



Student Guide to Epic for EHHOP

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Welcome

Hey there,

Thank you for volunteering with EHHOP!

Using Epic is an essential part of working as a senior EHHOP clinician. Until now, there has not been a centralized place to go for all of your Epic-related questions. Hopefully this guide fills that gap, and shows you how to accomplish basic clinic-related tasks, whether you are a Senior Clinician volunteering once in clinic, Chronic Care Senior, or Teaching Senior.

Follow the red boxes throughout this guide for easy-to-follow images that correlate with written instructions about navigating Epic when caring for EHHOP patients.

It is my hope that this document grows and improves with time, so please be in touch about how this can be changed so it is the best it can be for you, EHHOP's awesome student volunteers.

Happy EHHOP-ing!

Allison Vise

EHHOP Student Education Chair, 2017-2018

Epic access

1) Go to <https://chief.mssm.edu>:

Chief
Ticketing & Account Management

Log in with your Network ID.

Network ID ex. smithj01

Password

Log in

[Reset your Network ID password](#)

Warning

- Unauthorized use, possession, duplication, or tampering with Mount Sinai Medical Center computers, data, information programs or services is a violation of policy and a criminal offense.
- Violators are subject to dismissal and/or prosecution.

2) Once logged on, click Accounts at the top of the screen. It will take you to this page:

Accounts Logout

CHIEF

Your account information

Wireless access information

This is your school AD account (not email account).

SSID MSSMC-green
Login ID MSSMCAMPUS\visae01

Blackboard access information

This is your school AD account (not email account).

Directory name MSSMCAMPUS
Login ID visae01

Your currently logged on account

This is your school AD account (not email account).

Directory name MSSMCAMPUS
Login ID visae01
Name Allison Vise
Mail allison.vise@icahn.mssm.edu
Status active
Password expiration 2017-05-04 [Change password](#)

Other accounts

This is your hospital network logon.

Directory name MSNYU-HEALTH
Login ID visae01
Name Allison Vise
Mail Not configured for this account
Status active
Password expiration 2017-05-04 [Change password](#)

This is your Chpnet account.

Directory name CHPNET
Login ID visae01
Name Allison Vise
Mail Not configured for this account
Status
Password expiration [Change password](#)

3) Check that your MSNYUHEALTH login is Active (red above). If it is not, reset your password.

Note: Call 4-EPIC from any hospital phone for Epic help from a real, live IT helpdesk employee!

Opening Epic (for on campus computers)

Open the Citrix Desktop. Double click on Epic Production (Epic PlayGround is for training purposes):

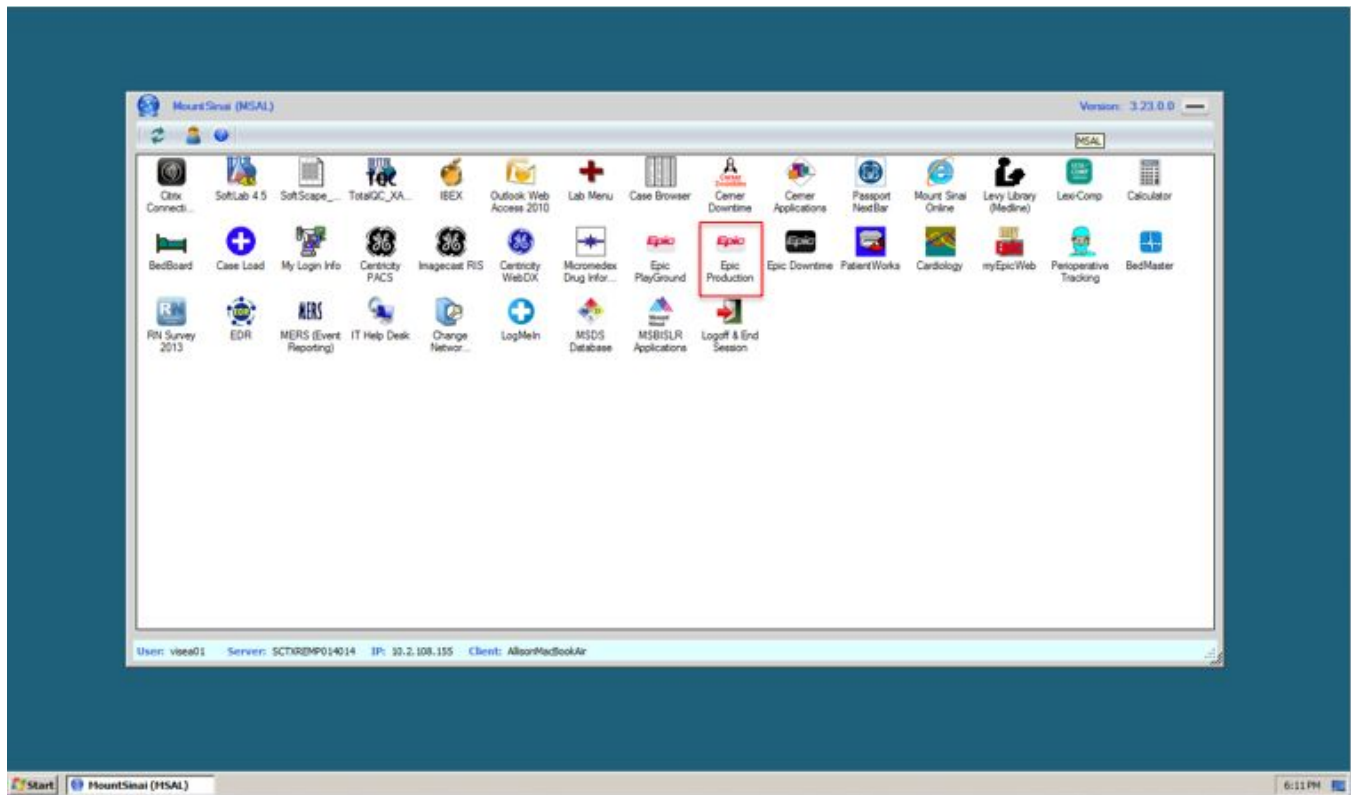
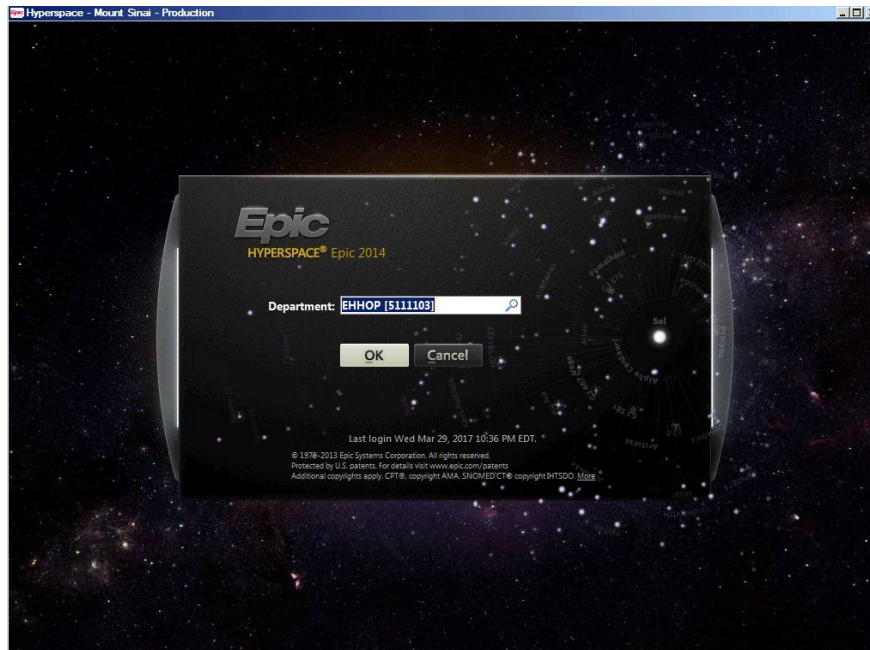


