EPIC PHYSICIAN CONNECT

July 19 Ambulatory Go-Live | July 27, 2016

Over 40,000 Patients Have Activated a Houston Methodist MyChart Account

- As of Tuesday, July 26, more than 40,000 patients have activated a Houston Methodist MyChart account
- To effectively communicate with your patients, be sure to monitor your **In Basket**
- If a patient requests a refill or sends a non-urgent medical question through MyChart, it will first route to your clinical staff's pool. If they need your assistance, they will route the request to you
- See below for detailed information on releasing results to patients through MyChart

Releasing Results to Patients through Houston Methodist MyChart

Automatic Results Release

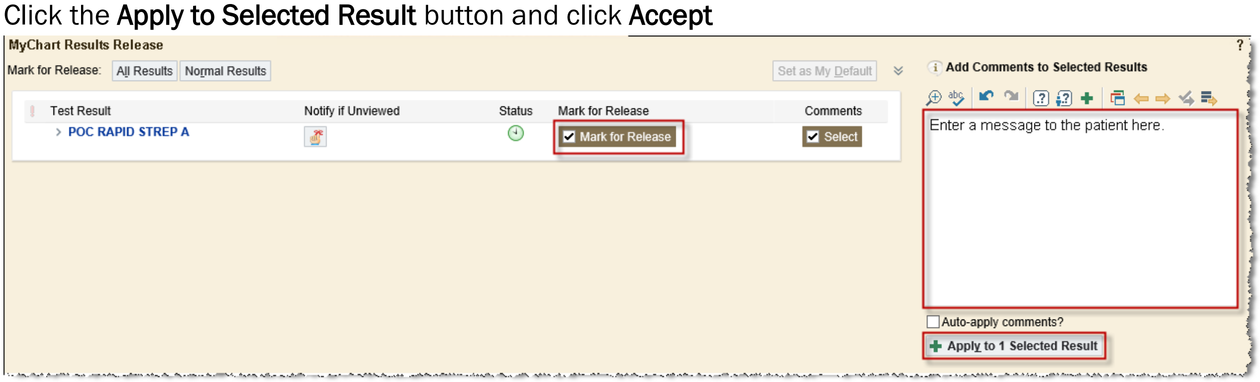
All test results will be automatically released to a patient's Houston Methodist MyChart account as follows:

Test Type	Release Timeframe
Non-Sensitive Lab Results	Auto release after four days
Sensitive Lab Results • Tumor Markers • Genetic Testing • Pathology Reports	Auto release after 10 days
Imaging Studies	Auto release after 30 days
Inpatient and ED Test Results	Auto release 36 hours post discharge

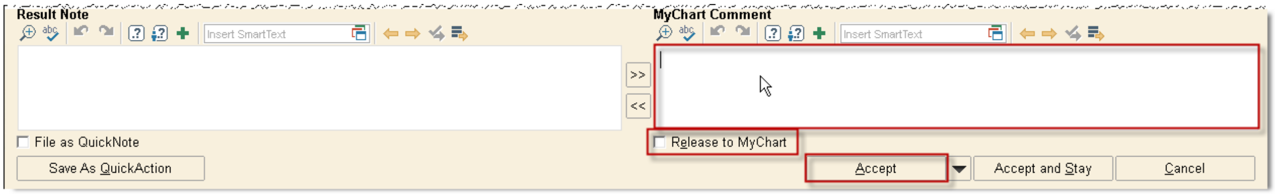
Manual Results Release

You have the option to manually release test results to a patient's Houston Methodist MyChart account sooner than the auto-release timeframes.

- **To manually release results to a patient from your In Basket:**
  - Navigate to the **Results** folder within your **In Basket**
  - Select the desired **Result** message
  - Click the **Result Release** button from the folder toolbar
  - Click the **Mark for Release** check box, and enter a comment in the **Add Comments to Selected Results** box. The text you add here is the message you're sending to the patient, along with the selected results
  - Click the **Apply to Selected Result** button and click **Accept**



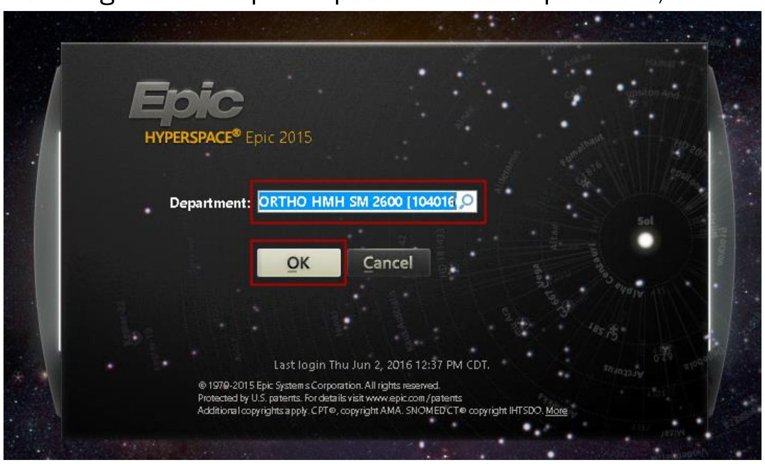
- *Note: If you're already planning to document a **Result Note**, you can also release the result to MyChart at the same time. After selecting the **Result** message and clicking the **Result Note** button from the folder toolbar, you'll see a **MyChart Comment** box. Enter a message to the patient here and select the **Release to MyChart** check box. Click **Accept***



