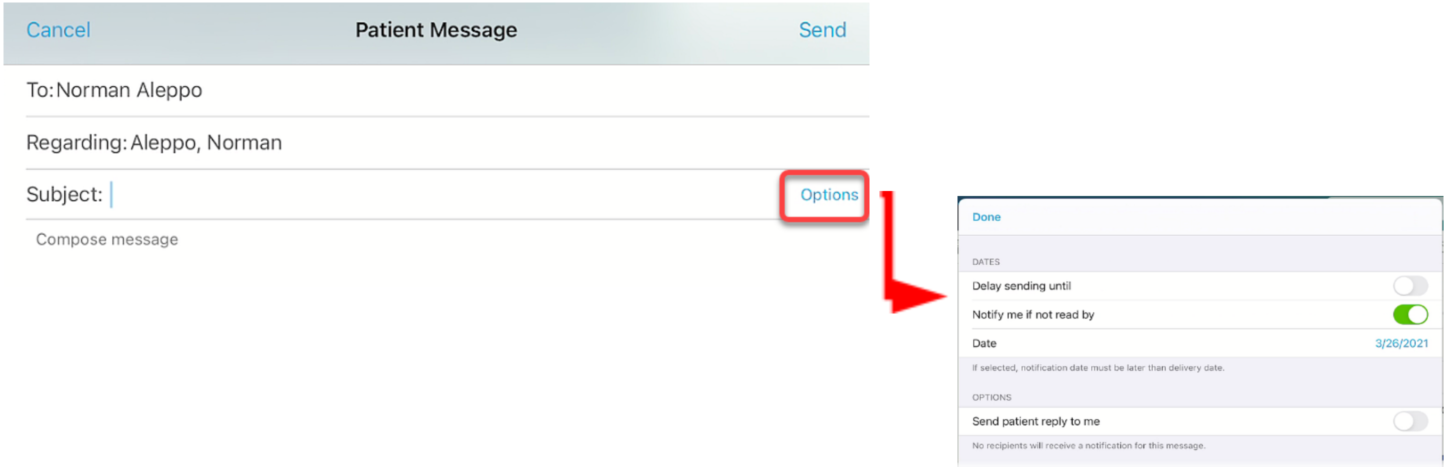
On IOS:



- Tap the Gear Icon to:
  - Schedule a message for later
  - Get notified if the patient doesn't read it.
  - Change how replies are handled.

On Android:

- Tap the "**Options**" to:
  - Schedule a message for later
  - Get notified if the patient doesn't read it
  - Change how replies are handled



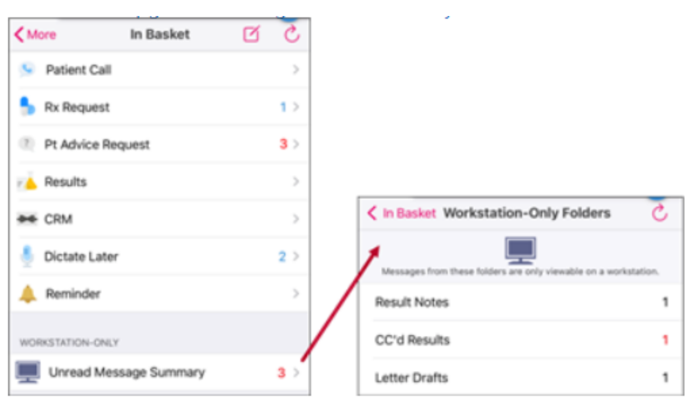
InBasket

In the In Basket activity, you can read and respond to many types of messages, including:

- Results Messages
- Staff Messages
- Pt MedAdvc Rq <u>(Patient Medical Advice Request)</u>
- CC'd Charts
- Patient Reminders
- Rx Request
- Co-signing Clinic Orders
- Patient Calls
- Patient Reminders

The In Basket folder appears with the number of unread messages.

- The number will appear in red if any of the unread messages are high priority.
- If you don't have any unread messages, no number appears.
- For iOS devices, when clinicians view their In Basket, they can see how many unread messages there are in folders that aren't accessible from their mobile device. Even



though the message text isn't available, they can see if they have new messages to read on a workstation.

- For iOS and Android devices, folders that are empty no longer appear. This replaces the behavior of empty folders appearing grayed-out.

Swipe left on an In Basket message and tap **Defer to Workstation** to remove the message from your mobile In Basket. Messages you defer appear in your Hyperspace In Basket, but are hidden from your mobile In Basket.

Working with Staff Messages

To create a new Staff Message, select the Compose Icon from the In Basket activity

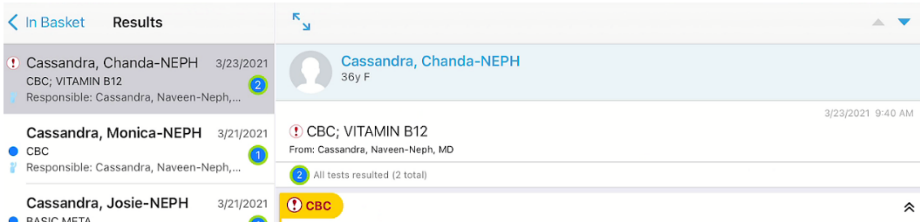
- Write your message and, optionally, add the following flags to your message before sending it:
  - The phone icon flags the recipient to call you
  - The exclamation point flags the message as high priority

- Tap **Send** to send the message

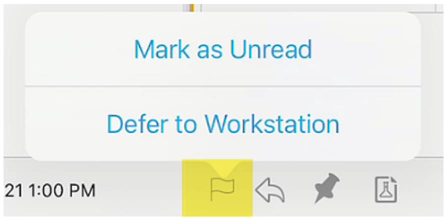
When you receive a Staff Message, tap to reply or forward the message.

Review Results

Tap on the Arrow to open the Results Activity. Select the results/Patient on the left that you want to view. Use Chanda for this.



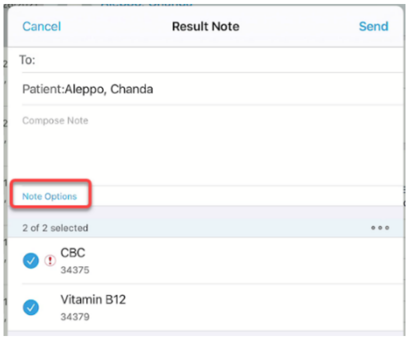
At the bottom of your screen, there are 4 icons and a button for Reviewed



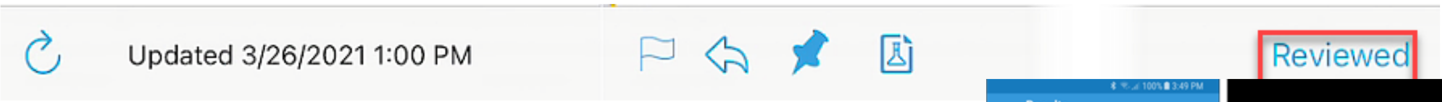
1. The first icon is a flag. You can use this to Mark as Unread or Defer to Workstation
2. The second icon is an arrow. This is used to Forward the message or assign to another Provider
3. The third icon is a push pin. You use this icon to post a Patient Reminder. If you see a result in a Results message that you want to investigate further, you can send yourself a reminder to do so. The reminder is sent as a Patient Reminder message with the original Results message attached to it.

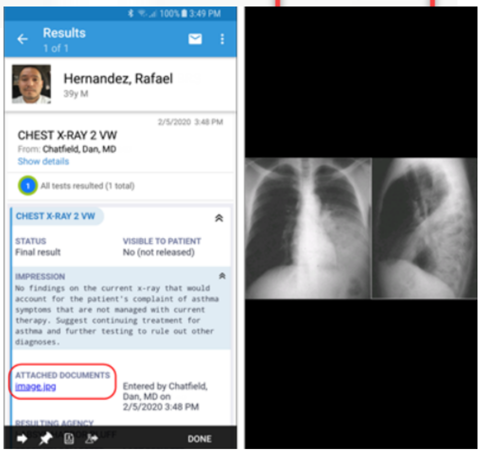
You can only access the reminder message in your Hyperspace In Basket

4. And finally, the fourth icon. This is used to document a Result Note. If you want to mark the note as Important, select the **Important** option located under **Note Options**



Once you have finished working the Results folder, you can select **Reviewed** to remove that/those message from your In Basket.

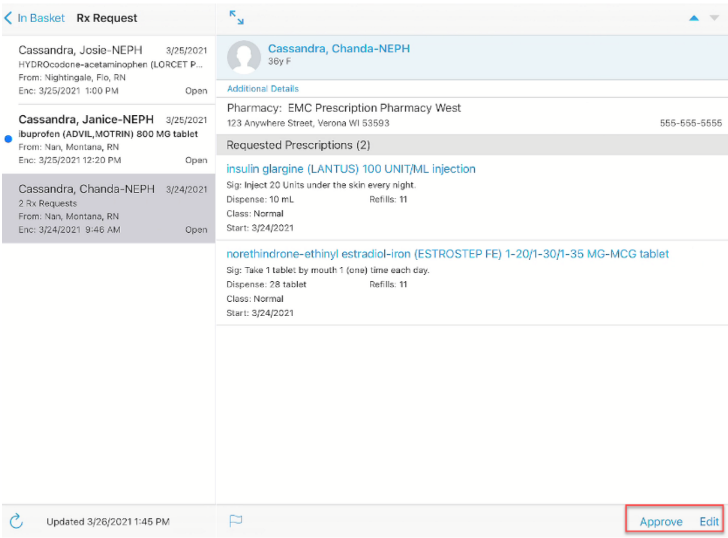




Users can open media attachments such as images and PDF documents from a result report in Haiku and Canto. For example, if a lab result has an image attached to it, a clinician can tap a link to see the image while they're reviewing results from the Results activity.