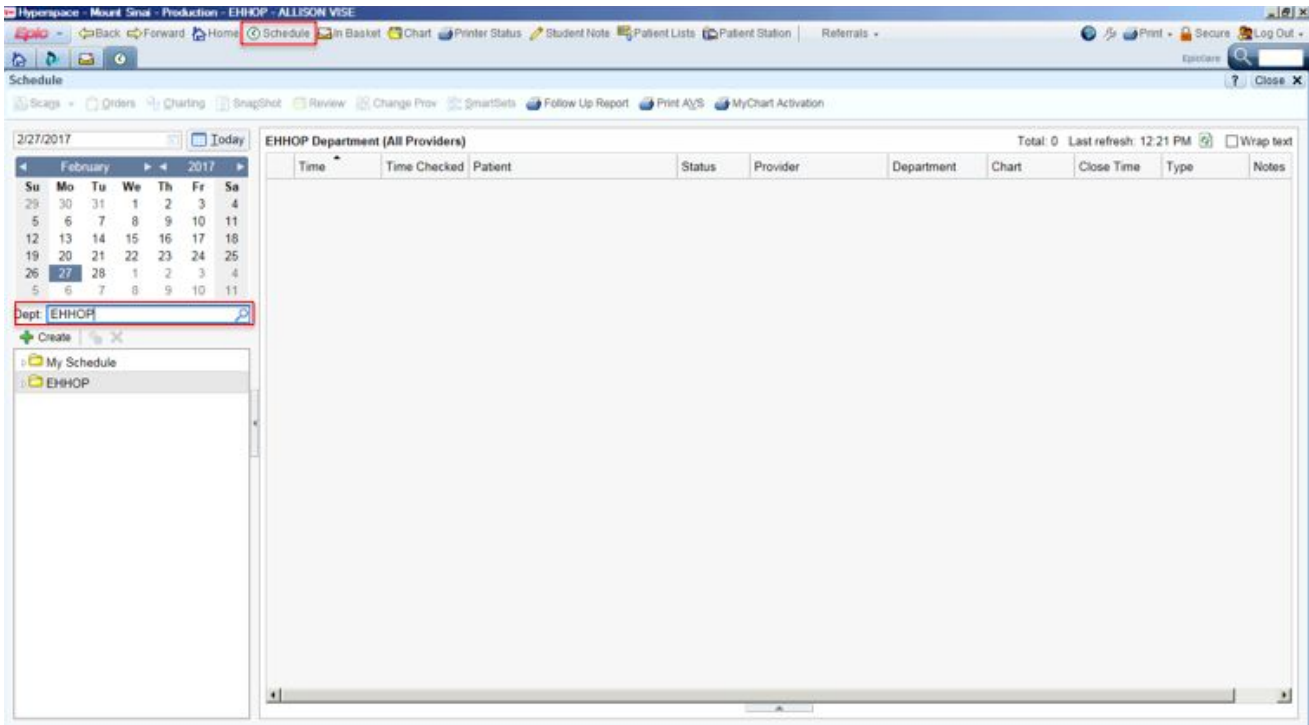
Chart reviewing

Prepare for your upcoming visit by reviewing your patient's Epic chart prior to seeing them in clinic. The Clinic Managers of the week will assign patients by Friday night so that you can chart review prior to clinic.

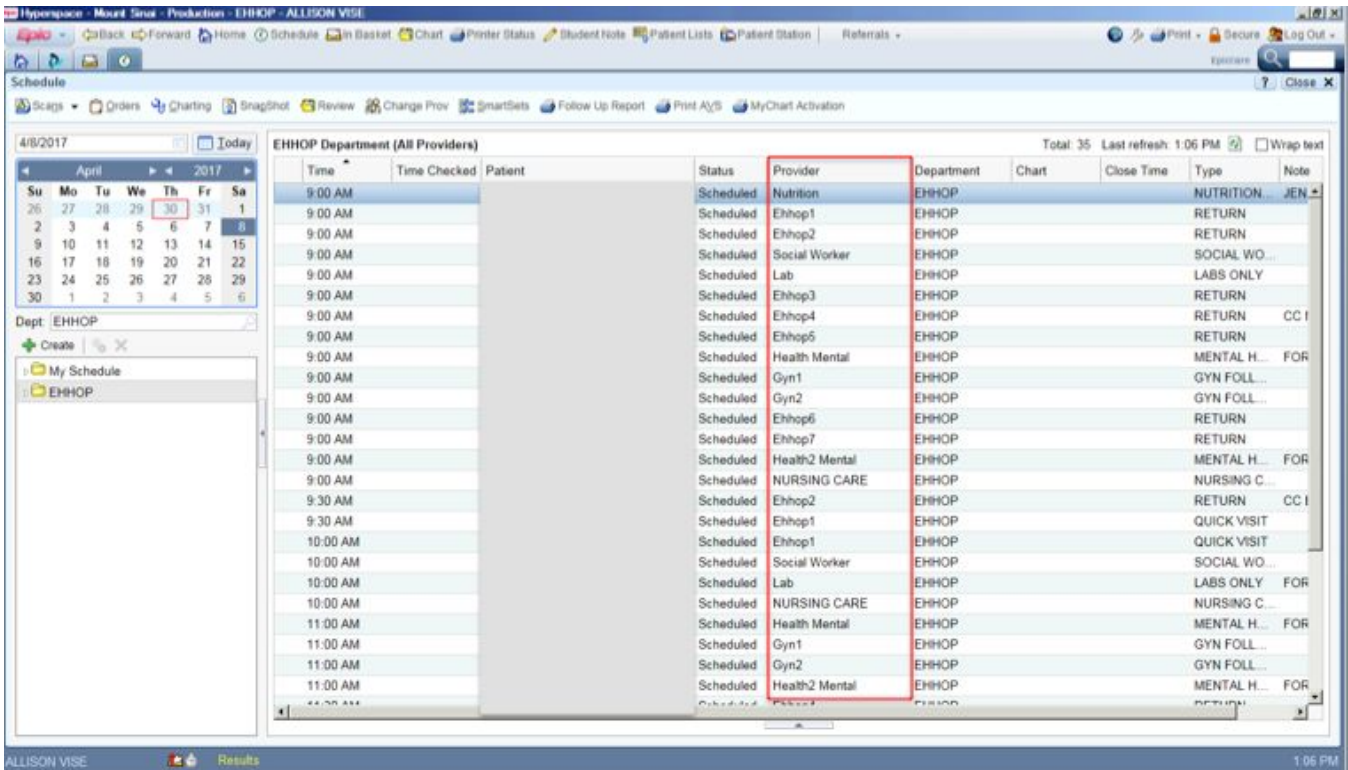
- 1) Log on to Epic. Assign EHHOP as the Department. If you cannot log on, call 4-HELP:



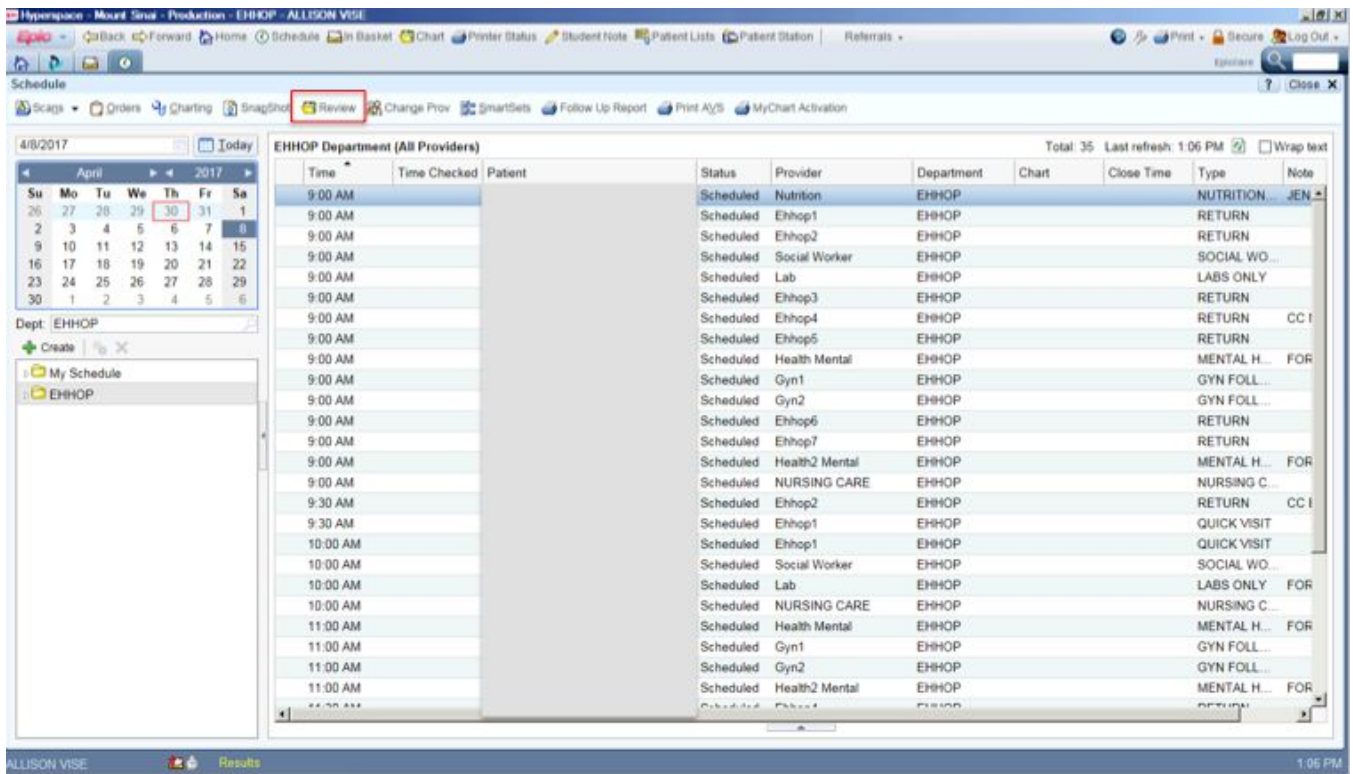
- 2) Click Schedule at the top of your screen. Enter EHHOP as the department:



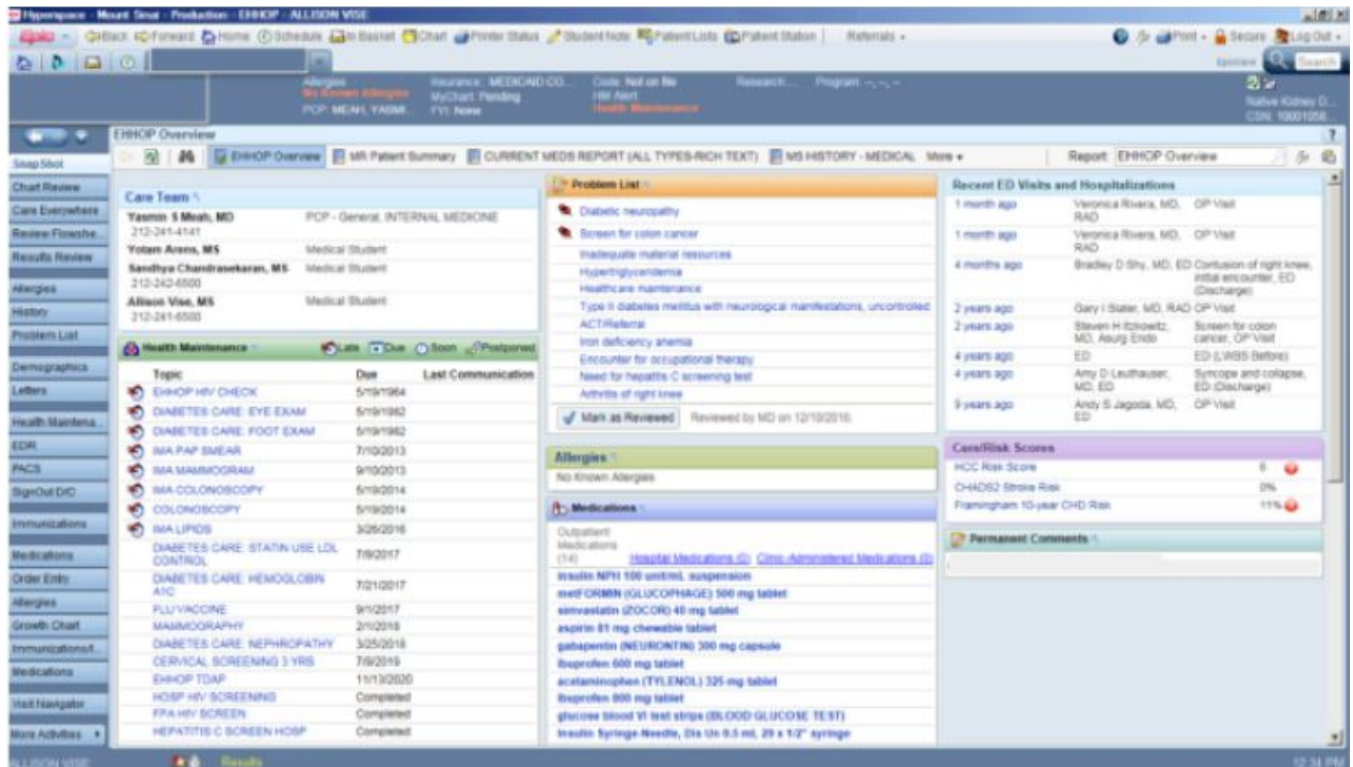
- 3) Select your clinic day on the calendar, and the clinic schedule will populate. Find your name under the Provider column. Patients who haven't yet been assigned will have "Ehhop1" or "Gyn1," etc. as their provider:



- 4) Select Review to open the patient's chart:



5) Review the patient's Snapshot page. Select EHHOP Overview for a comprehensive review:



- 6) Select Chart Review on the left side of the panel. This allows you to review the patient's Encounters, Notes, Medications, Imaging, etc., by selecting the appropriate tab from the top of your screen:

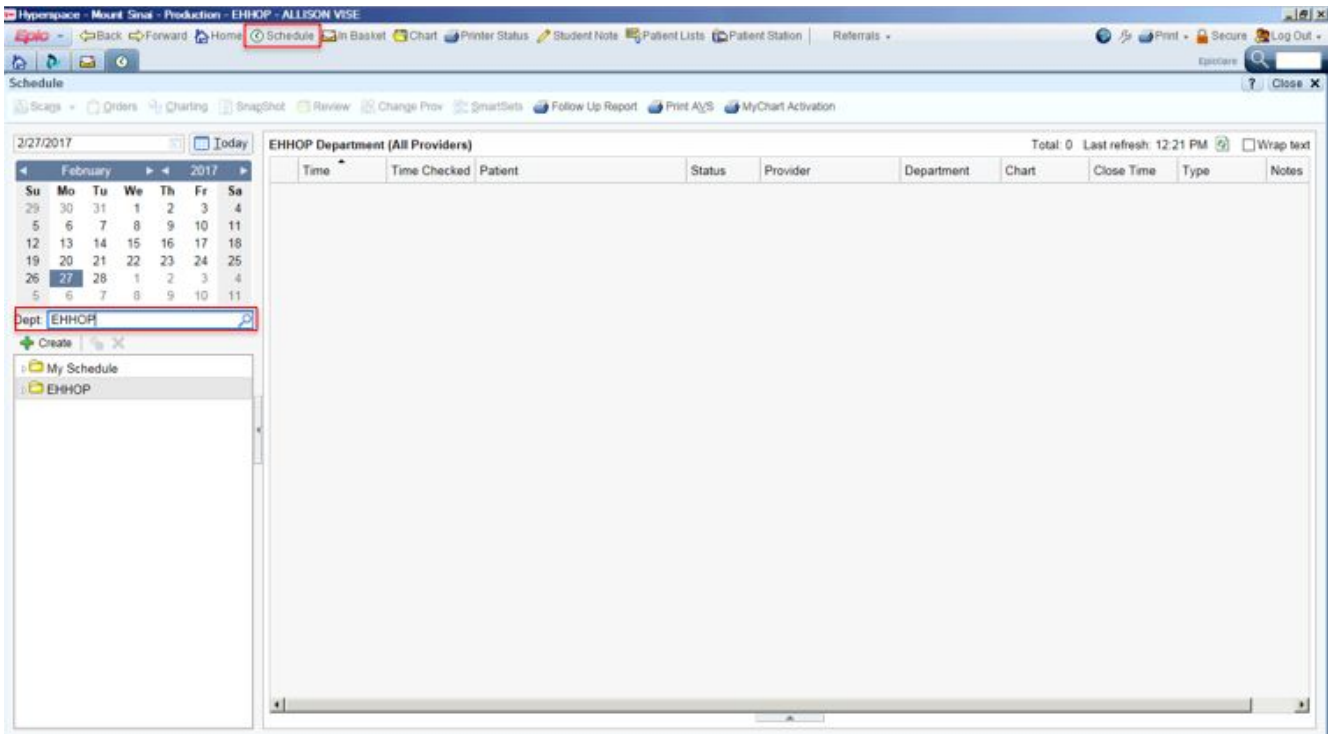
The screenshot shows the Epic EMR interface for a patient named Allison Wise. The 'Chart Review' window is open, displaying a list of encounters. The 'Encounters' tab is selected at the top. The table below shows the visit history:

Date	D/C Date	Type	Department	Provider	Reason for visit
03/29/2017		Miscellaneous	EHHOP	Meah, Yasmin S, MD	
03/28/2017		Telephone	EHHOP	Vise, Allison, MS	
03/25/2017		Student Note	EHHOP	Vise, Allison, MS	
03/25/2017		Office Visit	EHHOP	Chung, Andrew, MD	Uncontrolled type 2 diabetes mellitus with diabetic neuropathy, with long-term current use of insulin (Prima...
03/14/2017		Refill	EHHOP	Vise, Allison, MS	Uncontrolled type 2 diabetes mellitus with diabetic neuropathy, with long-term current use of insulin (Prima...
02/02/2017		Office Visit	HOSP ORTHOPEDICS	Loy, Andrew, MD	Arthritis of right knee (Primary Dx)
02/01/2017	3/20/2017	OP Visit	RADIOLOGY	Rivera, Veronica, MD	
02/01/2017	2/1/2017	OP Visit	RADIOLOGY	Rivera, Veronica, MD	
01/31/2017		Telephone	EHHOP	Vise, Allison, MS	
01/26/2017		Office Visit	HOSP ORTHOPEDICS	Meier, Kristen M, MD	Knee pain, unspecified chronicity, unspecified laterality (Primary Dx)
01/21/2017		Nutrition	EHHOP	Cholewka, Jennifer, RD	
01/21/2017		Student Note	EHHOP	Rifkin, Robert A, MS	
01/21/2017		Office Visit	EHHOP	Rivera, Veronica, MD	Uncontrolled type 2 diabetes mellitus with diabetic neuropathy, with long-term current use of insulin (Prima...
01/18/2017		Telephone	EHHOP	Vise, Allison, MS	
01/11/2017		Telephone	EHHOP	Vise, Allison, MS	Arthralgia of right knee (Primary Dx)
01/11/2017		Student Note	EHHOP	Vise, Allison, MS	Arthralgia of right knee (Primary Dx)
01/10/2017		Telephone	EHHOP	Vise, Allison, MS	Pain in joint, multiple sites (Primary Dx)
01/06/2017		Telephone	EHHOP	Vise, Allison, MS	
12/15/2016		Telephone	MS IAM SLR ROOSEV...	Vise, Allison, MS	Effusion of right knee joint (Primary Dx)
12/11/2016		Student Note	EHHOP	Parvin-Nejad, Fatemeh, MS	
12/11/2016		Student Note	EHHOP	Parvin-Nejad, Fatemeh, MS	
12/10/2016		Student Note	EHHOP	Meah, Yasmin S, MD	
12/10/2016		Office Visit	EHHOPEHHOP	Ehhop4, Parvin-Nejad, Fateme...	Arthritis of right knee (Primary Dx), Uncontrolled type 2 diabetes mellitus with diabetic neuropathy, with lon...
12/09/2016		Telephone	EHHOP	Vise, Allison, MS	
12/04/2016		Student Note	EHHOP	Mo, Shelley, MS	
12/04/2016		EHHOP OPH...	EHHOP	Chadha, Nisha, MD	Established Patient / Chronic Problem - annual diabetic eye exam
12/01/2016		Telephone	EHHOP	Vise, Allison, MS	

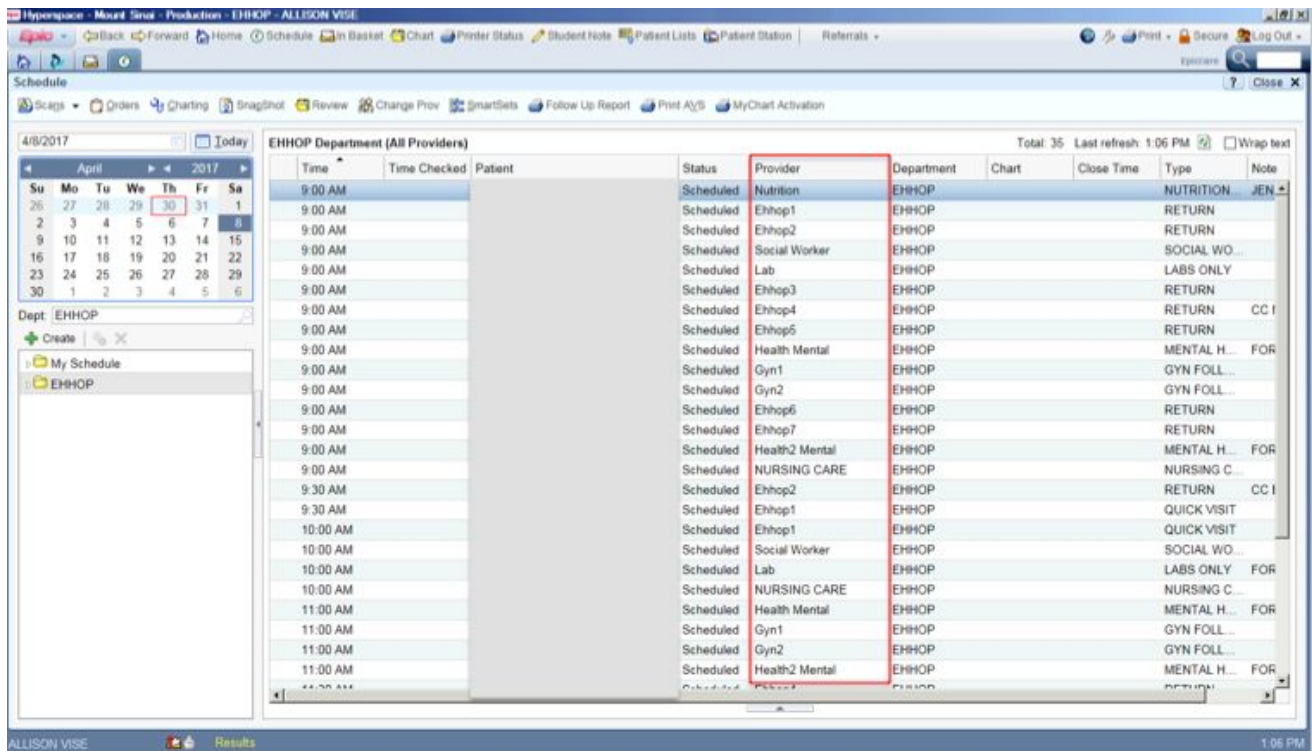
Beginning your visit

As described above under "Chart reviewing":

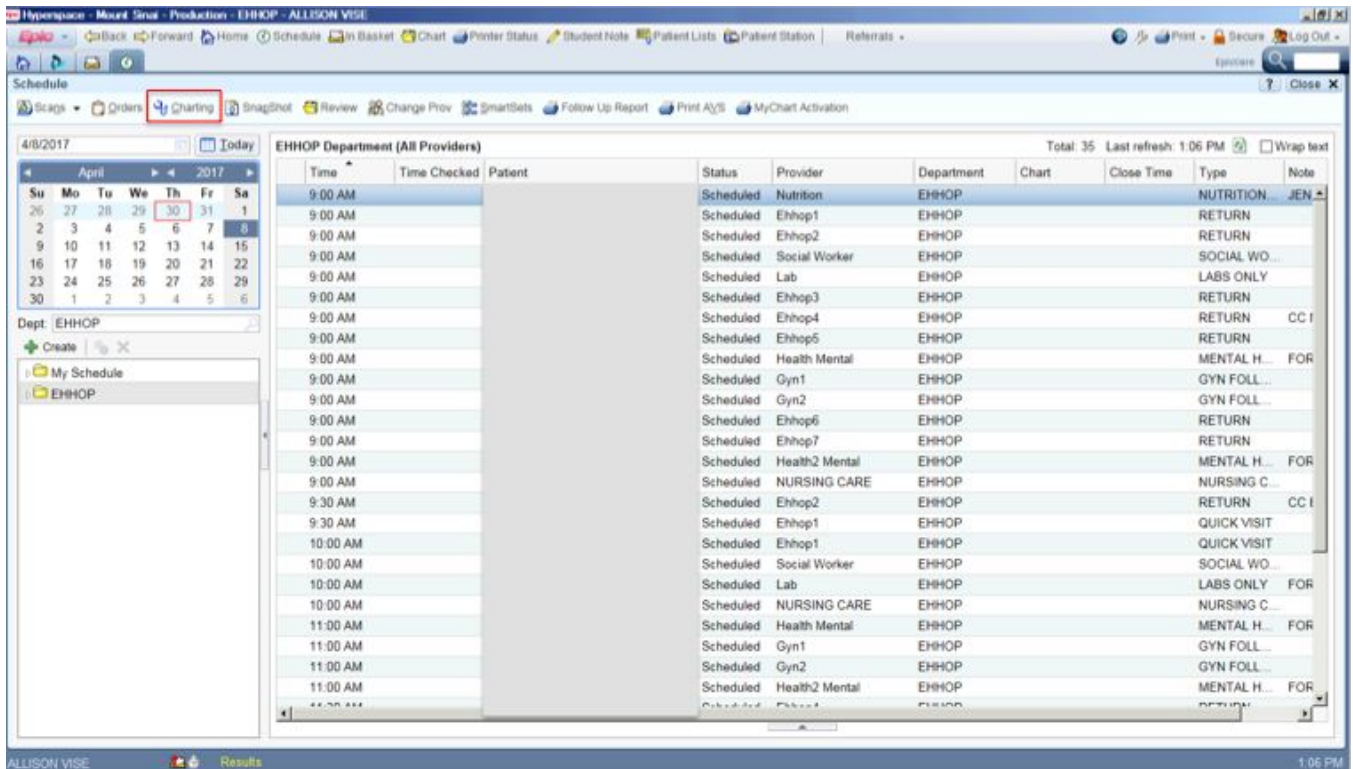
- 1) Go to Schedule on the top of your screen. Enter EHHOP as the department:



2) Select your clinic day from the calendar, and the clinic schedule will populate. Find your name under the Provider column:



3) Once your patient has been marked as "Arrived," select Charting from the top menu bar, or double click on your patient's name, and then begin your visit:



Keep in mind that when you are done with your visit and begin precepting with an attending, **you should have them assign themselves as the Provider** under the Schedule tab by right clicking on the Provider name for the patient you are discussing with them.

Also, be sure to update the Call Sheet or tell the Clinic Managers (CMs) when you get your patient, need to precept with an attending, or any other shifts from room-to-room for you or your patient over the course of the clinic day.

Visit Navigator

Once you open the patient's visit for the day via the Schedule (see above), the Visit Navigator appears:

The screenshot shows the Epic Visit Navigator interface. The left sidebar contains a navigation menu with options like Chart Review, Care Everywhere, Review Flowcharts, Results Review, Allergies, History, Problem List, Demographics, Letters, Health Maintenance, EDR, PACS, SignOut/DIC, Immunizations, Medications, Order Entry, Allergies, Growth Chart, Immunizations, Medications, Visit Navigator, and More Activities. The main content area is titled "3/25/2017 visit with Andrew Chung, MD for RETURN - CC ALLISON VISE". It features several tabs: "Best Practice Advisories" (refreshed 3/30/2017), "Care Everywhere Outside Records (View Only)" (showing Institute For Family Health), "Reason for Visit" (None), and "Vitals" (New Reading, File All Data). The Vitals tab displays a table of vital signs for five office visits from 2016.

	Office Visit from 7/9/2016 in East Harlem Health Outreach Partnership 07/09/16 1300	Office Visit from 7/30/2016 in East Harlem Health Outreach Partnership 07/31/16 0800	Office Visit from 9/10/2016 in East Harlem Health Outreach Partnership 09/10/16 1120	Office Visit from 10/15/2016 in East Harlem Health Outreach Partnership 10/15/16 1158	Office Visit from 10/15/2016 in East Harlem Health Outreach Partnership 10/15/16 1313	
Vitals						
BP	125/70	140/72	108/62	109/57	122/78	
Pulse	78	80	72		72	
Site	Right Arm	Left Arm	Left Arm	Left Arm	Right Arm	
Cuff Size	Regular	Regular	Regular	Regular	Regular	
BP Position	Sitting	Sitting	Sitting	Sitting	Sitting	
Temp						
Temp site						
Resp	18	18			20	
SpO2						
Peak Flow						
Height	4' 11.25" (150.5 cm)		4' 8.3" (143 cm)			
	68.72 kg (151 lb 8)		75.7 kg (166 lb 14.2)			

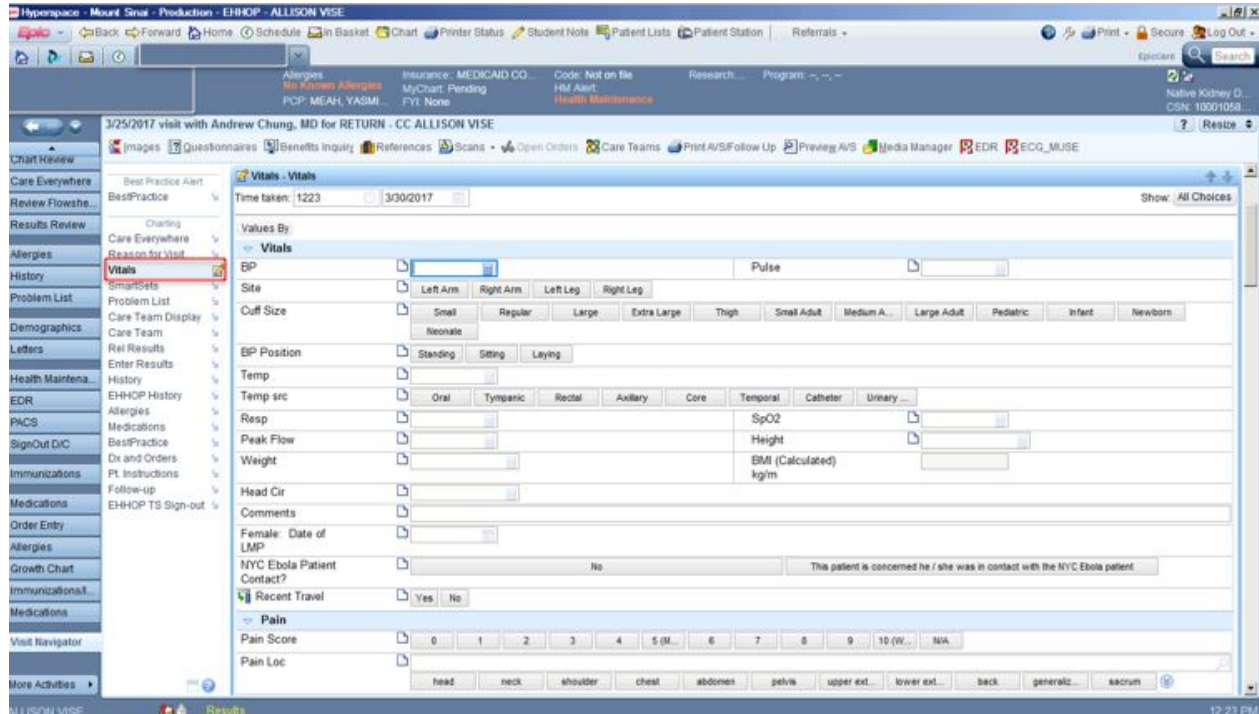
The Visit Navigator is your home base for recording all of the essential components of your clinic visit, including recording vital signs, reviewing allergies and medications, updating the patient's medical history, placing orders for medications and certain referrals, and writing patient instructions.