- You can also release results to a patient from within the chart. For additional details, review the [MyChart Results Release tip sheet]

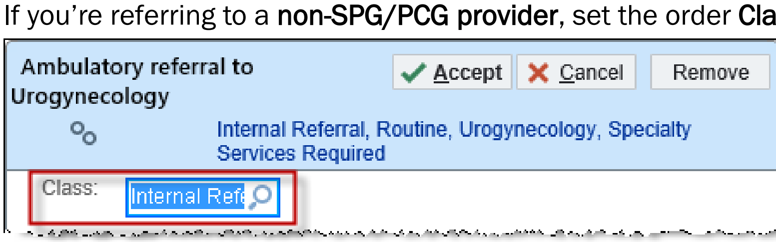
Important Reminder: Select Your Clinic Instead of a Hospital Inpatient Virtual Department When Logging In to Epic

- **No matter what setting you're in (ambulatory or inpatient), be sure to log in to your clinic department in Epic**
- Logging in to your clinic department is critical to ensure proper e-prescribing, hospital/professional billing and charge capture workflows
- Don't log in to a hospital inpatient virtual department, even when you're in an inpatient setting



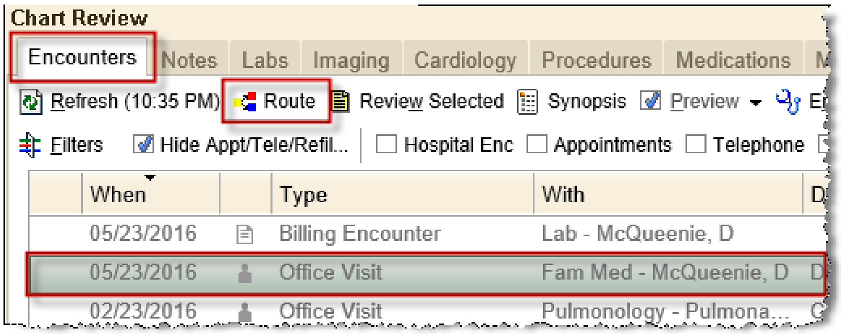
Placing Referral Orders: Key Reminders

- If you're sending a referral to a department that is live on Epic, referrals are processed electronically
- If you're sending a referral to a department that is not yet live on Epic, you must print and fax the referral order to the department or hand the order to the patient to follow up for scheduling
- Referral orders are placed in the **Medications & Orders** section, like all other orders. To search for a referral order, enter "ref" and a few letters of the desired specialty in the **New Order** field and press **Enter** (e.g., enter "ref uro" to locate a urology or urogynecology referral order)
- Select the following order **Class**, depending on the type of referral:
  - If you're referring to an **SPG/PCG provider**, set the order **Class** to **Internal Referral**
  - If you're referring to a **non-SPG/PCG provider**, set the order **Class** to **Outgoing Referral**

