

# EPIC TRAINING



## Register a New Patient Quick Start Guide

HOUSTON  
**Methodist**<sup>®</sup>  
LEADING MEDICINE



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## Enter information for a new patient

When entering prescriptions for walk-in patients or for new patients from Surescripts, search for their records in the system. If you don't find the patient right away, try again by entering less information, using aliases, and so on.

Although most patients are already listed in the system, some walk-in patients or incoming Surescripts patients might not have records yet. In these rare cases, it's possible to create a new patient record.



Be very cautious about creating new patient records and do it only when absolutely necessary. Duplicate records created here appear as duplicates to the clinic and hospital staff, not just to the pharmacy staff. Such duplicates can severely compromise patient safety.

## Register a new walk-in patient

- When you're sure that a patient isn't already listed in the system, open **Front Counter** and click **New Patient** at the bottom of the window.
- Enter the patient's demographic information and click **Accept** to create a patient record.



You can copy a patient's MRN to your clipboard by right-clicking the MRN in the patient header, making it easy to open the same patient in Hyperspace.

## Review and update addresses

Willow Ambulatory is part of an integrated system. Most information you enter in Willow Ambulatory appears to staff in the clinic and hospital. The following information isn't intended to appear to staff in the clinic and hospital:

- Prescription address
- Which address is the default address used in the pharmacy
- Pharmacy notes
- Prescription coverage
- Select the **Patient** tab and click **Update** under Default address. Update the patient's information as needed.
- If necessary, change the default address for prescriptions by clicking the appropriate **Use this address** button. The default address is used for mail order fills, and only pharmacy staff see which address has been assigned as the default.
- If necessary, select the **Use Effective Dates** check box to specify the dates between which an address should be used, as in the case of a patient going on a trip.
- Click **Accept** to save the information.



Address Type	Used for	Who Sees It?
Home Address	The regular mailing address.	All clinicians
Prescription Address	A pharmacy-only address, such as a PO box or a campus mailbox.	Only pharmacy staff
Temporary Address	An alternative address, such as a vacation address.	All clinicians

 When a mail order patient calls to ask about the shipping status of their prescription, you can access this information by clicking a link to the shipping company's tracking page for the prescription from **Prescription History**. Select the prescription and click **Details** for access to this link and other shipment tracking information.

## Sign up a patient for MyChart

A patient's MyChart activation status appears in the patient header. If a patient isn't signed up for MyChart, you can send them a text or email containing a link to sign up.

- Click **Inactive** in the patient header.
- Specify whether the patient wants the MyChart activation link to be sent in an email or in a text.
  - If they want it sent in an email, enter their email address.
  - If they want it sent in a text, enter their phone number.
- Verify whether the patient wants the email address or phone number saved in the system and send them the link.

 Resending MyChart activation information invalidates any previously sent links.



## Add new personal insurance coverage

- Click **Add** under Personal Coverages.
- Complete the fields based on the patient's insurance information and accept the new coverage.

The **Filing order** field in the **Coverage Information** window specifies the order in which the system selects coverages for adjudication. The options for each coverage are:

- Primary, such that the system selects the corresponding coverage first
- Secondary, such that the system selects the corresponding coverage second
- Tertiary, such that the system selects the corresponding coverage third
- No preference, such that the system doesn't select the corresponding coverage in a particular order
- Don't file automatically, such that the system would never select the corresponding coverage without manual input

## Add workers' compensation

- To record workers' compensation, click **Add** under Additional Accounts/Coverages and enter the necessary information.
- Click **Accept**.

## Update existing coverage

- To modify an existing coverage, select it and click **Edit**.
- To delete an existing coverage, select it and click **Delete**. A warning appears. Click **Yes** to delete the coverage.

*Note that you won't be able to delete a coverage if there has already been a prescription adjudicated to the coverage.*

- To end a coverage (for example, when the patient switches to a new one), click **End Coverage**. The coverage turns gray and becomes read-only, indicating that it's no longer active. You can restore it by clicking **Edit** and adjusting the **Effective to** date.



## Verify a patient's eligibility

- Click **Eligibility** under Personal Coverages and complete the fields based on the patient's information.
- Click **Accept** to see the requested information, which helps you verify whether a patient has valid Medicare Part D eligibility or prescription benefit coverage.
- Add any relevant coverages to the patient's record.



If you update information in the Get Eligibility window, that information is not automatically updated in the patient's chart. To ensure that information in the patient's chart is updated, update the patient's chart directly and click **Eligibility** again.

## Add or update a patient's FYIs

Patient FYIs are discrete, audited notes that you can use to record useful information about a patient, such as indicating that they might be abusing their prescription drugs or recording their flavor preference.

- To create a new FYI:
  - Click the **Add** button above the list.
  - In the Create FYI window, select a type for the new FYI. You are limited to selecting only the FYI types that you have the ability to edit.
  - Enter a comment for the new FYI, if necessary.
- To edit an active FYI, select it in the list. The Edit FYI window appears.

If you select an FYI and don't have the ability to edit either that FYI or any FYIs at all, the View FYI window appears instead. It shows the same information, but there aren't any editable fields.

- To deactivate an FYI, click either **X** in the list or **Deactivate** in the Edit FYI window. Deactivated FYIs no longer appear in the list by default.
- To show deactivated FYIs in the list, click **Show <number of deactivated FYIs> deactivated** above the list. The View FYIs window appears when you select one of them.
- To reactivate an FYI, click either the **Add** icon in the list or **Reactivate** in the View FYIs window.



BestPractice Advisories, which are used to guide users' decision-making related to patients' prescriptions and appear when you open a patient's chart, often suggest adding a related FYI to a patient.



## Add or update a patient's documents

To add a new document, click **Add** under Documents.

- Click **Add** under Documents and add information in the appropriate fields. Enter your name in the **Received by** field.
- Click **Accept**.

To update an existing document, select the document and click **Edit**.

To renew a document's expiration date, click **Renew**. Enter a new expiration date and accept the change.

### Review and update allergies

- Select the **Allergies/Contraindications** tab.
- Click **Add**.
- Enter the first few letters of the allergen in the **Agent** field and press **Enter**.
- Double-click the appropriate allergen.
- Add a reaction and enter the relevant information for it.
- Click **Accept**.
- To update an allergy, click the name of an allergen and then click **Edit** to modify the information as necessary.
- To review any interactions, click **View Drug-Allergy Warnings**.

There might also be unreconciled external allergies that need to be reconciled. These are in a separate list in the Allergies/Contraindications activity.

- Select an unreconciled allergy and click **Approve Change**.



To remove either a single unreconciled allergy or all unreconciled allergies, click **Discard Change** or **Discard All**, respectively.

- Edit the allergy as necessary and accept the changes.