Details on each of the most important parts of the Visit Navigator follow on the next few pages - read on!

Entering and reviewing vital signs

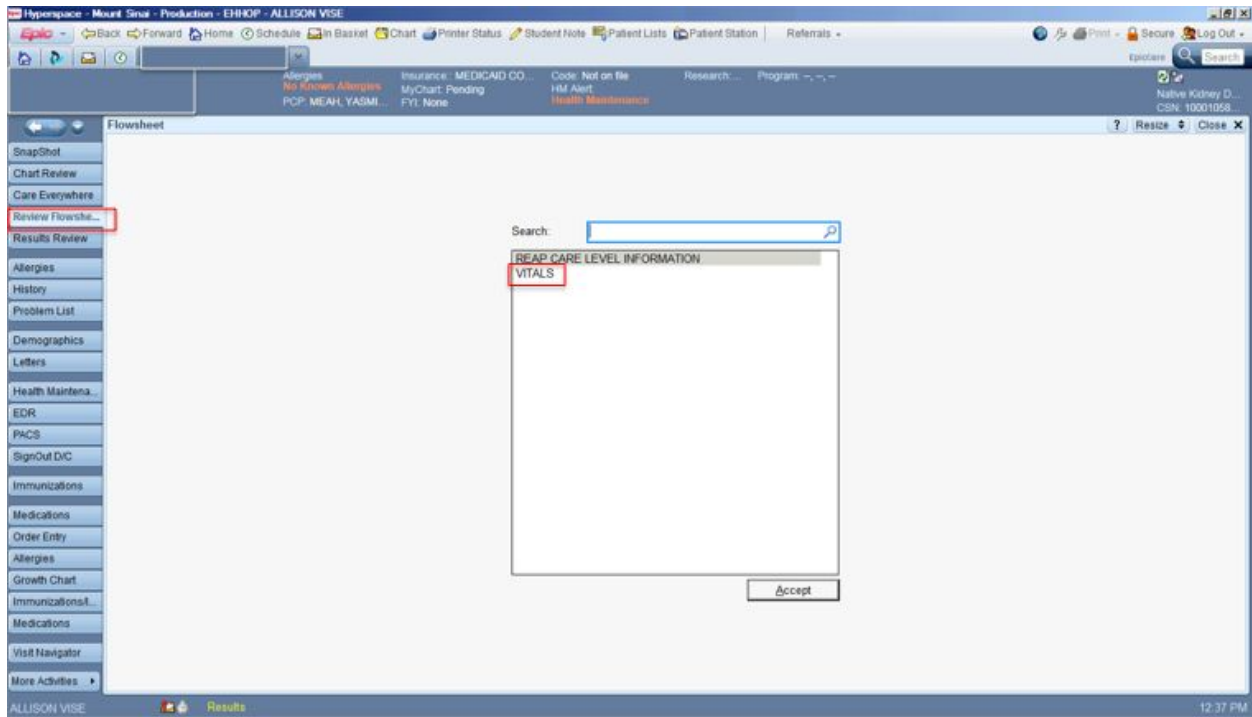
Entering vital signs:

- 1) From the Visit Navigator, select Vitals. Enter Vital Signs. Select Close (scroll down, on the bottom left) to save the new set of vitals:



Reviewing prior visits' vital signs:

- 1) Select Review Flowsheet from the lefthand column. Type in and/or select Vitals:



2) The following flowsheet will populate, showing you all past vital signs:

VITALS	3/21/2015	3/21/2015	3/21/2015	6/13/2015	6/13/2015	9/12/2015	12/5/2015	3/12/2016	7/9/2016	7/31/2016	9/10/2016	10/15/2016	11/29/2016	1/26/2017	2/2/2017	3/25/2017
BP		108/62	108/62	100/62	100/62	110/60	114/70	115/70	125/70	140/72	108/62	109/57	123/68	119/64	137/68	122/78
Pulse			76	75	79	76	76	80	78	80	72		70	65	70	72
Site			Left Arm		Left Arm	Right Arm	Right Arm	Right Arm	Right Arm	Left Arm	Left Arm	Left Arm		Right Arm	Right Arm	Right Arm
BP Position					Sitting			Sitting	Sitting	Sitting	Sitting	Sitting		Sitting	Sitting	Sitting
Temp						10	16	18	18	18			97	97.5	97	
Resp								14	18	18			18	18	18	20
SpO2				98	99								98			
Height					61 in	61 in	61 in	61 in	59 in			56 in		56 in	56 in	
Weight	165 lbs	165 lbs		168 lbs	168 lbs	149 lbs	163 lbs	164 lbs	151 lbs 8 oz	161 lbs		166 lbs 14 oz		165 lbs	165 lbs	156 lbs 8 oz
Comments																
BMI (Calculated) kg/m					31.8	28.2	30.9	31	30.4			37.1		37.1	37.1	

Trending labs

Trending labs is a great way to monitor a patient's progress over time.

1) Select Results Review from the left-hand column:

The screenshot shows the Epic EHR interface. The search bar at the top left contains 'HEMOGLOBIN A1C'. The left-hand column has 'Results Review' selected. The main area displays a table of lab results for Hemoglobin A1C over five dates: 1/11/2014 (1707), 9/13/2014 (1550), 12/13/2014 (1443), 2/1/2015 (0627), and 7/28/2015 (0518). The table is titled 'OTHER COMMON' and has columns for dates and values. The values are 1707, 1550, 1443, 0627, and 0518. The table also shows a trend line with arrows indicating the direction of change.