Refill Prescriptions

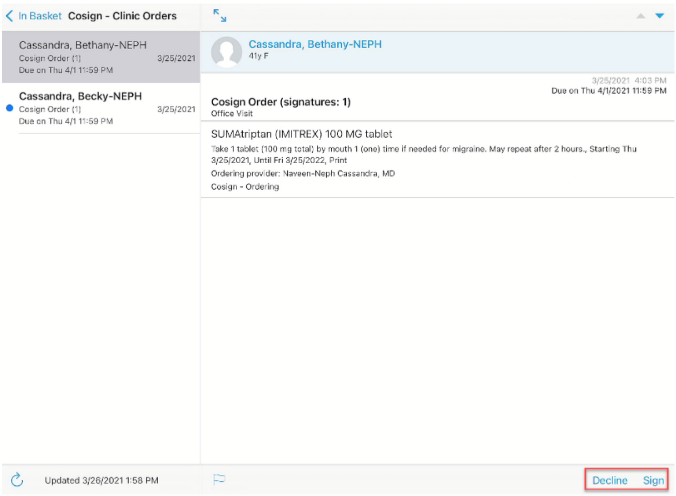
In an Rx Request message, tap a pending medication to review the order details. Tap **Rx Request** to return to the message



- ❖ If you need to review the full chart, tap the patient's name
- ❖ Tap **Edit** (Bottom right) to selectively approve and refuse pending medications or edit the order details.
- ❖ Tap a medication to edit the order details and, when you are finished, tap **Accept**
- ❖ Tap **Approve** to approve all pending medications and associate a Diagnosis. You can also manage other Providers in this screen
- ❖ Tap EDIT- then tap **Refuse** twice to refuse all pending medications. Select a reason for refusal for each medication **(Use Refill not appropriate)**and tap **Accept**

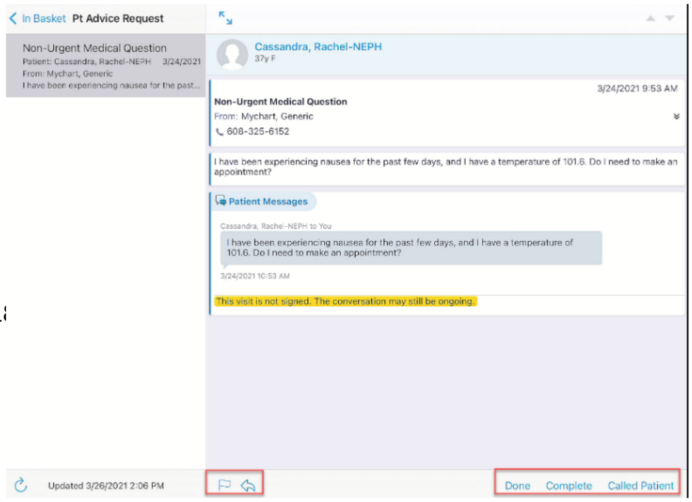
- ❖ To change pharmacies or split up prescriptions between multiple pharmacies, tap the blue Hyperlink in the Pharmacy box.
- ❖ Tap **Sign** to sign any approved refill requests. If you have addressed all the requests in the message, it is removed from your In Basket

Cosign Clinic Orders



- ❖ In a Cosign - Clinic Orders message, tap an order to review the order details
- ❖ If you need to review the full chart, tap the patient's name
- ❖ Act on the request to complete the message and remove it from your In Basket
- ❖ Tap **Sign** to cosign the orders.
- ❖ Tap **Decline** to decline to provide your cosignature. Add reason. Add comment if needed and accept
- ❖ Tap select to sign or decline individual orders in a single message

Patient Advice Requests

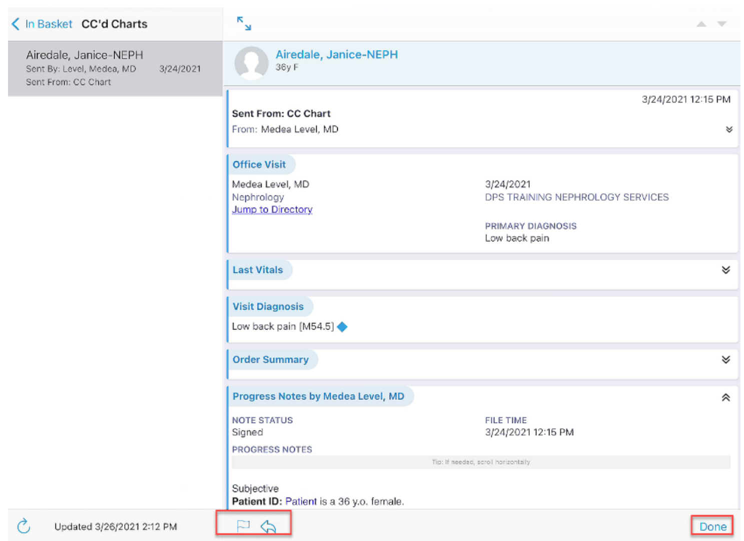


- ❖ In a Pt MedAdvc Rq message, tap **View** to see any attachments

- ❖ If you need to review the full chart, tap the patient's name
- ❖ Tap to reply to the patient by email or to forward to another provider
- ❖ Tap **Done or Complete** to remove the message from your In Basket
- ❖ Tap **Called Patient** to document a Pt Phone Call

CC'd Charts

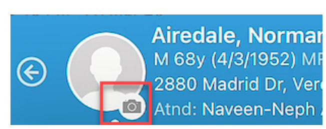
- ❖ Users can review CC'd Charts messages from the Haiku and Canto In Basket on both iOS and Android
- ❖ In the **CC'd Charts** folder, you can write a quick note, reply to the sender, or clear the message by marking it as done or deferred to a workstation



Capture and Review Media (Pictures)

Capture Clinical Images

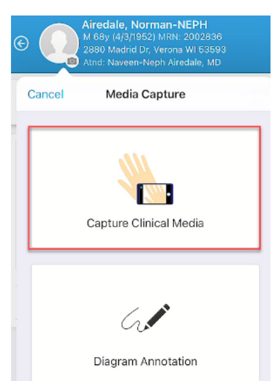
With your Patients chart open, select the **Chart** option down below, you will see the Media Actvity. This shows all documents and pictures that are scanned into the system.



Tap the Image icon (**under the Patient Profile Picture**) and then Capture Clinical Image and use the camera on your device to take a picture

Tap “**Capture Clinicial Media**” and take the picture

Tap “**Use Photo”** and enter a comment and document type.

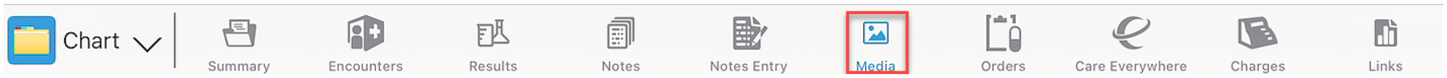


Then, select “**Save**” to save the media to the chart. You can also take more pictures from this screen by selecting “**Add More”.**

You can review media captures in the Media Manager or the Chart Review activity in Hyperspace.

Review Clinical Images And Media

Still in your Patients chart, tap **Media** again to referesh this folder



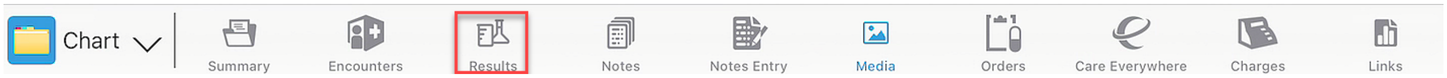
Scroll through the list of media files or, to find a specific media file, search using information such as:

- Document type
- The user who imported the file
- Keywords from the image's description
- The date the file was imported
- Tap a photo or document to see a full-screen view, where you can zoom in and out or pan around the image.

Inline images now appear in the Notes activity, as well as in In Basket messages and other blocks of text in Haiku and Canto. Tap an image to zoom in!

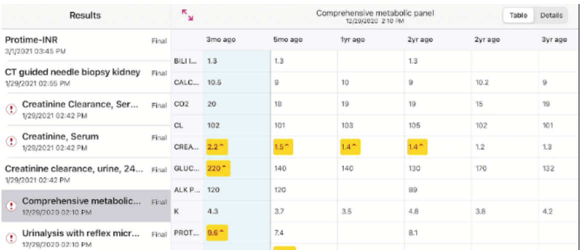
Review Results

In your Patients chart, tap **Results** to see a list of recent results for the patient. Tap a result to see details For lab tests, a table of lab results appears. Swipe left to see past values for the same lab.



For imaging or ECG results, a narrative report appears

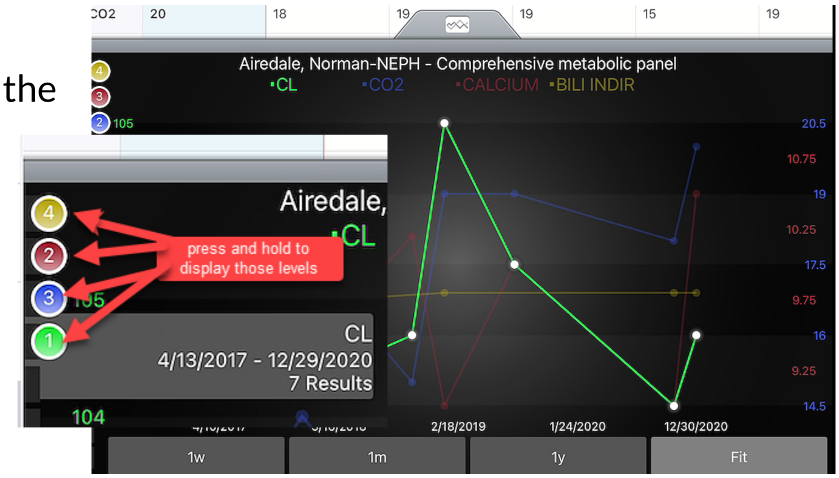
View a Graph Of Results



Review discrete lab results in a graph by **tapping or swiping up on the graph tab** at the bottom of the screen

Each result component appears on the graph in a unique color. To help you match the line color to a particular result component, a legend appears at the top of the graph. Focus On One Type Of Result

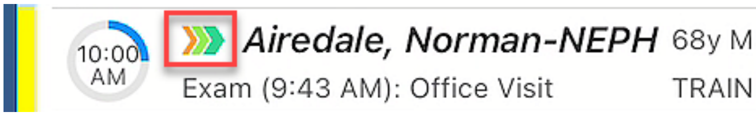
Tap the colored circle on the left side of the screen that corresponds to that component's color. The line that represents that component appears brighter than the other lines. Slide your finger up and down in order to choose the component you want to bring to the front of the graph



Office Visit Documentation (Notes)

Find your Patient on the schedule.

