

# EPIC TRAINING



## Telepsychiatry Workflow for Amwell and SOC Providers

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





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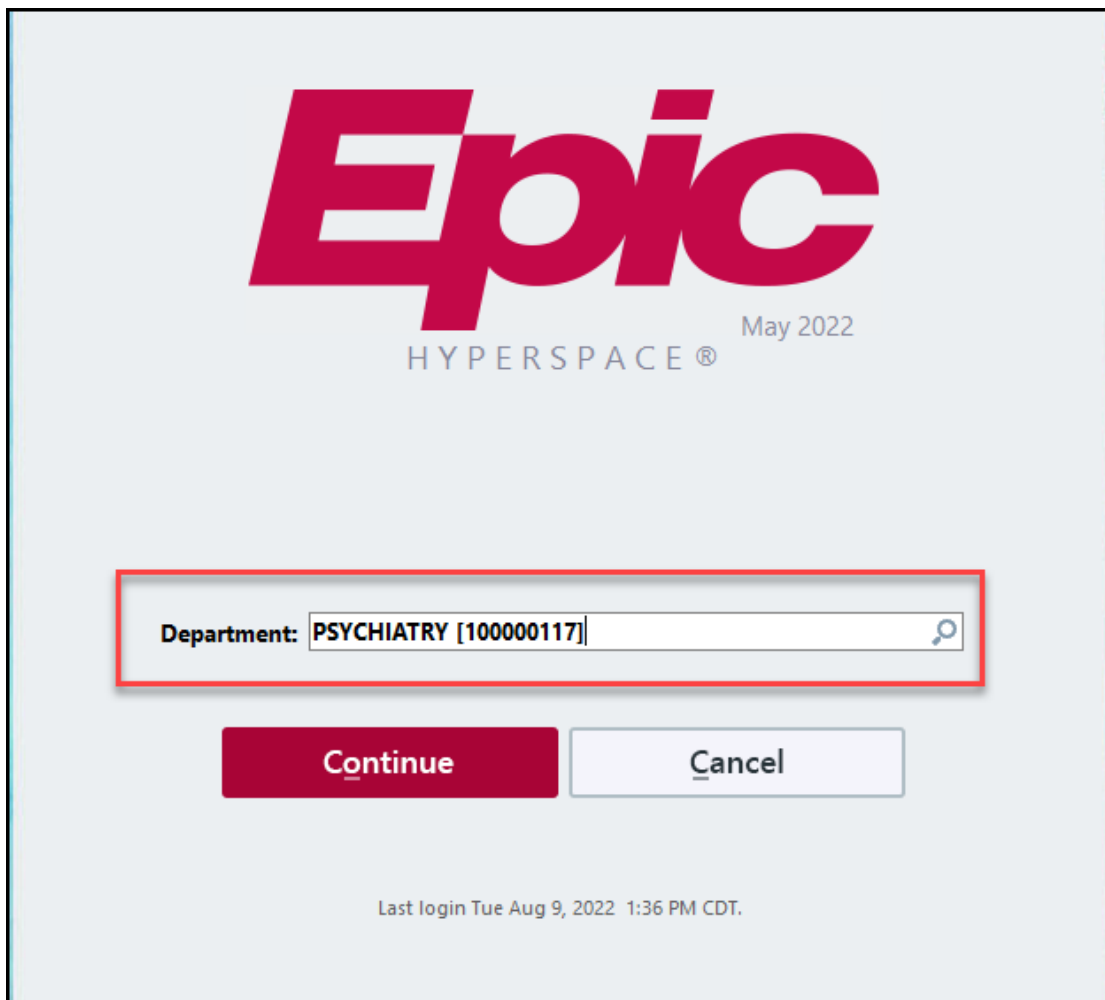
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Audience: Amwell and SOC Providers

## Login Department

After logging into Epic with your Houston Methodist credentials, a screen will appear for you to select the designated department. In the **Department** drop-down field, enter **Psychiatry**, as shown below.

