Feb. 21 Epic Update Companion



ED MD/Emergency Department

Updated: 1/26/21

On **Sunday, Feb. 21**, Epic will be updated with new features and enhancements to improve safety and quality of care, productivity, and financial outcomes. This *Update Companion* contains details of the changes for your role. It is your sole training resource so be sure to review it carefully

This Update Companion is prepared for the following job roles/functions:

- ED MD
- ED Midlevel
- ED Nurse Practitioner

Top Changes for Role/Department:

- 1. New Musculoskeletal Form
- 2. Add SmartPhrases by SmartList
- 3. New SmartPhrase Manager
- 4. Decision Support Exception Question
- 5. Results Info on Storyboard



If you need help with Epic, be sure to visit our library of tip sheets in the Epic Learning Home. Simply press F1 on your keyboard while logged in to Epic.





Guided Playground Practice

Exercises to help you prepare for the coming changes.

After reviewing this document, use it as a guide to see the new features for yourself in the Epic Playground. Playground practice helps you prepare for the update so you can stay focused on patient care.

Playground User ID: EMERO1 Playground Password: train Department: HMSJ ED

Key workflows for you to practice include:

- New Musculoskelotal Form Select any Terri patient. Go to My Note activity. Select My Note to open note. Select Physical Exam > Musc > Elbows. Document swelling of right elbow and add icon for tenderness to right elbow. Select Normal for Left Elbow. Type any comment in the Comments area below. Review information added to My Note on left of screen.
- New SmartPhrase Manager- Using same Terri patient, click MDM and green plus sign to open SmartPhrase Manager. Review new layout of the manager. Refer to information in Companion if needed along with videos for reference

Note



New Musculoskeletal SmartForm

Key Benefits:

More Efficient

Description:

A. Region-Specific Tabs Replace the Avatar.

The avatar is replaced with region-specific Upper, Back and Lower tabs.

B. The Annotation Images Are Reorganized.

The annotation images that appear correspond to the tab that is open.

C. The Comments Box Always Appears.

The Comments box always appears below the annotation images instead of having to click to view one or the other.





SmartPhrases Can Be Added by SmartList

Key Benefits:

• Time Saver

Description:

Customize notes by selecting appropriate **SmartPhrases** using your **SmartList**. This feature is limited to only your **SmartLists**.

To create a **SmartList** you will type a dot phrase or use the star icon for favorites to select **SmartPhrases** to add to your **SmartList**.

| hoice | Default? | * Settings |
|-----------------|---|---------------------------|
| PHR,ENDOSCOPY} | | Name |
| PHR,COLONSCOPY} | | sgnmyProc |
| erc | ☆ 🗆 | Display Name |
| Name | Description | 8 |
| ☆ ERCD | ERCD on @TODAYDATE@ | |
| | Breast imaging density and findings | |
| | Displays the procedure associated with the current or | der or all linked orders. |

Click <u>here</u> for video on **Personal SmartLists**



epictraining@houstonmethodist.org | it.houstonmethodist.org



SmartPhrase Manager Updates

Key Benefits:

Improved Workflow •

Description:

It's now easier to search, share and copy SmartPhrases.

- 1. Switch between your phrases and system phrases.
- 2. Searching for SmartPhrases from the current SmartPhrase list
- 3. Access the Share and Copy actions through two separate toolbar buttons.

Click here for video on Borrowing SmartPhrases.

Click here for video on Sharing SmartPhrases.

| $\leftrightarrow \rightarrow \cdot$ | SmartPhrase Manag | er - MD, ROBERT SUTTON [50001] | © × |
|-------------------------------------|--------------------|--|-----------------------------|
| SmartTexts | Level: User Profil | e Department Location Facility User MD, ROBERT SUTT P | |
| SmartLists | User SmartPhrase | Edit 🕍 SmartPhrase Lookup 🥂 Share With 📓 Copy To - Remove From List 🍵 Delete | Search: Search Current List |
| SmartPhrases | Name | Description 3 Editors | 10 2 |
| | CLINEXAM | CLINICAL: Screening examination. Clinical breast examination performed by the technologist toda MD, ROBERT S | SUTTON 101634 |
| SmartLinks | BASEEXAM | CLINICAL: This is a baseline examination. *** FINDINGS: Bilateral XCCL, CC, and MLO views wer MD, ROBERT S | UTTON 101635 |
| Find SmartLinks | FINALASSESS | FINAL ASSESSMENT: BIRADS: Category 0 - Incomplete. The imaging department will send a lett MD, ROBERT S | UTTON 101636 |
| | CLINSCREEN | CLINICAL: Screening. Clinical breast exam performed by the technologist today was negative for MD, ROBERT S | UTTON 101637 |



Macro Manager and Editor

Key Benefits:

- More Efficient •
- **Time Saver** .