Notice the express lane symbol BEFORE the Patients name- this means that  the express lane is enabled for this visit. All Providers will see this in production



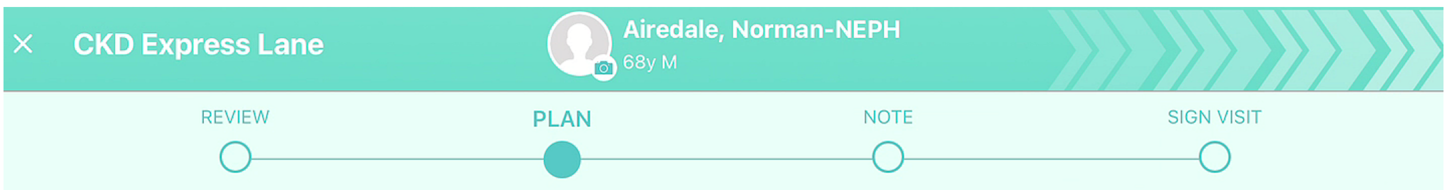
When you open your patient encounter, you're immediately taken to a page that allows you to use the express lane, "CKD Express Lane" (Bottom of screen)

Whether you utilize Express Lane functionality is a personal decision that you can decide

When selecting the Express Lane - The review section allows you to review allergies, problems, history meds and the patient's most current labs

Please note: you cannot make assessments or updates to these sections in Canto

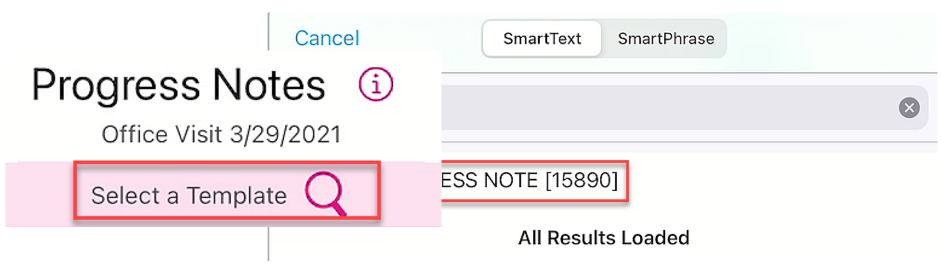
When selecting the Plan icon, you have the ability to indicate your visit diagnosis, place orders (meds/procedures), add your level of service and indicate a follow-up visit. This can be accomplished by selecting the section header. Once complete select the "Sign Plan" button in the lower right corner.



This button is to sign the PLAN…..NOT the visit! Once signed, you will be taken automatically to the Note section for Visit documentation

When selecting the note icon within the Express Lane, or taken there after sigining the Plan, you will be presented with the DPS standard templates.

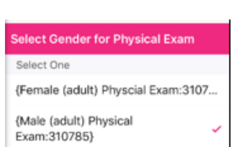
In order to complete your documentation, you will need to select the magnifying glass and search for the SmartText "Mobile Progress Note"

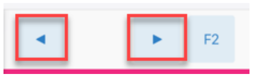


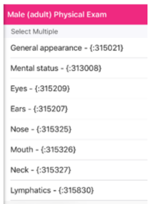
This Mobile Progress Note is a replica of the basic and detailed progress note with the exception of the personalized physical exam and review of system macros

The ROS and PE sections in the note are links that allows users to make assessments using a smartlist format, as a replacement for the +/- buttons in hyperspace

Arrows pointing to the left and right (F2) will navigate you to the next selection







After completing your PE, the next section that appears is your Plan and Quality Measure Documentation.

If the measure options are applicable for your patient, you will be presented with the *** in order to manually enter your additional follow up plan of care

When selecting the right arrow or F2 you will be navigated to the Recommendations section to manually enter your documentation

When prompted to sign your visit select on "Sign on Sign Visit" button in the upper right hand corner

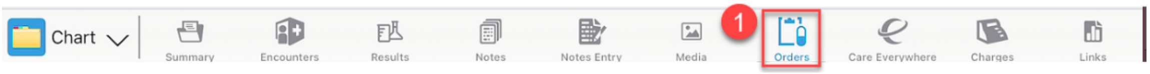
Medications and Orders

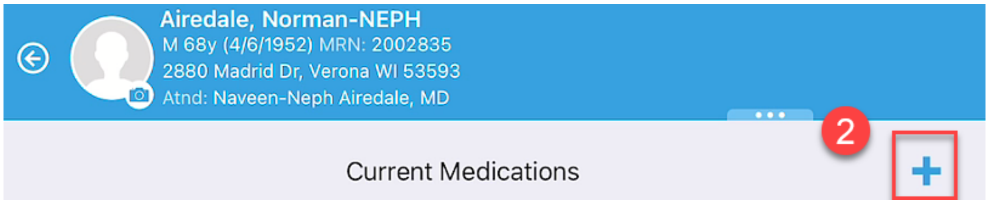
As a user, you have the ability to document patient reported medications as well as order new medications.

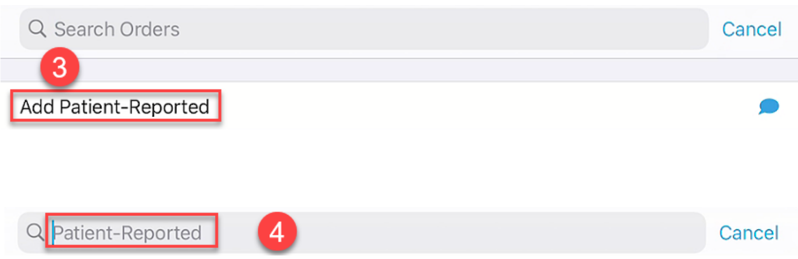
Document a patient reported medication

In your Patients chart, navigate to and select the "Orders" button down below

1. Select the orders icon
2. Tap the "+" to enter a new order
3. Tap "Add Patient-Reported"
4. Search for the medication you want to add
5. Enter the details as needed and tap "Add"







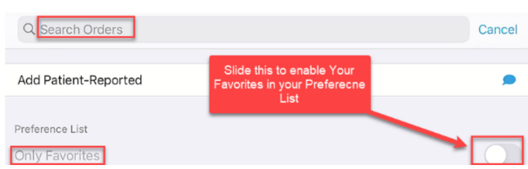
After you have selected **ADD,** you will be back in the entry screen to enter more Patient Reported Medications. If there is no more to report, Select the **DONE** button up at the top right.

Search for a Medication

The preference and search tabs allow you to look for medications that can be e-prescribed or called in.

When you are in the Patients chart:

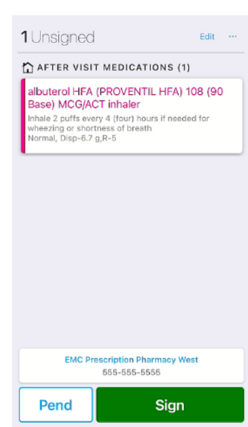
1. Tap **Orders**
2. Tap the **Blue Plus Sign** to Search for a Medication
3. Search for the medication that you want, or use your Preference List Favorites Only (If enabled)



Write a Prescription

On the active meds tab, review current prescriptions. Select the **Round About Arrow** to add the Medication to your orders, so that you can edit.

Double click the Medication that you want to order. Modify and enter the pertinent details. Select **ACCEPT** when finished.



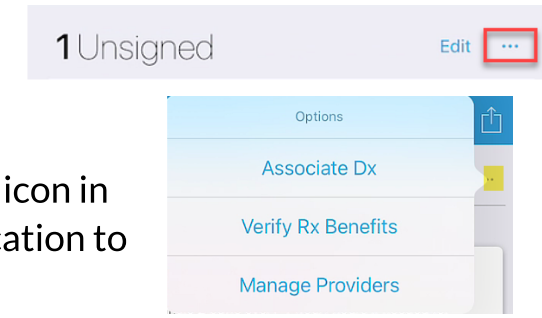
On the summary screen review the medication class and the pharmacy details.

Tap **Sign** and, if required, tap your password and tap done.

Write Orders

There are 2 main ways to begin entering orders:

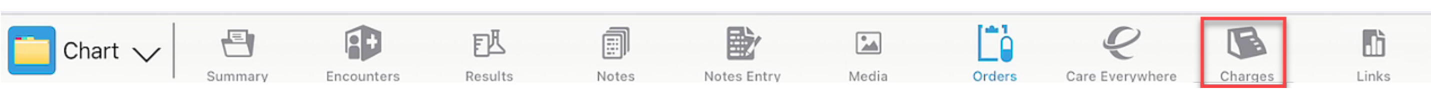
- Search for an order
- Tap the reorder icon for an existing medication



To verify the patients coverage or associate a DX tap the … icon in the top right corner. You will need to have a selected medication to associate a DX.

Documenting Charges

In a patient's chart, tap the Cash Register to open the Charge LOS Screen

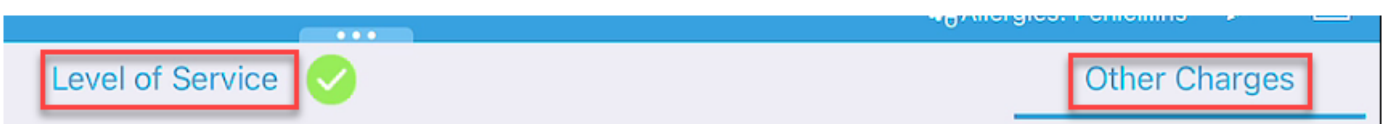


The default view for this screen is the **Level of Service** Tab. There is also a **Other Charges** tab to document other charges not covered under the LOS

Select the LOS for this visit and add any Modifiers as needed.

NOTE: You will not need to save this charge as it will save automatically.

You can go back, or add other charges if needed in the **Other Charges** tab



Hospital Rounding Charges

To document Hospital charges, first you need to identify the patient

1. Find the patient on your **My Patients** list or by searching for them in the **Search** bar at the top
    a. You can also create new Patients quickly
2. Open the Patient

Do **NOT** create an encounter if asked!

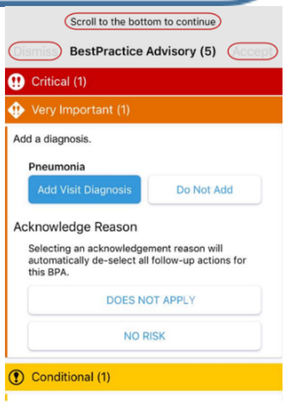
3. Go to charge capture and enter your charge(s)
4. File the charge
5. Close out of the patient

Once the charge is filed, if a PM practice, the charge will go directly through the interface to their PM system.

If a Non-PM practice, the charge will be located on their super bill, i.e.. Charge Router charges and Charge Rec reports.

BPA

Scroll to Accept or Dismiss a BPA



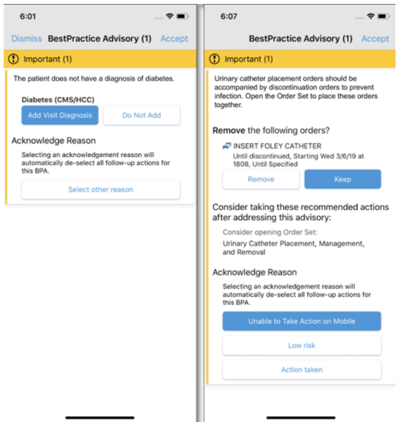
If a BPA has a scroll bar, you must scroll to the bottom of the BPA to enable the Accept or Dismiss button so you see all the information about the BPA to help you determine how to respond

Take More Actions from BestPractice Advisories – Haiku and Canto

Clinicians can take more actions in response to a BestPractice Advisory without going to a workstation.

In addition to the advisory follow-ups already available in Haiku, Canto and Rover, Clinicians see prompts for most manual follow-up actions, such as adding orders, adding FYI flags, and updating the patient's problem list.