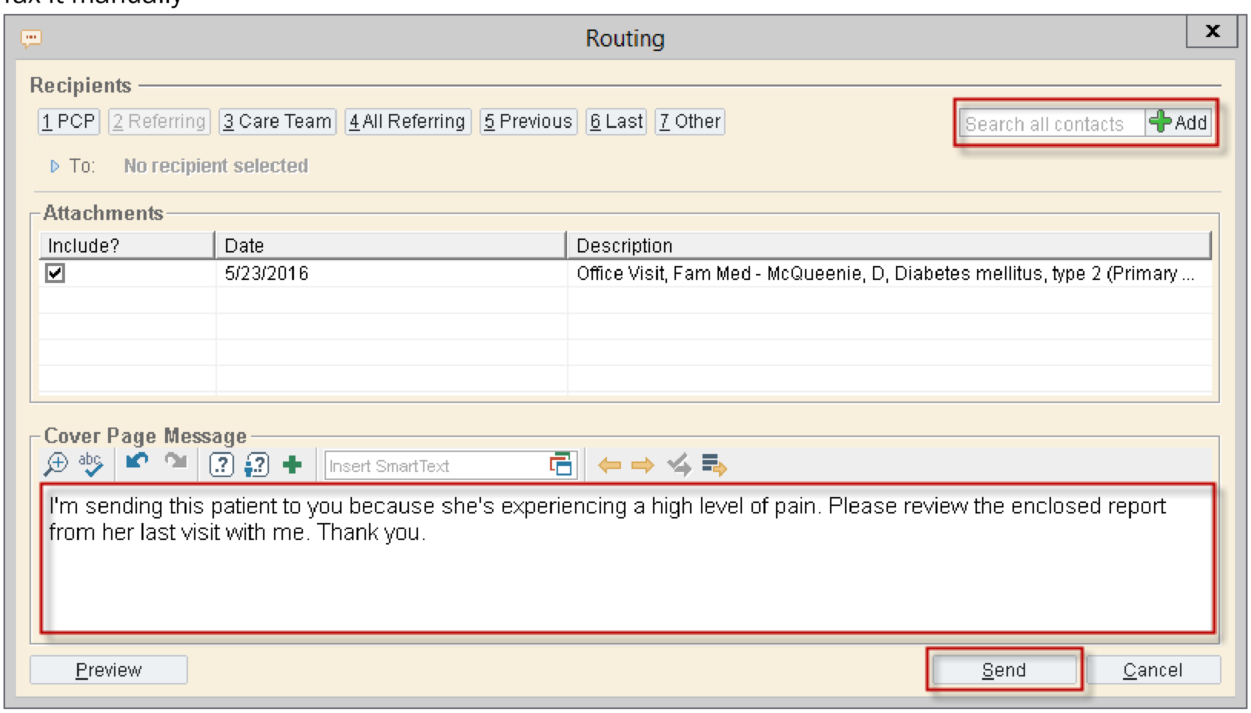


Communicating with "Refer To" Providers

- If you'd like to share a previous note or other relevant information with a "refer to" provider in advance of an upcoming visit, you can conveniently route them an encounter report, which includes the note, orders placed, visit diagnoses and other details. Here's how:
  - Access the patient's chart and go to **Chart Review** > **Encounters** tab. Select the desired encounter and click **Route** from the activity toolbar



  - Within the **Routing** window, enter the desired **Recipients.** To search for a provider, enter part of the name in the **Search all contacts** field and click **Add.** In the **Cover Page Message** box, enter a note to the provider. Notice the **SmartTools** toolbar displays to help speed up your documentation. If you'll be doing this frequently, you can create a custom **SmartPhrase** for convenience
  - Click **Send.** Epic will route the report and cover letter based on the settings on file for the provider. If the provider is on Epic, the information will be routed to the **In Basket**; if the provider isn't on Epic, the information will be routed via fax; if a fax number isn't listed, the report will print out so you can fax it manually

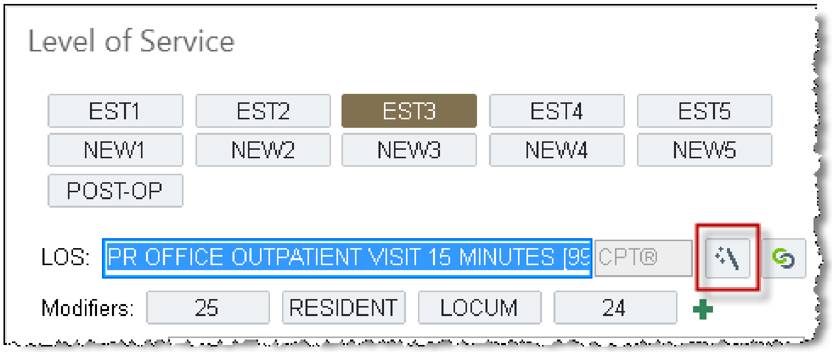


- The entire Surescripts provider directory is loaded in Epic, but if you can't locate the desired provider, contact the IT Help Desk and request the provider be added to our database

Billing for a Problem and Preventive Medicine Visit During the Same Encounter

- When complete and accurate supporting documentation is in the patient's chart, it's possible to bill for a preventive medicine and problem-related visit within the same encounter
- Within **Wrap-Up** > **LOS**, select the LOS for the problem visit. Then, click the **LOS** button (looks like a wand) > **Add E/M** button and enter the additional E/M code

- Review the [Problem and Preventive Medicine Visit Performed During Same Encounter tip sheet]() for details



Manage Preventive Care in the Health Maintenance Activity

- Use the **Health Maintenance** activity to manage your patients' preventive care and ensure they adhere to recommended preventive care schedules
- If the patient has any **Health Maintenance** items due, this section displays in yellow in the patient header. Click on this link to access the **Health Maintenance** activity

- From here, you can select a **Health Maintenance** topic and take a variety of actions, including:
  - **Postpone** – prevent the alert from appearing as due until the postpone date passes
  - **Override** – document a patient has completed the procedure at another organization or that the procedure is inappropriate for the patient
  - **Exclude** – exclude the patient from the particular topic
  - **Edit Frequency** – change the frequency of the alert to meet the patient's individual needs
  - **Edit Modifiers** – personalize a patient's **Health Maintenance** plan by including or excluding the patient from a plan as needed
  - Clicking the **Guidelines** button provides you with information about how the selected **Health Maintenance** topic and parameters are set

- For additional details, view the [Health Maintenance Activity tip sheet]()

Questions?

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