Description:

The Macro Editor's style has been updated to match other NoteWriter activities and added the Macro Manager. You can search, browse and add yourself as a user to macros created by others.



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Orders



Decision Support Exception Question

Key Benefits:

• Patient Safety

Description: The Decision Support Exception Question appears when you order imaging procedures.

| Second Sign: | | |
|----------------------------|------------------------------------|--|
| | signoff for this order required by | |
| Decision Support Exception | | |

Medication Administration



Quickly See When a Medication Was Last Acted On

Key Benefits:

• Time Saver

Description:

Quickly see when a **Done** medication was last acted on by looking under its name in the **Medication Status** section of the **Side by Side Workup** workspace and in the hover bubble for the **Med Status** section of Storyboard.

| Medication Status | |
|--|--|
| ODone 🕆 | |
| potassium chloride (K-DUR,KLOR-CON) CR tablet 60 mEq | |
| Last action: Stopped at 10/16 1607 | |
| Total administered: 60 mEq | |



Patient Info



Improved Care Everywhere Status Activity

Key Benefits:

- More Efficient
- Time Saver

Description:

The **Care Everywhere Status** activity now shows patient status and authorization in one place.

- 1. The Care Everywhere Information section displays patient's Care Everywhere ID, participation status and any organizations patient the patient is linked to.
- In the Authorization section, you can collect authorization and see a list of authorization entries.

| re Everywhere Status | | |
|--|--|---------------------------------|
| Care Everywhere Information @Learn more about Care Everywhere | 1 Authorization | |
| Care Everywhere ID | Collect Prospective Authorization | |
| DC-114-6590 / 🚩 | Valid: Today until 06/10/2020 | |
| articipation Status | Organizations: Choose an organization/location | we All |
| Participation Not Participation | River Hills Health Care | × |
| Always require authorization when Care Everywhere documents are requested. | Lakeland Valley Hospitals and Clinics | × |
| nked Outside Organizations | Authorizes: Sending and Requesting | |
| ∋ River Hills Health Care ■ Lakeland Valley Hospitals and Clinics | Patient authorization is required to release clinical information to outside organizations. By clicking Mark as Collected, you certify that you have collected the patient's signature. | |
| Care Everywhere | l | Also show non-current authoriza |
| | Organizations Effective Expires Authorization Type | Authorizes |
| | River Hills Health Care 03/23/2020 03/24/2020 Signed at point of car | e. — |
| | Lakeland Valley Hospitals and Clinics 05/10/2020 06/10/2020 Prospective | Sending and Dequesting |
| | | Sending and requesting |



New Care Everywhere Records Activity

Key Benefits:

- More Efficient
- Time Saver

Description:

Relevant information is more accessible and consistent with **Chart Review**. The activity now has three tabs:

- Overview
- Documents
- Results

Click here to view a tip sheet.



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New Look for Care Everywhere Documents

Key Benefits:

More Efficient

Description:

To align more closely with **Chart Review**, we've updated the appearance of Care Everywhere documents. For example, most action buttons now appear in the report toolbar. Also, you can use the wrench icon to modify your preferred section order.

| | | | | | | Ve |
|---|---|-----------------------------|-------------------------------------|------------------------|------------------|--------------------------------|
| - C H B B | | | | | € Updat | te 🔄 Jump to Section 👻 🏓 💭 |
| Clinical Summary | | | | | | 02/03/2016 |
| River Hills Health System ource Organization | | | | | | |
| Alexander Hopkins - 67 y.o. Male; born Nov. 10, 1952 | | | | | Clinical Summary | , generated on Feb. 03, 2016 |
| ource Comments - River Hills Health System | | | | | | |
| ource Comments - River Hills Health System River Hills Health System has fully implemented EpicC Allergies | are in all departments except Dermatology. | | | | 5 | Reconcile with Patient's Chart |
| Source Comments - River Hills Health System River Hills Health System has fully implemented Epico Allergies Active Allergy | are in all departments except Dermatology. Reactions | Severity | Noted Date | Comments | 5 | Reconcile with Patient's Chart |
| Cource Comments - River Hills Health System River Hills Health System has fully implemented EpicC Allergies Active Allergy Penicillins | are in all departments except Dermatology. Reactions Rash | Severity Medium | Noted Date 12/29/2014 | Comments | 5 | Reconcile with Patient's Chart |
| Cource Comments - River Hills Health System River Hills Health System has fully implemented EpicC Allergies Active Allergy Penicillins Current Medications | are in all departments except Dermatology. Reactions Rash | Severity Medium | Noted Date 12/29/2014 | Comments | 5 | Reconcile with Patient's Chart |
| Cource Comments - River Hills Health System River Hills Health System has fully implemented EpicC Altergies Active Allergy Penicillins Current Medications Prescription | are in all departments except Dermatology. Reactions Rash Sig. | Severity Medium Disp. | Noted Date 12/29/2014 Refills | Comments Start Date | 5 End Date | Reconcile with Patient's Chart |