The new manual follow-up actions are available only to iOS users.



From Haiku and Canto, clinicians can:

- ❖ Add single orders
- ❖ Remove selected orders
- ❖ Add diagnoses to the problem list

❖ Add visit diagnoses

Providers can complete follow-up actions to **add** the following items:

- ❖ FYI Flags
- ❖ Health Maintenance Modifers
- ❖ In Basket messages
- ❖ Questionnaires
- ❖ Questionnaire series
- ❖ Task templates
- ❖ Extensions
- ❖ Smart Data Elements

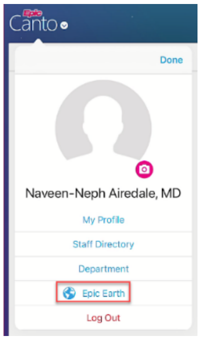
Epic Earth and “It’s Possible” videos

If you use Haiku or Canto, you can browse the “It's Possible” video library right from your mobile device!

On your mobile device, open the Haiku or Canto app

Tap:

- ❖ Canto- The arrow down icon at the end of the Canto Header
- ❖ Haiku- “More” at the bottom right



1. Tap the Epic Earth option
2. Browse and watch available videos, sorted by category

Troubleshooting

- You will use the **same CKD EHR login credentials** on mobile applications as if logging into Hyperspace on your desktop/laptop
- For additional self-education tools you will find both a Haiku for IOS and Android and Canto quick start guide on the Learning Home Dashboard.

- If you are having trouble, you should contact the Help Desk
- Before reaching out to the helpdesk, ensure you have the most updated version of the app and operating system installed on your device
- You should verify your login information is correct by logging into the system on a computer
- Help Desk Phone: 844-DVA-PHYS (1-844-382-7497)
- Help Desk email address: CKDEHRsupport@DaVita.com (Pre Go Live)

  PhysicianSupport@davita.com (Post Go Live)

Personalization User Guide

Use this guide as a companion during Personalization Labs and beyond.

Personalization is essential, as it allows you to configure the system to work for you. For example, you can change the way information appears, create custom note templates, and make it easier to find your commonly used orders.

The end goal is to allow you to spend less time in the system and more time working with your patients.

IMPORTANT: Do not place orders on test patients in PRD.

Reports will contain test patients throughout the roll out until all test patients our analysts created are deleted. Any test patients created via the PM interface will continue to show up on reports as Athena is not able to flag them as test patients or prevent them from being sent and created in Epic.

Reasons why placing orders cause issues:

1. Most orders are setup to auto-generate referrals, and these referrals are showing up on reports and in Slicer Dicer.
2. Although lab orders don't generate referrals, they can be transmitted to LabCorp or Quest if you place them on a test patient and select a resulting agency.
3. Similarly, orders that generate referrals could in appropriately automatically send transitions of care if the referred to provider has a direct address.

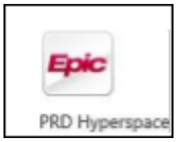
During Personalization Lab, start with the Pre-Live sections. Focus first on:

- NoteWriter macros for ROS and PE as needed
- SmartPhrases with embedded SmartLinks and SmartLists as needed
- Adding speed buttons for common notes

- Adding your top 20 orders to your preference list and organizing it as needed
- Creating Lab Panels as needed
- Customizing Express Lanes as needed
- Creating QuickActions in the In Basket
- Sharing with your practice!

Finding Your Personalization Lab Patient in Production

1. Go to https://dva-portal.et1087.epichosted.com/Citrix/EpicWeb/
2. Log in with your DaVita Active Directory username and password.
3. Authenticate DUO when prompted.
4. Select the PRD Hyperspace [Your Time Zone] icon.



5. Enter your department in the department field if not already there from the last time you logged into production.
6. Accept the Message of the Day.
7. Navigate to the Epic button> Select Patient Care> Select Encounter> Search for your patient> Select, Select> Select New> Select Type Documentation> Select Accept> Select Accept

The below are the Test Patients available for all practice locations and users

ZZZPERSONALIZATION, ONE - <E1367036>	ZZZPERSONALIZATION, ELEVEN - <E1367046>
ZZZPERSONALIZATION, TWO - <E1367037>	ZZZPERSONALIZATION, TWELVE - <E1367047>
ZZZPERSONALIZATION, THREE - <E1367038>	ZZZPERSONALIZATION, THIRTEEN - <E1367048>
ZZZPERSONALIZATION, FOUR - <E1367039>	ZZZPERSONALIZATION, FOURTEEN - <E1367049>
ZZZPERSONALIZATION, FIVE - <E1367040>	ZZZPERSONALIZATION, FIFTEEN - <E1367050>
ZZZPERSONALIZATION, SIX - <E1367041>	ZZZPERSONALIZATION, SIXTEEN - <E1367051>
ZZZPERSONALIZATION, SEVEN - <E1367042>	ZZZPERSONALIZATION, SEVENTEEN - <E1367052>
ZZZPERSONALIZATION, EIGHT - <E1367043>	ZZZPERSONALIZATION, EIGHTEEN - <E1367053>

ZZZPERSONALIZATION, NINE - <E1367044>	ZZZPERSONALIZATION, NINETEEN - <E1367054>
ZZZPERSONALIZATION, TEN - <E1367045>	ZZZPERSONALIZATION, TWENTY - <E1367055>

Create a Personal Note Template with a SmartPhrase

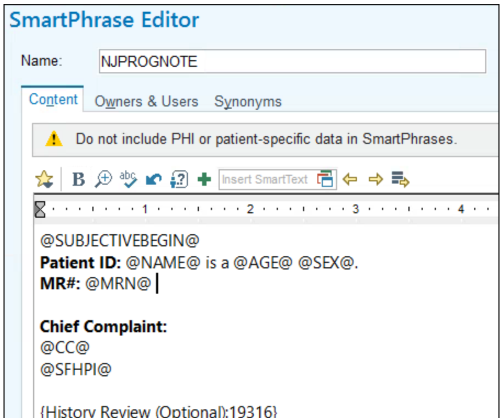
You can customize any of the note templates for your specialty to better fit your needs. For example, you might want to:

- Include relevant lab data in the note.
- Include standard review of system verbiage.

After you make changes to a note template, save it as a SmartPhrase, so you can quickly pull your personalized template into future notes.

1. Refer to the list of notes in the **Existing Tools to Personalize** section.
2. Click **Personalize** on the CKD EHR main toolbar, and then select **My SmartPhrases** to enter SmartPhrase Editor.
3. Click New to create a new SmartPhrase and give it a short, intuitive name.
   - You might want to begin your phrases with your initials. For example, if your initials were "N.J.", you might name the SmartPhrase "NJPROGNOTE."
4. In the **Insert SmartText** field, enter the name of the note template (i.e. **DPS Progress Note**)

5. Click **Accept**
6. Adjust the details of the note template as needed.
   - You can pull SmartLinks into your note template by typing a period followed by the name of the SmartLink, with no spaces. The SmartLink appears in your template surrounded by @ symbols.

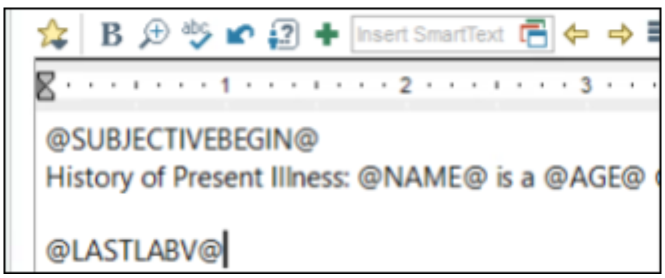


- You have the option to add a brief summary of your SmartPhrase in the Short Description field.
- You can also add a brief summary of your SmartPhrase in the Short Description field. When you search for your SmartPhrase, this appears next to the name.

7. In the future, to use your new SmartPhrase, type a period followed by the SmartPhrase name, and then press the spacebar or '**Enter**'.

Add a SmartLink to Your SmartPhrase to Pull in Patient-Specific Information

1. In the location where you want the SmartLink to appear, enter a period followed by the first few letters of the SmartLink's name. A list of matching SmartLinks appears.
2. Double-click a SmartLink to insert it. The SmartLink appears in your SmartPhrase between @ symbols, such as @LASTLABV@.
3. Click **Accept and Stay**. The next time you use this SmartPhrase, patient-specific information appears where you added the SmartLink.



Add Synonyms to Quickly Find Your SmartPhrases

When writing a note, you can pull in your SmartPhrase with its name or a synonym.

1. Open one of your SmartPhrases and go to the Synonyms tab.
2. In the Synonyms field, enter any other names you might use to search for this SmartPhrase. For example, you might name a SmartPhrase ABDOMINALPAIN and include a synonym of STOMACHPAIN.
3. Click Accept.

Add a SmartList to Your SmartPhrase

Use SmartLists to select from a list of common choices when writing your note.

1. Open one of your SmartPhrases. In the **Insert SmartList** field on the right, enter the first few letters of the SmartList (i.e. **Prior Hospitalization)** and press **Enter**.
2. Double-click the SmartList you want.
3. You may also include the label by selecting the checkbox
4. Apply the proper connection logic
5. You may also edit the existing SmartList to include additional choices
6. The SmartList appears in your SmartPhrase in braces.

BACKPOCKET

See a list of available SmartLists by clicking **Personalize** and selecting '**SmartList Manager'**.

Add Clickable Check Boxes in the SmartPhrase Editor

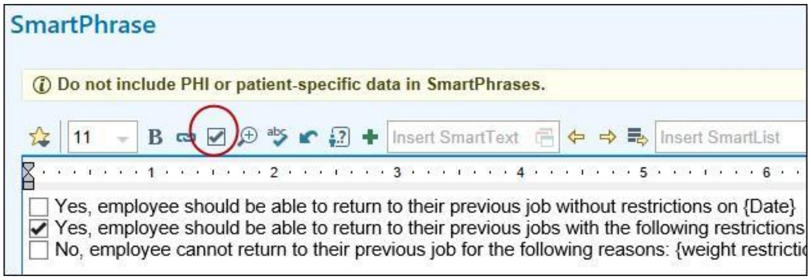
Users can add clickable check boxes to the SmartPhrases created. Users can personalize their toolbar to add the Insert Checkbox option and then use it to add a check box to a SmartPhrase. Then left-click to check or uncheck the box.

1. Navigate to the Star Icon
2. Select All Other Tools
3. Insert Checkbox

OR to save this option in your toolbar

1. Navigate to the Star Icon
2. Select Modify Toolbar
3. In the left column scroll down and select Insert Checkbox
4. Select Add in the center to move it to the right side
5. Select Accept

After a check box is added, users can left-click the box to check or uncheck it.