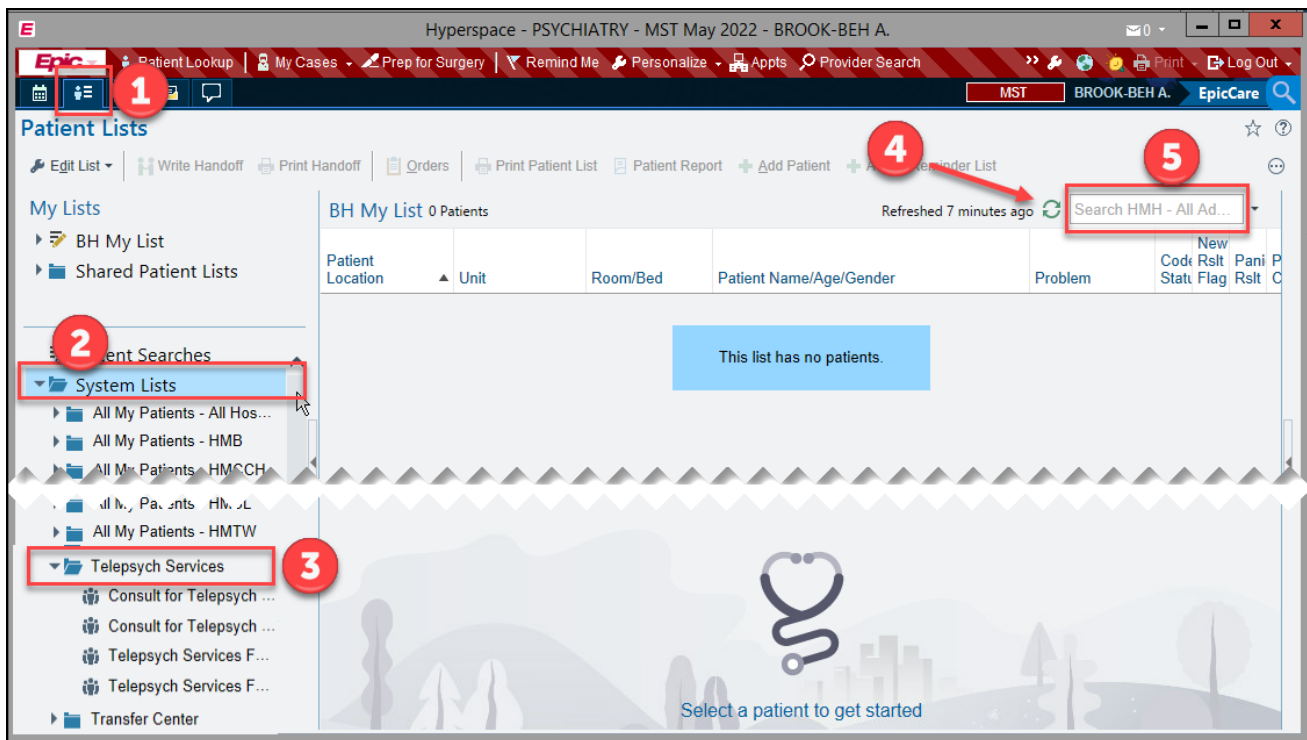




# Locating Patients

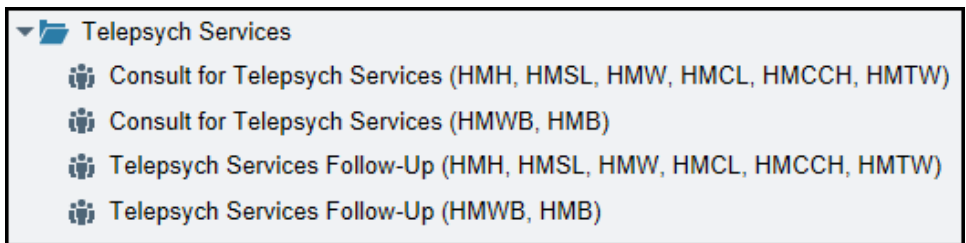
Once logged in to Epic:

1. Navigate to the **Patient List** activity (the top, left side of your screen).
2. Expand **System Lists** folder.
3. Locate and expand **Telepsych Services** folder.
4. Click here to refresh list.
5. Use **Patient list** search to find patients not on the consult list.



