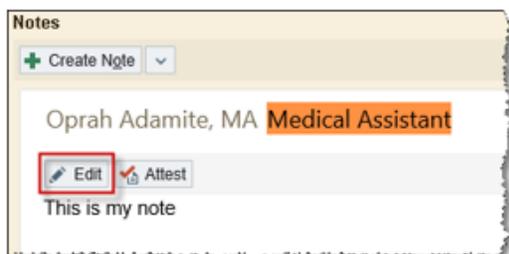


EPIC PHYSICIAN CONNECT

July 19 Ambulatory Go-Live | July 22, 2016

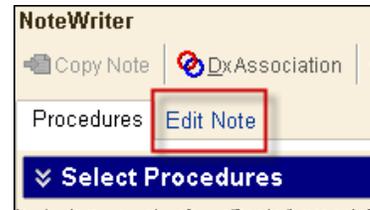
Important Updates: Editing Notes and Documentation Requirements

- To facilitate more efficient workflows:
 - Mid-level providers are now able to edit notes entered by MAs and RNs
 - Scribes are now able to edit notes entered by mid-level providers, MAs and RNs (not MDs)
 - The encounter provider is no longer the only one who can enter a note to close the encounter. If a mid-level provider or scribe has entered a note, this meets the documentation requirements and the visit can be signed/completed
- To edit someone's note, access the **Notes** activity. Click **Edit** and click **Make Me Author**



ProcDoc: Important Reminders

- Charges for the procedure drop when you click **Accept** to complete your procedure documentation. To see the **Accept** button, click the **Edit Note** link next to the **Procedures** tab.
- Charges for medications (J codes) don't drop until the progress note is signed
- Modifiers for laterality and for hand and foot digits are being added so they will drop automatically
- Units for medications should automatically drop based on the volume/quantity of medication administered
- You can view all charges in the **Charge Capture** section of the **Wrap-Up** activity once the note is signed
- From **Charge Capture** you can add or delete charges as appropriate
- Since medication charges don't automatically drop until the note is signed, and a note's default status is **Sign at Close Encounter**, you would need to change the default setting at the bottom of your note to **Sign on Saving Note** if you want to view the medication charges before the encounter is closed



- If you've closed the encounter and want to verify the charges, go to **Chart Review > Encounters** and review the encounter summary

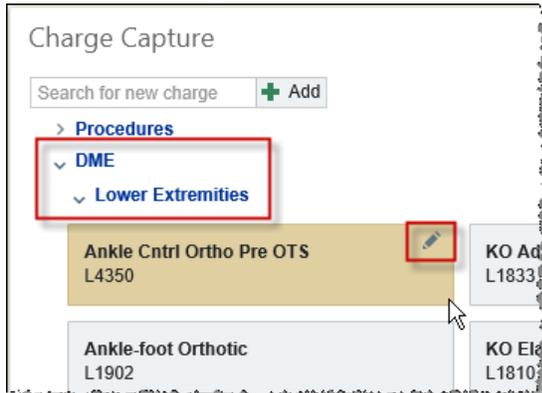
Important: Creation/Use of Test Patients Not Allowed in Live Epic Environment

- Our live Epic environment, also known as Epic "Production," is a place for documenting factual data for official Houston Methodist clinical and business operations only and for capturing real patient data and encounters
- Epic is not a play area. You should never create test patients or enter fictitious data in Epic
- If you've done this, please discontinue these efforts immediately
- Moving forward, use the Epic Playground for trying out workflows

- If you feel you have a legitimate need to test something in the live environment, contact itepicprodtestpatientmonitor@houstonmethodist.org to make this request

Ordering DME: Complete Charge Capture Immediately to Ensure Payment is Collected

- When ordering DME, be sure to complete charge capture immediately after signing the order so payment can be collected before the patient leaves the office
- After signing the order, navigate to **Wrap-Up > Charge Capture**. Select the **DME** charge capture dropdown lists and click the pencil icon to edit the desired charge. Address any required fields and click **Accept**
- Charges will be visible at **Check Out**
- View the [Ordering DME tip sheet](#) for details