Users who prefer keystrokes over clicks can select a check box using the right or left arrow keys and then press Enter or the spacebar to check or uncheck the box.

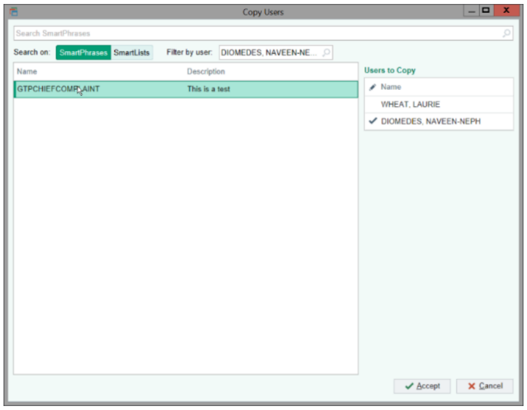
Share SmartPhrases

In the SmartPhrase Editor, go to the '**Sharing'** section and enter the names of any colleagues who should have access to your phrase.

- **Users-** can use your SmartPhrase, but not modify it.
- **By checking the box "Can Edit"** allows that user to also be an owner who can modify/edit the SmartPhrase.
- You can add as many colleagues as you would like.

Copy User will allow you to copy users or owners from a previous SmartPhrase

- Create new SmartPhrase
- Select '**copy user'** button
- Select the users
- Select '**Accept**'



Set up Quick Formatting Options for Notes

You can set up formatting options for your notes, such as underlining text or making it larger, so that these options are always available on a speed bar for all notes, letters, or patient instructions you write in the future.

1. To modify the buttons on your SmartTools toolbar, click and select **Personalize Toolbar**.
2. In the Personalize Toolbar window, add or remove buttons based on your preferences, and

then click
Accept.

- Some popular examples include **Font Size** for readers with poor eyesight, **Italic**, and **Underline**.

Create or Edit a User SmartList

You can create and edit your own User SmartLists or share your SmartLists with other users.

1. Use Chart Search to open the '**SmartList Editor'** and select '**SmartList'** OR Navigate to '**Personalize**' and select '**SmartList'**
2. Next select **'Create SmartList'** radial button
3. If you're able to create and edit System SmartLists, you see a **Type** prompt. Select **User**.
4. Enter a name for the SmartList
5. Click '**Accept'** to create the SmartList and open the SmartList Editor.
6. Enter your choices you would want to be available in your SmartList
7. Under selection options choose multiple or single
8. You may elect to share with others
9. Select '**Accept**'

Define the User SmartList Options

1. In the **Choice** table, enter the choices in the SmartList (A).
2. Select the check box next to an option to mark it as the default option.
3. To add another SmartTool (SmartText, SmartList, or SmartLink) to a choice in the SmartList, click the ⭐ and select one of the options (B):
   - **Insert SmartText**
   - **Insert SmartList**
   - **Insert SmartLink**

BACKPOCKET

These fields are SmartTool-enabled, meaning you can use dot phrases to enter SmartLists, or use keyboard shortcuts to open the lookup windows.

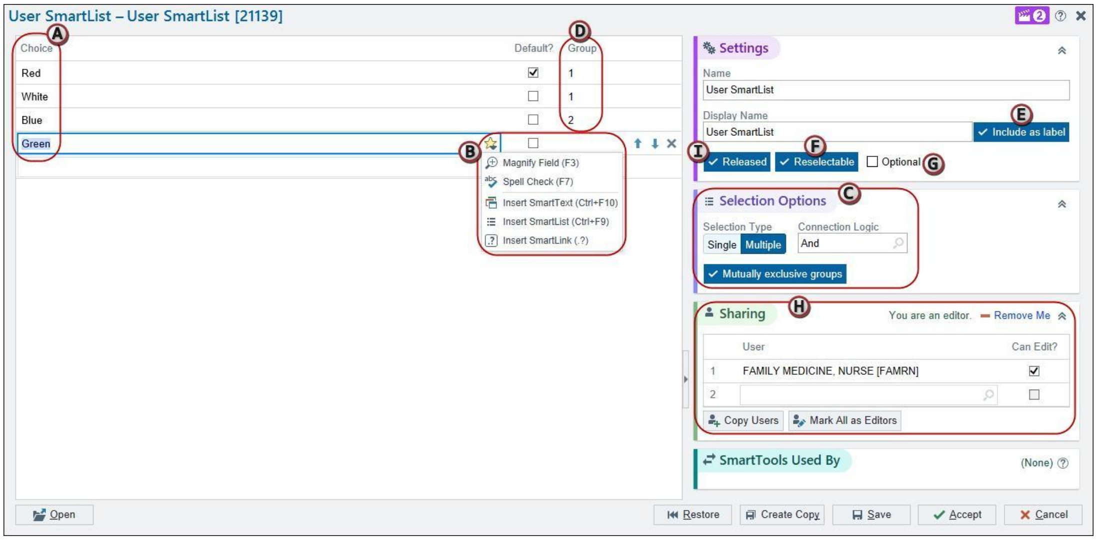
4. If you want to be able to select more than one option in the SmartList, select the **Multiple Select** option (C).
5. In the **Connection Logic** section, specify how the selections appear in the SmartLink's generated text. For example, And logic would produce "Red, White, Blue, and Green" if all options in this SmartList were selected. Hover over each option for a description.
6. If the SmartList includes choices that shouldn't be selected together (for example, "Red and White" can be selected together but "Red and Blue" cannot

    - Select the **Mutually exclusive groups** button.
    - In the **Group** column (D), enter the group to which the selection belongs. If a selection has a group specified, it can only be selected by itself, with another option from the same group, or with an option that has a blank group name.

7. If you want to show a label in the generated text (for example, "Color: Red and White"), enter Yes in the **Label?** field (E) and enter the display text in the **Label text** field.
8. The **Reselectable** button (F) is selected by default, which allows you to re-select your options when using the SmartList. Unselect this checkbox if you do not want to be able to re-select options.
9. To make the SmartList optional, meaning that you don't have to complete it before saving the text that contains it, select the **Optional?** check box (G).

10. In the **Sharing** section (H), list the users who can use the SmartList in the **User** column.
11. Select the **Can Edit?** check box to allow a user to modify your SmartList.

12. When you're done editing your SmartList, click ✓ **Accept** to save your SmartList and exit the SmartList Editor.



Copy Users from a SmartPhrase or SmartList

If a SmartPhrase or SmartList has a list of users that you want to copy:

1. Click **Copy Users**.
2. Toggle the **Search on** option to search for a SmartList or a SmartPhrase.
3. Select a SmartPhrase or SmartList. Its users appear in the **Users to Copy** section. Users who can edit the selected SmartPhrase or SmartList have a check mark icon next to their name.

Create a Macro from Scratch

A NoteWriter macro can help you document a typical exam efficiently.

A macro is a set of signs, symptoms, and pertinent negatives that you commonly record during an ROS or physical exam.

For example, during an ROS, you can document the patient's symptoms and then apply a macro to note all pertinent negatives. Anything you document before applying the macro is preserved, and you can also make changes after applying it.

VIDEO REFERENCE

Epic "**It's Possible**" Video- NoteWriter Macros (POSS020)

Follow these steps to create a macro at any time.

1. Clcik '**Personalize**' on your Hyperspace Toolbar and then select '**Macro Manager (Note Writer**)'
2. In the Macro Selection window, enter a name for your macro (i.e. **Review of Systems**

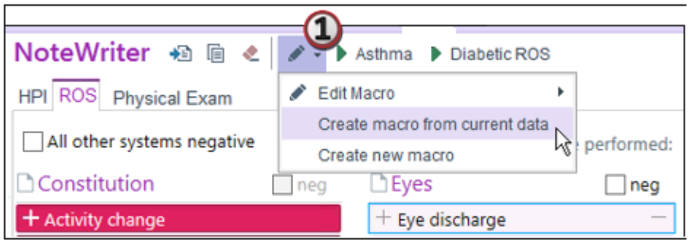
By Age or **DPS Physical Exam by Age;** if you are unable to find them uncheck the **Hide SmartBlocks I don't use** box)

3. Click **Create a SmartBlock Macro**
4. In the **SmartBlock** field, enter a name for the macro. Enter any necessary age and sex restrictions and click **Accept**.
   - For example, you can make the macro be available only when you're doing an ROS for females age 13 and older. These restrictions allow you to create different macros for female or male.
5. In the SmartBlock Macro Editor, select the signs and symptoms you commonly review during an exam or the prep steps you frequently perform before a procedure.
6. Select the **Active** check box and click ✔ **Accept**. You may also choose to set a MACRO as your primary (This would be for the one you would use most- it would put the MACRO in the primary position). Your macro is now available for use.
7. To apply this macro at a future visit, open the NoteWriter tab for the type of macro you created and click the click the button that appears next to your new macro at the top of the NoteWriter.

Create a ROS and PE Macro On The Fly

Follow these steps to create a macro on the fly, based on the documentation you've recorded for the current patient.

1. After making your selections on the **ROS** or **Physical Exam** tab of the NoteWriter, click to the right of the button and select '**Create macro from current data**.'



2. In the Macro Selection window, enter a name for your macro and click **Accept**.
3. Note any age and sex restrictions that appear. For example, the macro you create

might apply only when you're doing a review of systems for females age 13 and older. These restrictions allow you to create different macros for female, male, and pediatric patients.

4. In the SmartBlock Macro Editor, select any other items that you commonly record. Then select the **Active** check box and click ✓ **Accept**. Your macro is now available for use.
   - Note that any additional changes you make in the editor are not automatically applied to your note for the current patient.
5. To apply this macro at a future visit, click the ▶ button that appears next to your new macro at the top of the NoteWriter.

BACKPOCKET

If you have multiple macros for a tab, select the '**Set as primary macro'** check box in the editor to make your most commonly used macro appear first in the list.

Create a ROS and PE Macro at Your Leisure

Follow these steps to create a macro at any time.

1. In your note text, right-click the orange-highlighted review of systems, physical exam, or procedure text, depending on the type of macro you want to create. Note the SmartBlock name in parentheses, which you'll need in step 4.
2. Use Chart Search to open SmartBlock Macro.
3. Click Create New Macro.
4. In the Create New Macro window, enter a name for your macro in the Macro Caption field.
5. In the NoteWriter Tab field, enter the name you noted in step 1. Enter any necessary age and sex restrictions and click Accept.
   - For example, you can make the macro be available only when you're doing an ROS for females age 13 and older. These restrictions allow you to create different macros for female, male, and pediatric patients.
6. In the SmartBlock Macro Editor, select the signs and symptoms you commonly review during an exam or the prep steps you frequently perform before a procedure, for example.