Vaping History at a Glance

Key Benefits:

Improved Communication

Description:

The answers to vaping status questions now appear in the section of a patient's **History Summary** in the **Side-by-Side Triage** workspace for quick reference alongside similar information.

| History Summ | ary a |
|----------------------------|--|
| Medical • Active asthma | (Last reviewed by Jacey Young on 03/1 |
| Social (Last review | wed by Jacey Young on 03/11/20 1719) |
| Tobacco: | Never Assessed 📄 |
| Smokeless: | Former; Types: Chew |
| Vaping: | Current Every Day User; Start date: 1/2/20; Substances: THC 📄 |
| Alcohol: | Yes 📑 |
| Drugs: | Not Asked 📄 |
| Sexual activity: | Not Currently; Female partners 🖹 |
| Family | wed by Jacey Young on 03/11/20 1718) edical History s |
| Socioeconomic | (Last reviewed by Jacey Young on 03/11/20 1403) Is |
| Go to the History activity | to mark the patient's history as reviewed. |





Hover Over Cooler Icon in Storyboard For Transplant Info

Key Benefits:

Time Saver

Description:

Hover over the cooler icon in Storyboard to see a list of transplant episodes. Click the icon to view the list.



Kathryn D. Kidney Female, 52 y.o., 4/10/1966 MRN: 202870 Code: FULL (has ACP docs)

Allergies: No Known Allergies

All Transplant Episodes

Liver Transplant - 4/28/2019 (#1) Status: Active Follow-up on 4/28/2019 Coordinator: Epic User

New **H**Feature

Storyboard Differentiates Older Results from Newer Results

Pharmacy: None

O Search Isolation: None Kidney Coordinator: Me Coverage: None

Key Benefits:

• Time Saver

Description:

Hovering over new results in Storyboard shows when an updated result is performed more than 30 days ago to help decide clinical relevance.

| NEW RESULTS (LAST 36H) | | | | | | | | 8 | | | Resp |
|--------------------------|-----------|--------------|-------------|-----------|------------|-----------------|------------|-----------|---------|--------------|-----------|
| ❶ Lab (2) Imaging (1) | Older Re | esults | | | | | | | | Sorted by up | date time |
| | (1) These | results were | recently | updated l | out were o | collected or pe | erformed o | ver 30 da | ys ago. | | |
| | Updated | Order | | | | | | | | | |
| | 11/09/20 | X-RAY FO | OT 3+ V | W | | | | | | | |
| | 1409 | Performed | d: (j) 07/0 | 06/20 000 | 0 Prelim | inary | | | | | |





Unable to Access Allergy Review Status in Storyboard

Key Benefits:

Improved Communication

Description:

When you document a patient's allergies as **Unable to Assess** and the patient previously had no allergies documented, **Unable to Assess** appears instead of a review status like **Not on File** or **No Known Allergies** (A).

If the patient had allergies previously documented, **Unable to Assess** appears with those allergies (B).



Miscellaneous



Click to Share Ideas with Epic

Key Benefits:

Improved Communication

Description:

Submit ideas for enhancements and view previous suggestions for improvements to Epic through ideas.epic.com using one of three methods:

- 1. Click a new lightbulb icon on the main toolbar in Epic on your workstation.
- 2. Use Chart Search (search: Submit Ideas to Epic).
- 3. Select the **Submit Ideas to Epic** option on the **Help** menu (**Epic button > Help**).





Automatic Secure Chat Availability Status

Key Benefits:

- Improved Communications
- Time Saver

Description:

System actions that you take in your everyday workflows, like logging in or out of Epic, will set your availability status for you. You can change your personal availability settings on the **Chat Settings** screen in **Secure Chat** in Epic.

| ⑦ Set your ava status you cl | ilability settings here. Even though other workflows can set your availability status for you, the noose will take precedence when it's newer or busier than the automatic statuses. |
|---------------------------------|---|
| ✓ Automatical | y update my availability |
| When I'm logg | jed into Hyperspace: |
| O Show me | as Available |
| 💿 Don't cha | ange my availability |
| When my stat | us hasn't been set: |
| 0 | as Unavailable |
| O Show me | |