## Accessing Patients on the System List

These lists will display patients who have a consult or follow-up order for telepsych services, sorted by facility.



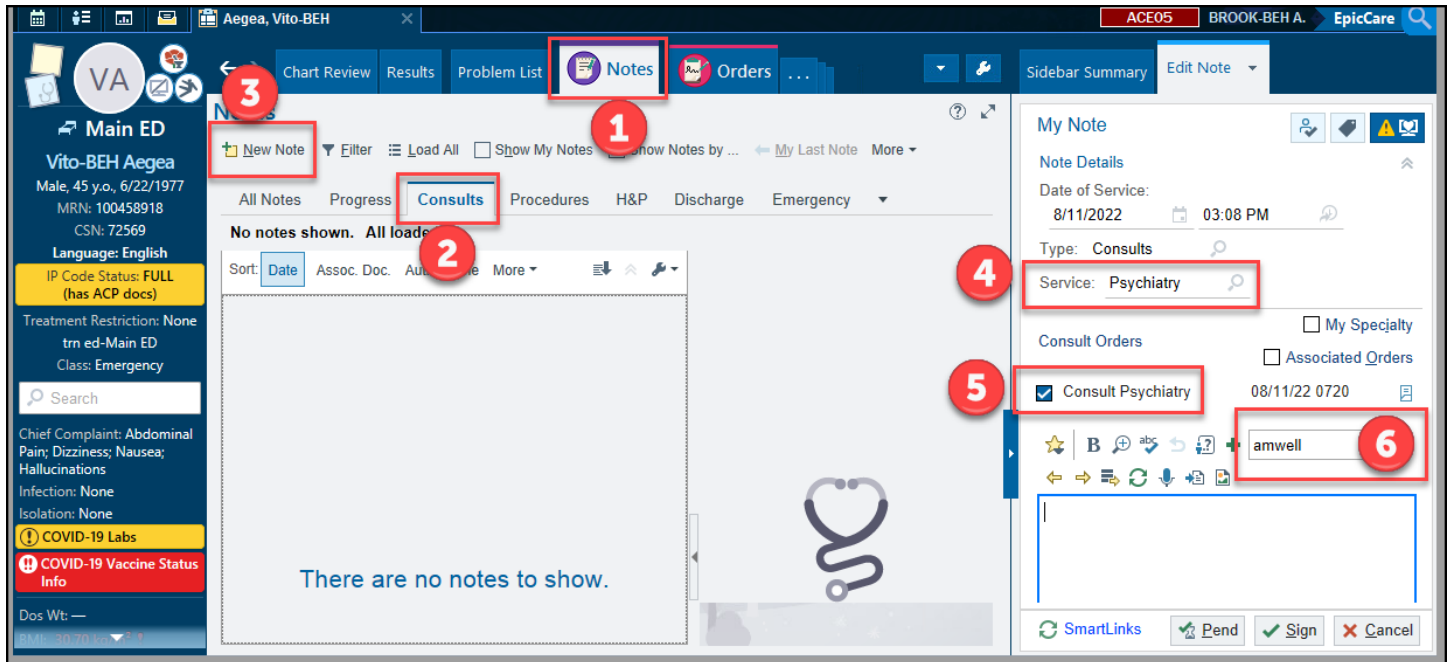


# Consult Note

## Locating and Starting a Note

Open the patient's chart by double clicking the patient's name, on the **Patient List**.

1. Locate the **Notes** tab inside the patient's chart.
2. Select **Consults** tab.
3. Click **New Note**.
4. For **Service**, enter **Psychiatry**.
5. Link note to consult order by clicking the **checkbox** next to **Consult Psychiatry**.
6. Type **Amwell** or **SOC** in the **Insert SmartText** box to utilize the template.