7. If it isn't already, select the Released check box and click Accept. Your macro is now available for use.
8. To apply this macro at a future visit, open the NoteWriter tab for the type of macro you created and click the click the button that appears next to your new macro at the top of the NoteWriter.

Organize, Edit or Delete Your Note Macros

In the Macro Manager, you can organize how your macros appear in the NoteWriter so that the ones you use most often are easily accessible. You can also edit, hide, and delete macros as needed.

1. In the NoteWriter, click . The Macro Manager opens.
2. In the **Select a SmartBlock** field, select the SmartBlock for which you want to create, edit, or organize macros, such as Review of Systems by Age.
   - The SmartBlock you were working with when you launched the Macro Manager appears in this field automatically. Your macros for this Smart Block appear in the table below.
   - If you want to look up macros for all types of SmartBlocks, clear the **Hide SmartBlocks I don't use** check box.
3. Make changes to the available macros and click **Accept** to save your changes.
   - **Organize**: To rearrange macros so that the most common ones are listed first on the NoteWriter toolbar, drag and drop the macros until they're in your preferred order.
   - **Edit**: To modify the selections in a macro, click the pencil icon and make your changes.
   - **Hide**: If shared macros created by other users appear in your list and you don't use them, select the **Hide** check box for those macros.
   - **Delete**: If you own a macro and no longer want to use it, click X next to that macro.
   - **Undelete**: Deleted macros appear in the bottom pane. If you want to use a deleted macro again, click the blue back arrow to reactivate it.

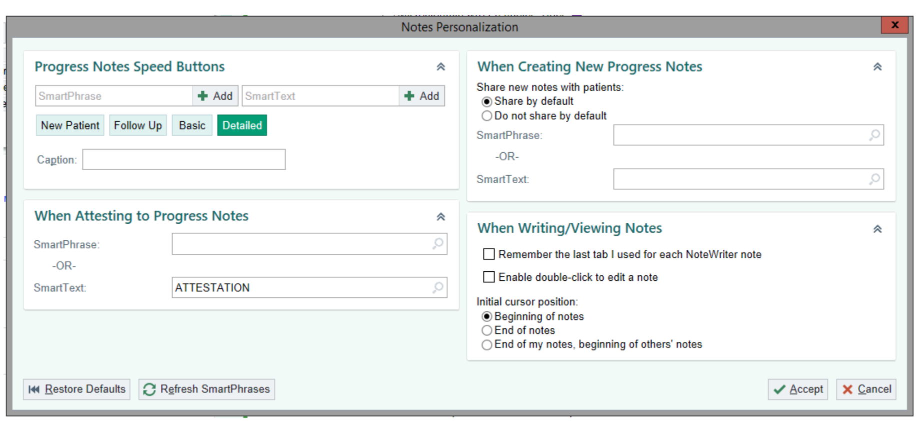
Jump Start Routine Notes with Speed Buttons

Add personalized buttons to the Notes sidebar or activity so that your most commonly used note templates are available in one click.

You can create a button that starts a new note with the SmartPhrase or SmartText of your choice.

VIDEO REFERENCE	
	Epic "**It's Possible**" Video- Personalizing Notes (POSS019)

1. Click the wrench icon in the upper-right corner of the Notes sidebar activity, or navigator section.
2. In the '**My Notes'** Settings window, under Progress Notes Speed Buttons, click ➕ to add a new button from either a Smartphrase or SmartText.
   a. In the **Caption** field, enter the name that you want to appear on the button.
3. Click ✔ **Accept.** The button appears at the top of your Notes section.



BACKPOCKET

You can also click to specify other note-writing preferences. For example, you can specify a more general SmartText or SmartPhrase that's automatically pulled in whenever you click **Create Note**.

Create and Personalize Your Express Lane

While there is a system built Express Lane available out of the box, as a user you can create personalized versions to personalize the settings of common orders you place.

1. Click '**Personalize'** on the Hyperspace Toolbar, and then select '**User SmartSets'**.
2. In the SmartSets field search for **DPS** and click Enter.
3. Check the option you want to personalize (i.e. **CKD Express Lane**)
4. Click '**Create New Version'.**
5. Enter a name for your Express Lane
6. Click the order details link to customize details such as the dose, frequency, and rate.
7. Select or clear the check box next to an order to customize which orders are selected automatically.
8. Click **Accept**.

REMINDER

To edit or delete a User SmartSet, look it up in the User SmartSets activity and select **'Edit This Version'**.

You can also have different Express Lanes for variants of the same problem.

You can do this without opening a specific patient's chart.

1. Click '**Personalize'** on HyperspaceToolbar and then select '**User SmartSets'**.
2. Click the drop down arrow to expand **'My User Versions'**, select the Express Lane you want to create a new version of, and click '**Create New Version'**.

3. Enter a name for your Express Lane and edit the details as needed.
4. Click ‘**Accept’**. When you open up a patient’s chart in the future with the corresponding Express Lane, a window will appear prompting you to choose the version you want to use

Creating a Custom ROS and PE

Follow these steps to create a macro at any time.

1. In your note text, right-click the orange-highlighted review of systems, physical exam, or procedure text, depending on the type of macro you want to create. Note the SmartBlock name in parentheses, which you'll need in step 4.
2. Use Chart Search to open SmartBlock Macro.
3. Click Create New Macro.
4. In the Create New Macro window, enter a name for your macro in the Macro Caption field.
5. In the NoteWriter Tab field, enter the name you noted in step 1. Enter any necessary age and sex restrictions and click Accept. •For example, you can make the macro be available only when you're doing an ROS for females age 13 and older. These restrictions allow you to create different macros for female, male, and pediatric patients.

6. In the SmartBlock Macro Editor, select the signs and symptoms you commonly review during an exam or the prep steps you frequently perform before a procedure, for example.
7. If it isn't already, select the Released check box and click Accept. Your macro is now available for use.
8. To apply this macro at a future visit, open the NoteWriter tab for the type of macro you created and click the click the button that appears next to your new macro at the top of the NoteWriter.

Customizing and Creating Your Preference List

Organizing your preference list effectively can help you place orders more quickly. You can create sections to group orders you often place at the same time, add the orders you write most frequently with the exact details you need and edit the display names so the orders are easier to find.

After your preference list is set up, you can browse through the orders and select the ones you need for the patient.

VIDEO REFERENCE
Epic “**It’s Possible**” Video- User Preference Lists (POSS023), Preference List Organization (POSS023) and Preference List Composer (POSS062)

Create Preference List Sections

For efficient preference list setup, first create the sections that are most useful to you, such as disease or body system sections. Then, when you place a commonly used order, save it as a favorite and add it to the correct section in your preference list.

1. Click ‘**Personalize’** on the Hyperspace Toolbar, and then select ‘**Preference List Composer’**.
2. In the list that appears, double-click your outpatient orders preference list. The list is called "<your name> ORDERS OP".

    - It's important to choose the orders preference list because when you place an order and save it as a favorite, the order is automatically added to this list.
    - You can also check the Count column to see how many orders are in your preference list without opening it

3. Click ‘**New Section’.**

- Create sections that are appropriate for your specialty and that group orders you often place at the same time.
- Enter a display name that makes sense to you.
- Indicate whether you want orders in this section to appear alphabetically when browsing the list.

4. To add a subsection, select the section it should appear under and click ‘**New Subsection’.**

BACKPOCKET
You can add both medications and procedures (i.e. labs, imaging, referral) to the order preference list!

- Add subsections that group orders appropriately for your specialty. For example, you might add subsections for meds, labs, and imaging to various disease sections.
- Reorganize the sections and subsections in your preference list by dragging and dropping them or by using the up and down buttons in the bottom left.

5. Click **Close** when you're finished adding sections.

Add Orders to Your Preference List

1. Look up an order and edit the details as usual.
2. Post-live, when signing the order, hover over it and click ☆ to add it to your preference list.
3. In the ‘**Display Name’** field, enter an easy-to-remember name for the order. The next time you need to place this order, you can search for your saved order using this name.
4. In the ‘**Section’** field, enter the section of your preference list in which you want this order to appear. Or, click ‘**New Section’** to add another section to your list.
   - If you don't specify a section, the order will appear in the **‘My Favorites’** section.
5. Enter any other details you want to use when you place this order in the future, such as instructions or answers to questions. These details appear only for you, and you can always update them later.
6. Click ‘**Accept’** and indicate whether you want to use the details you entered in step 5

for the current patient

Edit Your Preference List

After you add an order to your preference list, you might want to move it to a different section, or you might change your mind about the details you specified.

In the Preference List Composer, you can edit order details and remove orders that you no longer use.

1. Use Chart Search to open the **Preference List Composer**, or use the '**Personalize**' button up top in your Hyperspace Toolbar
2. In the list that appears, double-click your outpatient orders preference list. The list is called "<your name> ORDERS OP."
3. Select the section or subsection that contains the order you want to edit.
   - To move an order to a different section, click the order and drag and drop it into another section.
   - To modify order details, such as frequency or display name, double-click the order's name.
   - To change the name of a section or subsection, click **Properties**.
4. When you're finished making changes, click **X.**

BACKPOCKET

Drag and Drop orders into different sections OR double click an order to change the details or display name

Copy A Preference List from Other Providers

To save time creating a preference list, you can copy the lists that your colleagues have created for certain types of orders. Sharing and copying preference lists between clinicians also helps spread experience and expertise throughout your organization.

VIDEO REFERENCE
Epic “**It’s Possible**” Video- Preference List Sharing (POSS053)

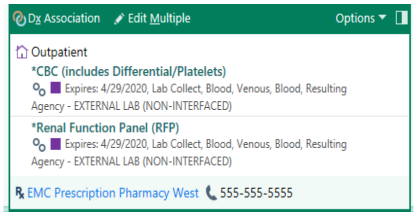
1. Use Chart Search to open the **Preference List Composer**.
2. At the bottom of the screen, click **Copy User**.
3. In the **From user** field, enter the name of the user whose preference list you want to copy.
4. Verify that your name appears in the **To user** field.
5. Select a copy option.
   - If you want to add the other user's entire list to your existing list, select **Merge.** This might result in duplicate orders.
   - To completely replace your list with the other user's list, select **Replace**.
6. Select the check boxes for the types of lists you want to copy.
   - The columns under your name and your colleague's name show how many orders are on each of your preference lists.
   - To see the orders on your colleague's list, double-click the number of items on his list.