Placing Lab Orders: When to Use “Lab Collect” and “Clinic Collect”

- Review the table below for information regarding which order **Status** and **Class** to select when placing lab orders, depending on your clinic’s specific scenario
- View the [Placing Lab Orders in Epic tip sheet](#) for additional details

Specimen Collection Scenario	Order Status	Order Class
Specimen collection is to be performed by the desired laboratory services, even if the laboratory services’ phlebotomist is physically in your clinic	Future	Lab Collect
Houston Methodist clinical support staff are responsible for specimen collection, packaging and sending to laboratory services	Normal	Clinic Collect

Viewing Historical Images on OR Workstations

- To view historical imaging studies captured in your clinic while you’re in the OR, *double-click* on the **GE Enterprise Universal Viewer** shortcut on the workstation desktop
- This shortcut should now display on all OR workstations across the system



Using Your In Basket: Training Designed to Help You “Thrive After Live”

- Use your Epic **In Basket** to view and take action on lab results, cosign orders, complete open encounters, address refill requests and communicate with patients, colleagues and clinical support staff
- As part of our commitment to help you “thrive after live,” the Epic Training team is offering two-hour outpatient **In Basket** training sessions designed to assist you and your support staff in developing proficiency with **In Basket** workflows
- The next three **In Basket** training sessions are listed below. To get scheduled, contact the Epic Training team at 832.783.1591 between the hours of 8 a.m. and 5 p.m. or at epictrainingmd@houstonmethodist.org

Date	Time	Location
July 26	3 – 5 p.m.	HMSL Computer Room
July 29	3 – 5 p.m.	Epic Training Center, OPC3
August 12	3 – 5 p.m.	Epic Training Center, OPC3

Get Epic on Your iPhone/iPad

- For access to Epic on the go, install Haiku (iPhone app) and Canto (iPad app)
- To install these apps, review the [Epic Mobile Quick Start](#)
- For FAQs and troubleshooting, review the [Epic Mobile Detailed Installation Instructions](#)
- Review the [Haiku for Smartphones](#) and [Canto for Tablets](#) quick start guides for details

Chart Locking: Key Points

Epic uses locking to prevent conflicting information from being documented (two people changing the same order at the same time) and to prevent potential duplicate entries and clinical errors (two people placing the same order for the same patient). When it comes to chart locking, keep in mind these key points:

- Avoid keeping the patient's chart open unless you are actively documenting
- As long as a section is still open, the lock will remain active for each open patient chart, even if you are not actively working on that chart
- If you're finished actively documenting on a patient, exit the chart by clicking the X on the tab with the patient's name
- Instead of directly accessing the patient's record, you can view the same information from the reports that appear in the bottom pane of your schedule or in **Chart Review**. This prevents locking others out of a patient's chart
- For more information on chart locking, including sections that lock and example scenarios, view the [Chart Locking tip sheet](#)

Back Office Imaging: Use Original Workflow Designed for Your Clinic

- The security issues you were experiencing with back office imaging workflows that were preventing you from seeing the **Reading Work List** and forcing workarounds for documenting of imaging studies should be resolved
- Effective immediately, please follow the original workflow as designed and discontinue use of these workarounds
- The original workflow requires you to document your interpretation of imaging studies using the Epic **Reading Work List > Study Review**. View the [Accessing Imaging Studies tip sheet](#) for information on accessing your **Reading Work List**
- Following the back office imaging workflow originally designed for your clinic is critical for ensuring patients receive their study results in Houston Methodist MyChart and for automated charge entry

Pain Assessment Scale SmartLink Development In Progress

- We've received requests to create a **SmartLink** that pulls pain assessment information documented during rooming into the note
- Development of this **SmartLink** is in progress and we'll let you know once it's available for use

Questions?

- Ask your onsite ATE support
- Contact the IT Help Desk Physician's Line at 832.667.5555, option 1