## Accessing the Consult Note Template

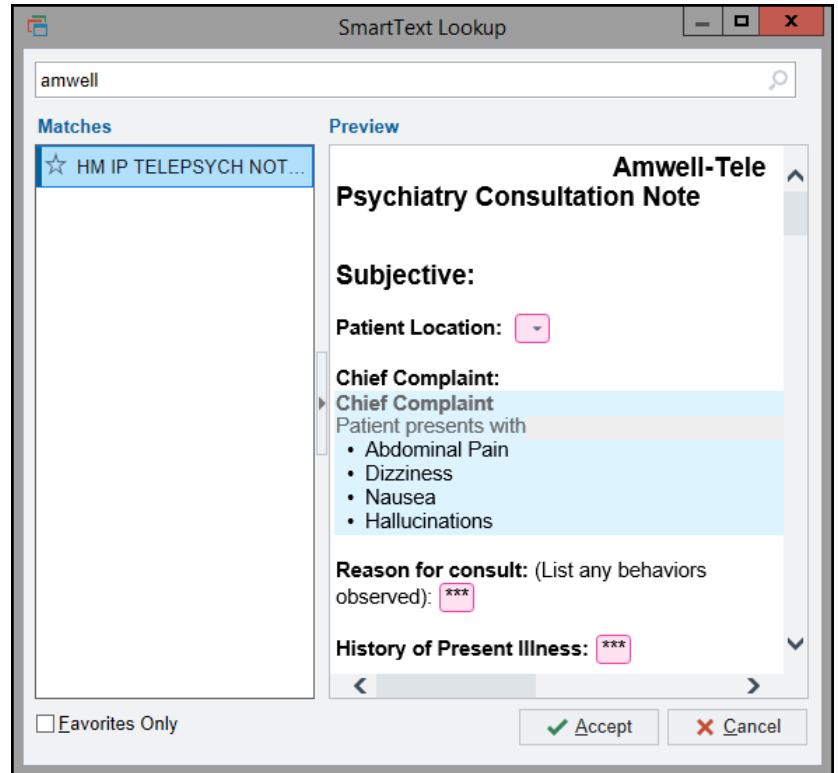
The **SmartText Lookup** window will appear. The note template will be highlighted, click **Accept**. The note will be displayed for your completion.

## Completing the Consult Note Template

### SmartLists and Wildcards

Once the note has been selected, you can navigate the note by using your **F2** key on your keyboard or choose **Next Field** from the right-click menu. You must complete all the

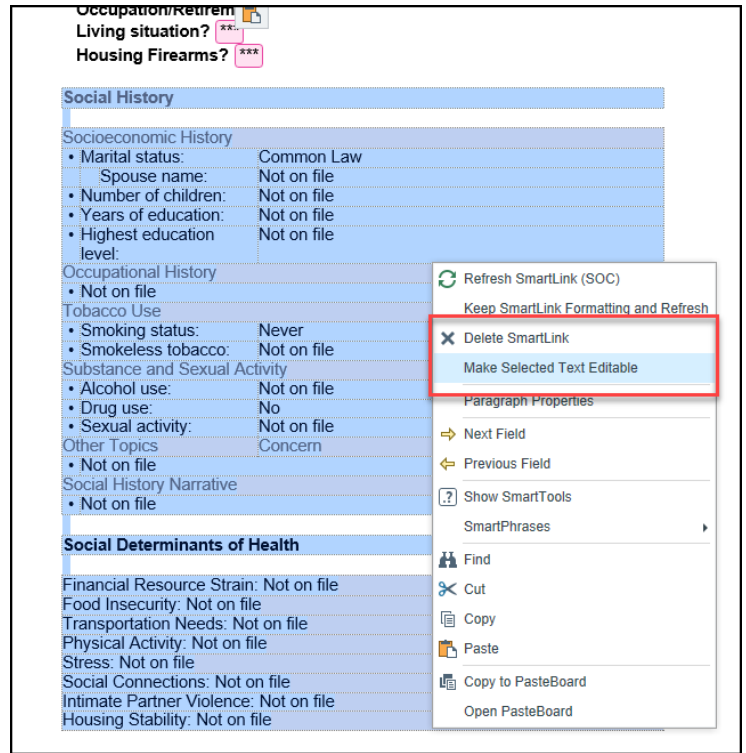
**SmartLists**  and **wildcards**  before you can sign the note. Once you've made your selection in the **SmartLists** drop-down, press enter, and the template will take you to the next field. **Wildcards** are free-text fields. Once you complete the free-text fields, you can go to the next item by pressing **F2**.