7. Click **Copy.**

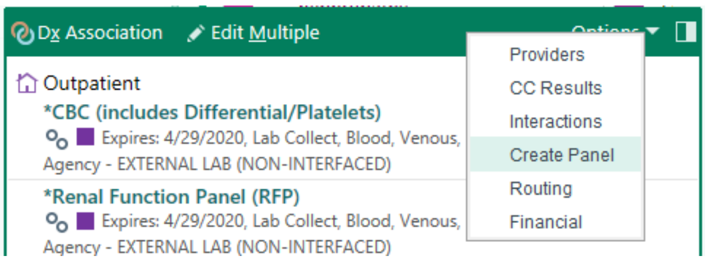
- A confirmation window appears.
- Edits you make in the new list do not affect your colleague's list

Create Lab Panels

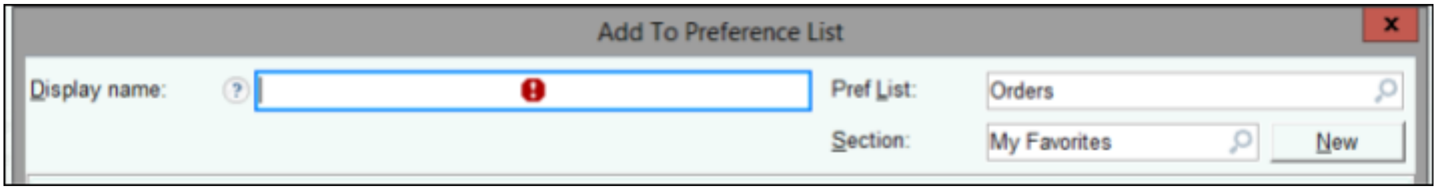
1. Navigate to the Visit Taskbar and click '**Add Orders'**
2. Select the labs you would like to include in your panel



3. Once they appear in the shopping cart navigate to the '**Options**' dropdown and select '**Create Panel'**

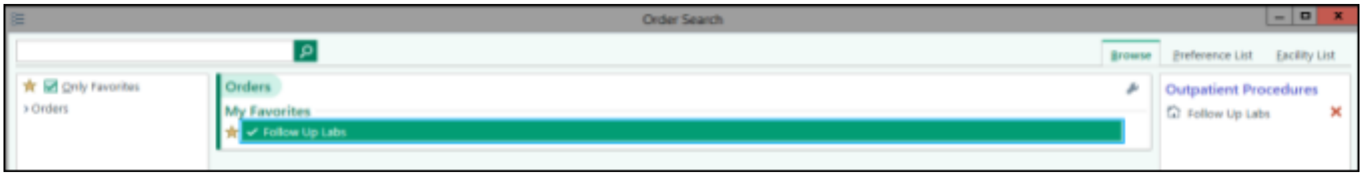


4. The '**Add to Preference List'** screen will appear where you will see the options to name your panel and add to your configured preference list.



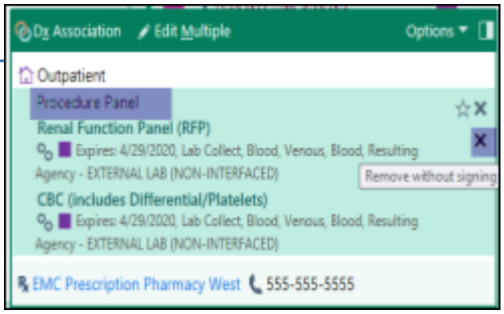
- Once created and added to your preferences, you may use this option to select from in the future.

5. Navigate to your preference list -> select the location your stored your panel-> select panel.



6. Once selected labs will appear in the shopping cart as a panel.
    - To remove a specific lab based on your patient, you may use the **X** to delete.

QuickActions Common Tasks



If you receive In Basket messages that require routine follow-up, you can quickly complete that follow-up using a QuickAction.

QuickActions are available for routine letters, result notes, QuickNotes, MyChart messages, and more.

- For example, in your '**Results**' folder, you might have a QuickAction called '**Abnormal**' that creates a result note using your standard text, routes it to your preferred recipients, and marks the message as '**Done**' in a single click.

Write and Route Result Note QuickActions

If you receive Results messages that require routine follow-up, you can write and route your standard result note in a few clicks using a QuickAction. For example, you can create a QuickAction that creates a note asking a nurse to call the patient, sends the note to the nurse pool, and removes the associated Results message from your In Basket.

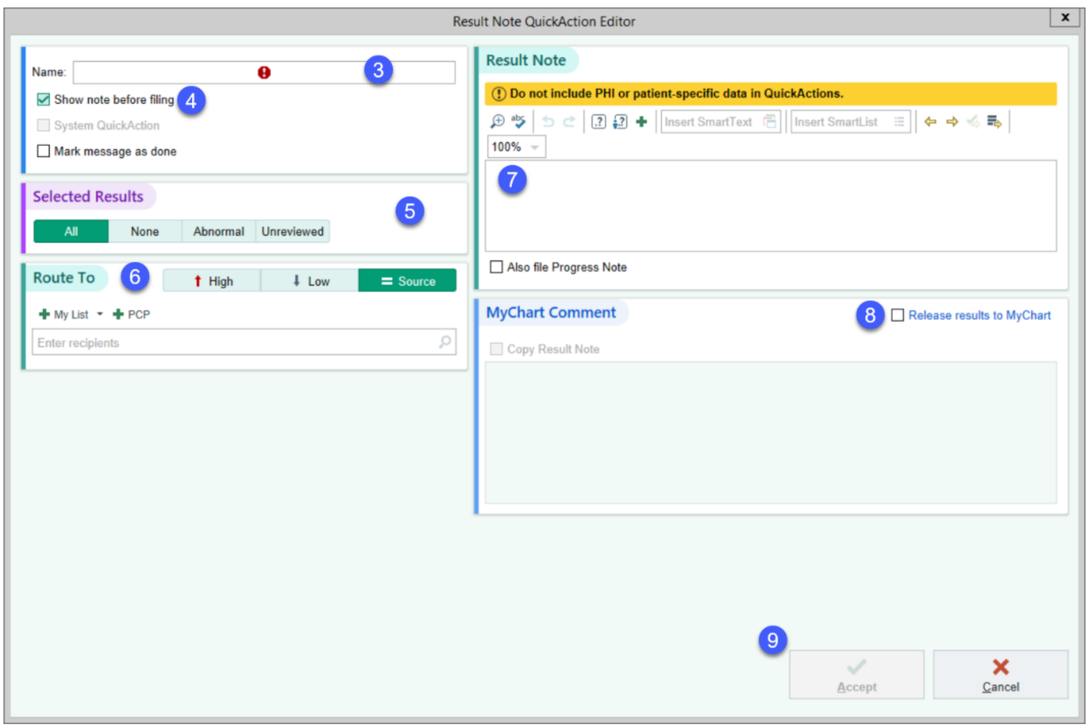
1. Look on the In Basket toolbar and click the drop down arrow to open the '**Manage QuickActions'** button
2. Select '**Result Note'**
3. Enter a brief name for your QuickAction, such as "Normal - Call", in the '**Name'** field.
4. Configure this QuickAction to meet your needs:
    - To have a chance to edit the result note before it's filed, select the '**Show note before filing'** check box.
5. Specify which results should be attached to your note. In the '**Selected Results'** section, choose:
    - **'All'** to attach your notes to all results in a message.
    - '**None**' if you don't want to attach your note to any results. You can choose results on

the fly if you selected the '**Show note before filing'** check box in step 4.

This option is not recommended, because it's faster to locate your note when it's attached to a result.

- **'Abnormal results'** to attach your note to only the abnormal results in a message.
- **'Unreviewed'** to attach unreviewed results

6. To send your note to a colleague, select the '**Route note to'** check box and specify the recipients for your Result Note message. For example, send it to the patient's PCP or to other recipients, like a pool of nurses.
7. Enter your note in the '**Result Note'** field on the right. Any SmartLinks you use are personalized for the patient when you use this QuickAction.
8. To release the result to the patient, select the '**Release to MyChart'** check box. You can write a comment for the patient in the '**MyChart Comment'** field.
9. When you're finished, click '**Accept'**. A new QuickAction button appears on the report toolbar in all of your Results messages.

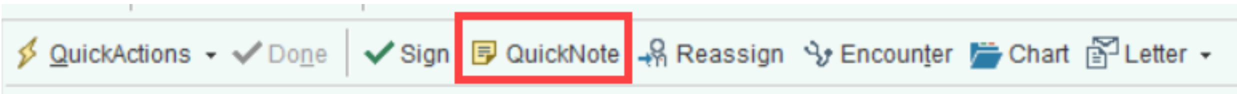


Create QuickActions to Write Routine QuickNotes

Use QuickActions to write and route standard QuickNotes in a few clicks. For example, if you often respond to cosign messages by writing an attestation note, you can create a QuickAction that files the note to the related visit, sends a response to the resident, and removes the associated message from your In Basket.

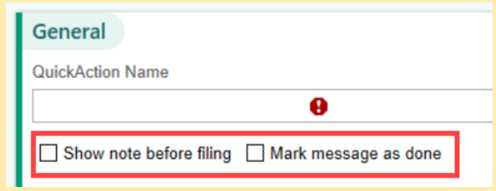
VIDEO REFERENCE	
	Epic '**It's Possible'** Video- QuickActions: QuickNotes **(POSS005)**

1. Open a message that includes the '**QuickNote**' button, <u>such as a Cosign - Chart</u> message. Click '**QuickNote**' on the folder toolbar

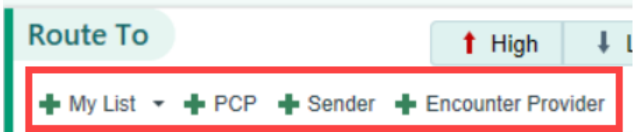


2. Click '**Save as QuickAction'** at the bottom of the QuickNote window to open the '**QuickAction**' Editor
3. Enter a brief name for your QuickAction, such as "<u>Attest</u>", in the Button name field

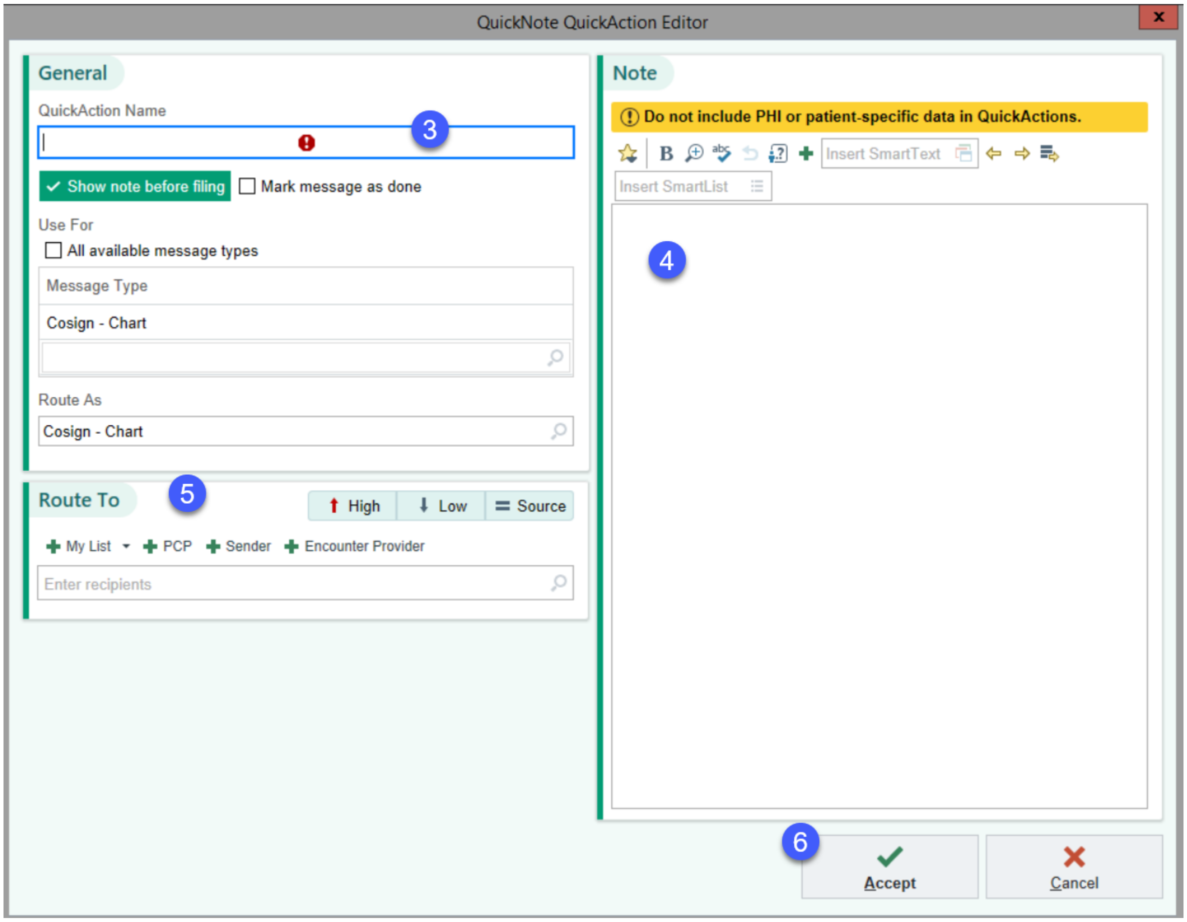
BACKPOCKET	
	You also have the option to set this QuickAction to complete some steps automatically for you! By selecting the '**Show note before filing**' or the '**Mark message as done**' boxes, you can have the system automatically do those tasks for you. Less clicks for the win!



4. Enter your message in the text box. Any SmartLinks will be personalized when you use this QuickAction
5. To send your note to a colleague, select a recipient from the '**Route To'** list or enter her name in the '**Recipient**' field
   For example, send it to the patient's PCP or reply to whomever sent you the In Basket message

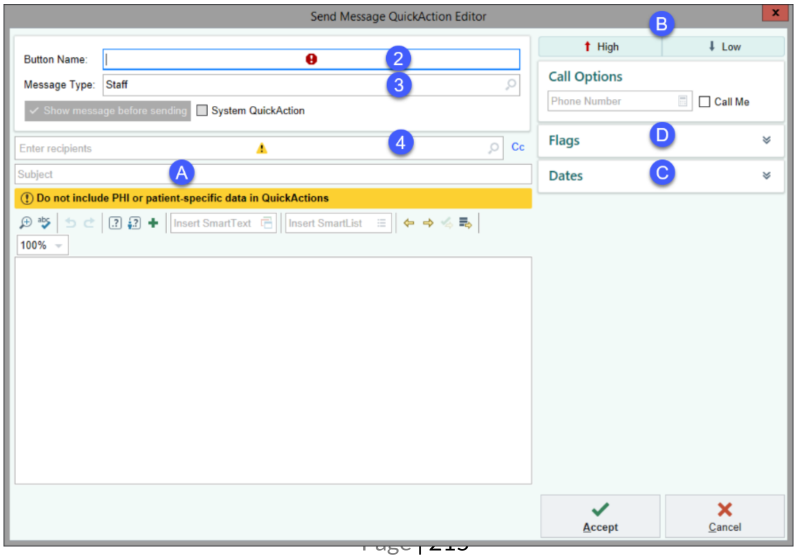


6. When you're done, click '**Accept**'. A new QuickAction button appears on the report toolbar in all messages of this type.



Staff Messages QuickActions

7. On the In Basket toolbar, click the arrow to the right of the ‘**Manage QuickAction’** button and select ‘**Send Message’**.
   a. The Send Message QuickAction Editor opens.
8. Enter a brief name for your QuickAction, such as "<u>FU 1 wk</u>," in the Name field.
9. In the ‘**Message Type’** field, select the type of message you want to send.
10. Enter your preferred recipients, such as yourself or your clinic's nurse pool
11. Configure the rest of the fields to meet your needs. Note that you'll have a chance to change these settings before sending your message:
    a. In the ‘**Subject**’ field, enter a title for your message. Note that this field does not appear for all types of messages, such as Patient Call Back.
    b. In the <u>Priority</u> section, optionally change the priority of your message to High or Low.
    c. In the ‘**Date’** field, enter the date you want your message to be sent. If you leave this field blank, the message is sent immediately. Use date shortcuts, such as "t" for today and "w" for week. For example, to have the system send your message in a week, enter "w+1".
    d. If you want to distinguish these messages with a flag, select one from the Flags list.



Routine Rx Requests QuickActions

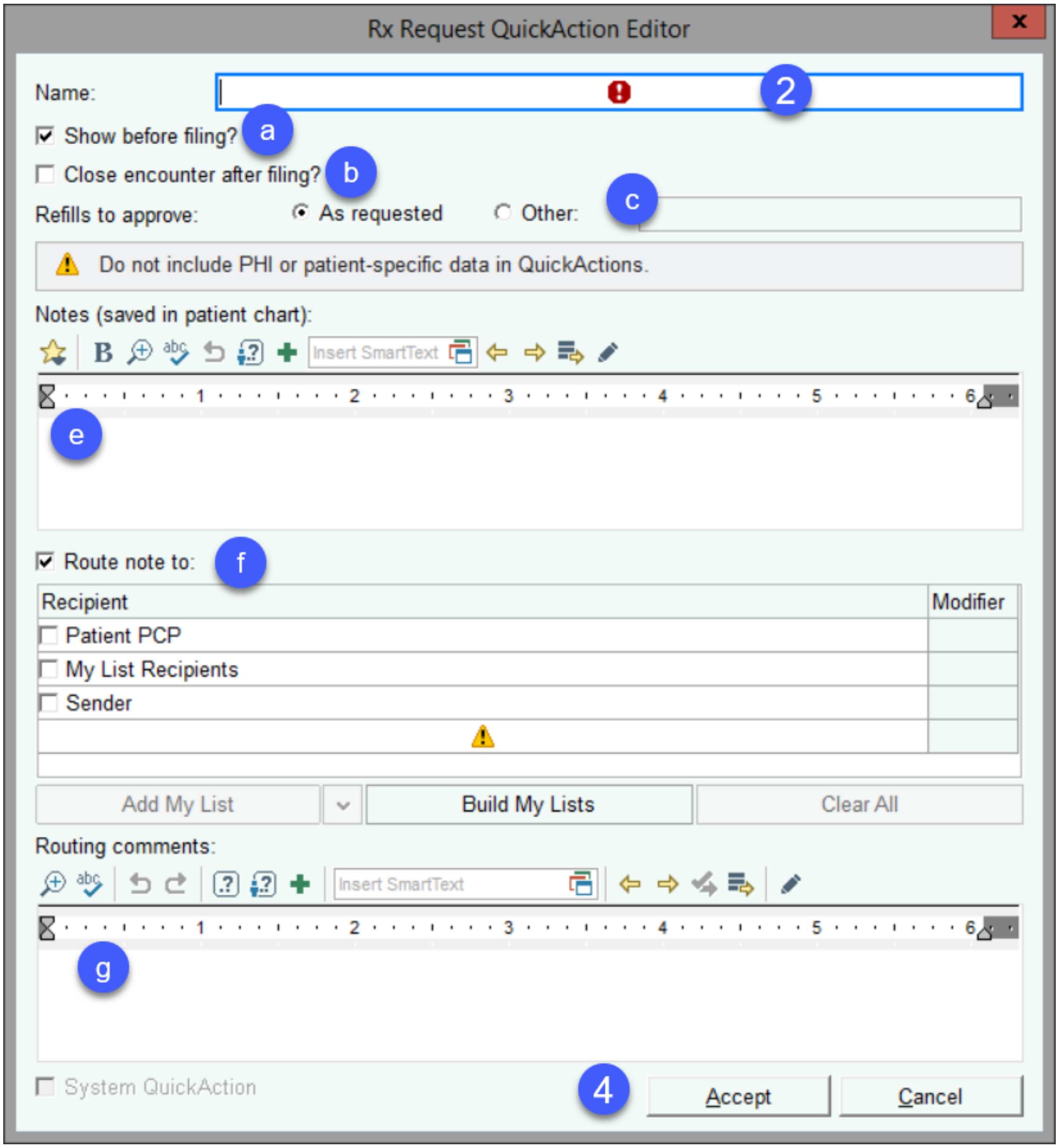
Respond to routine Rx Request messages in a few clicks using QuickActions. For example, you can create a QuickAction that refuses a request, indicates that the patient needs an appointment, files a note to her chart, and removes the associated message from your In Basket.

VIDEO REFERENCE

Epic '**It's Possible'** Video- QuickActions: RX Request **(POSS044)**

1. On the In Basket toolbar, click the arrow to the right of the '**Manage QuickActions'** button and select '**Rx Request Refuse'** or '**Rx Request Approve'**
2. Enter a brief name for your QuickAction, such as "Needs Appt", in the '**Name'** field
3. Configure the QuickAction to meet your needs:
    a. To have a chance to edit your response before it's sent, select the '**Show before filing'** check box
    b. To automatically close the refill encounter after sending your response, select the '**Close encounter after filing'** check box. This option is helpful if no additional follow-up with the patient is necessary
    c. For approvals, select the number of refills to approve. Select '**As requested'** to approve all refills, or select **Other** and enter the number of refills you want to sign
    d. For refusals, optionally enter a reason, such as "Patient needs an appointment"
    e. In the '**Notes'** field, optionally write a note that will be filed in the patient's chart. Any SmartLinks you use are personalized for the patient when you run this QuickAction
    f. To send the note to a colleague, select the '**Route note to'** check box and specify the recipients, such as the person who sent the request
    g. In the '**Routing comments'** field, enter any comments that you want to appear in the Rx Response message that's automatically sent to your nurse pool.

4. When you're done, click '**Accept**'. A new QuickAction button appears on the report toolbar in all of your Rx Request messages.



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