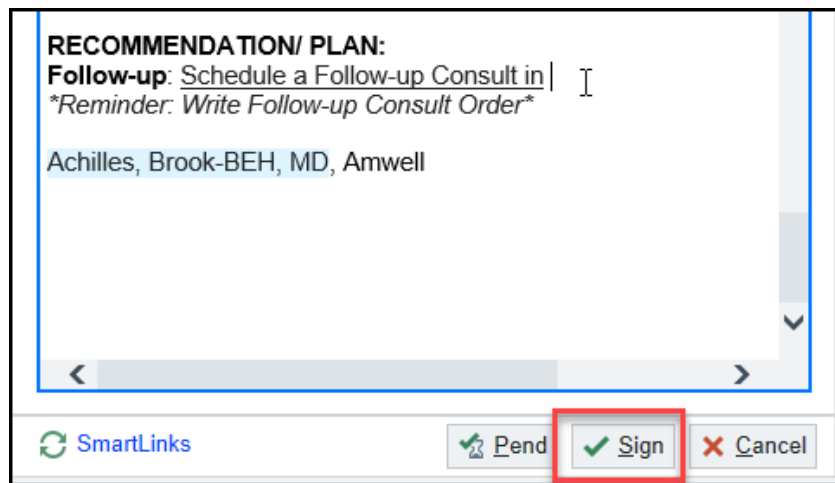
## SmartLinks

Parts of the note template consist of **SmartLinks** which are displayed as information highlighted in blue. They'll auto-populate from what has been entered in the patient's chart. If the information isn't found in the patient's chart, it will display "not on file" or the field will be blank. The tables can be edited by right-clicking on them and selecting **Make Selected Text Editable**. If the table needs to be deleted, you can select **Delete SmartLink**.



## Sign the Consult Note

Once all documentation has been completed, click **Sign** in the bottom-right corner.





# Placing an Order


## Placing a Follow-Up Consult Order

1. Navigate to the **Orders** tab.
2. Enter **Telepsych** in the **Place orders** field.
3. Double-click **Consult for Telepsych Services Follow Up Consult**.
4. The **Consult for Telepsych Services Follow Up Consult** order will open. Complete the required fields and then click **Accept**.
5. Click the **Sign** button in the bottom-right corner.

The screenshot shows the Epic Orders interface for a patient named Aegae, Vito-BEH. The 'Orders' tab is selected, and a search for 'TELEPSYCH' is performed. The search results show two options: 'Consult for Telepsych Services Follow Up Consult' and 'Consult for Telepsych Services Initial Consult'. The first option is selected. The order form is open, showing fields for 'Process instructions', 'Priority', 'From', 'Reason for Consult', and 'Day(s) to Follow Up patient'. The 'Sign' button is highlighted in the bottom right corner.



## Placing a Medication Order

1. Navigate to the **Orders** tab.
2. Enter desired medication in the **Place orders** field, then hit enter.
3. Select desired medication on the **Order and Order Set** pop-up and click **Accept**.
4. When entering multiple orders, use **Select and Stay**.
5. Complete the required fields  and then click **Accept**.
6. Click the **Sign** button in the bottom-right corner.

The screenshot displays the Epic EMR interface for a patient named Aegaea, Vito-BEH. The 'Orders' tab is active, and the 'Place orders' field contains 'celexa'. An 'Order and Order Set Search' pop-up is open, showing 'CELEXA' as the selected medication. The 'Order and Order Set Search' table lists the medication details:

Code	Name	Freq...	Generi...	Phase of...	Pref List
30264	citalopram (CeleXA) tablet	ever...	No		HM IP M...

The 'Order and Order Set Search' pop-up also shows 'Select And Stay', 'Accept', and 'Cancel' buttons. The 'Orders' tab shows the 'PRN' order type and the medication details: 'acetaminophen-codeine (TYLENOL WITH CODEINE #3) tablet'. The 'Order and Order Set Search' pop-up also shows the 'Dose' field with a red box and a red circle '5' around it, and the 'Sign' button with a red circle '6' around it.