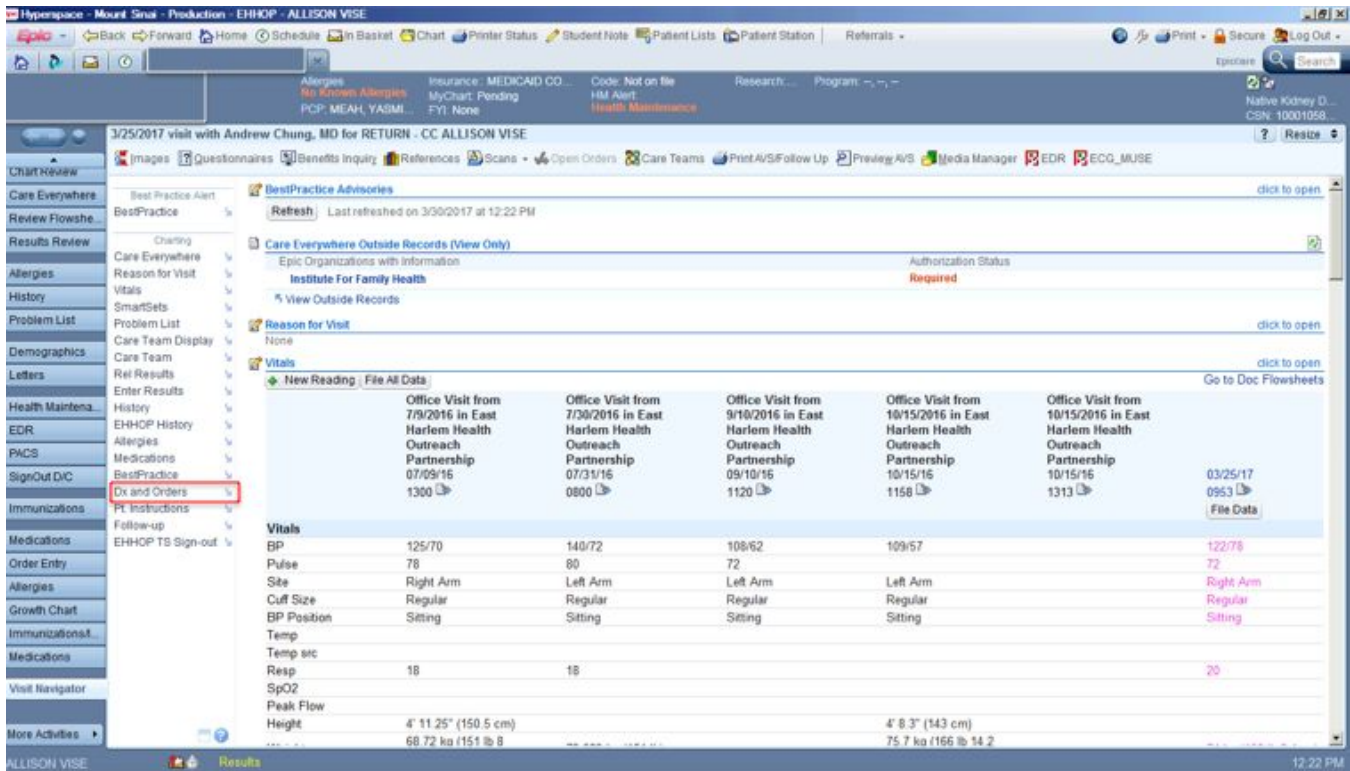
DATE	1/11/2014	9/13/2014	12/13/2014	2/1/2015	7/28/2015
HEMOGLOBIN A1C	1707	1550	1443	0627	0518

2) Search for the lab you want to trend, i.e. Hemoglobin A1C, or select it from the drop down menu. Voila!

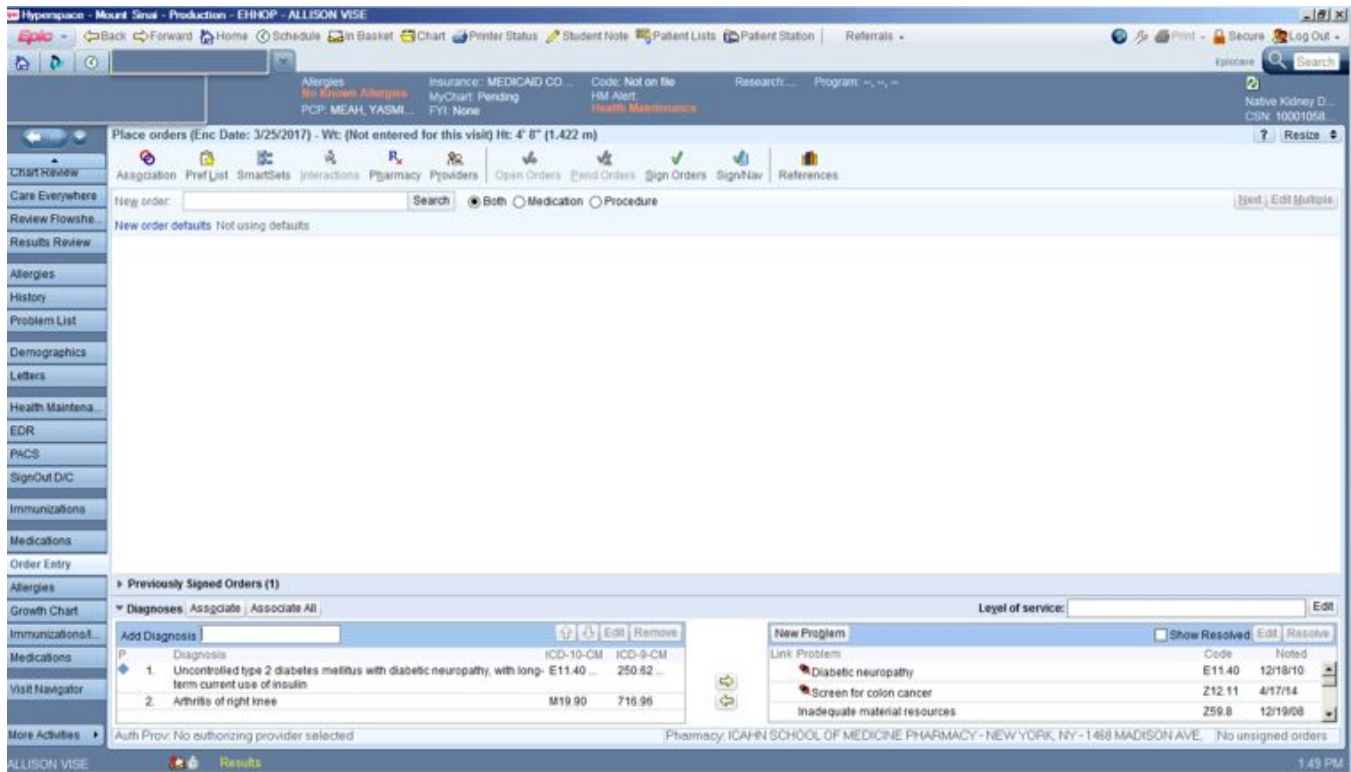
Pro tip: If you want to include your patient's trended vital signs or a particular lab value over several clinic visits (i.e. trending BP, Hgb A1C, etc.,) in your Student Note, you can select several columns of data displayed in the Results Review tab by holding Shift+selecting the columns. Then copy/paste the data into the Objective section of your Student Note for the day.

Pending medications and orders (in clinic)

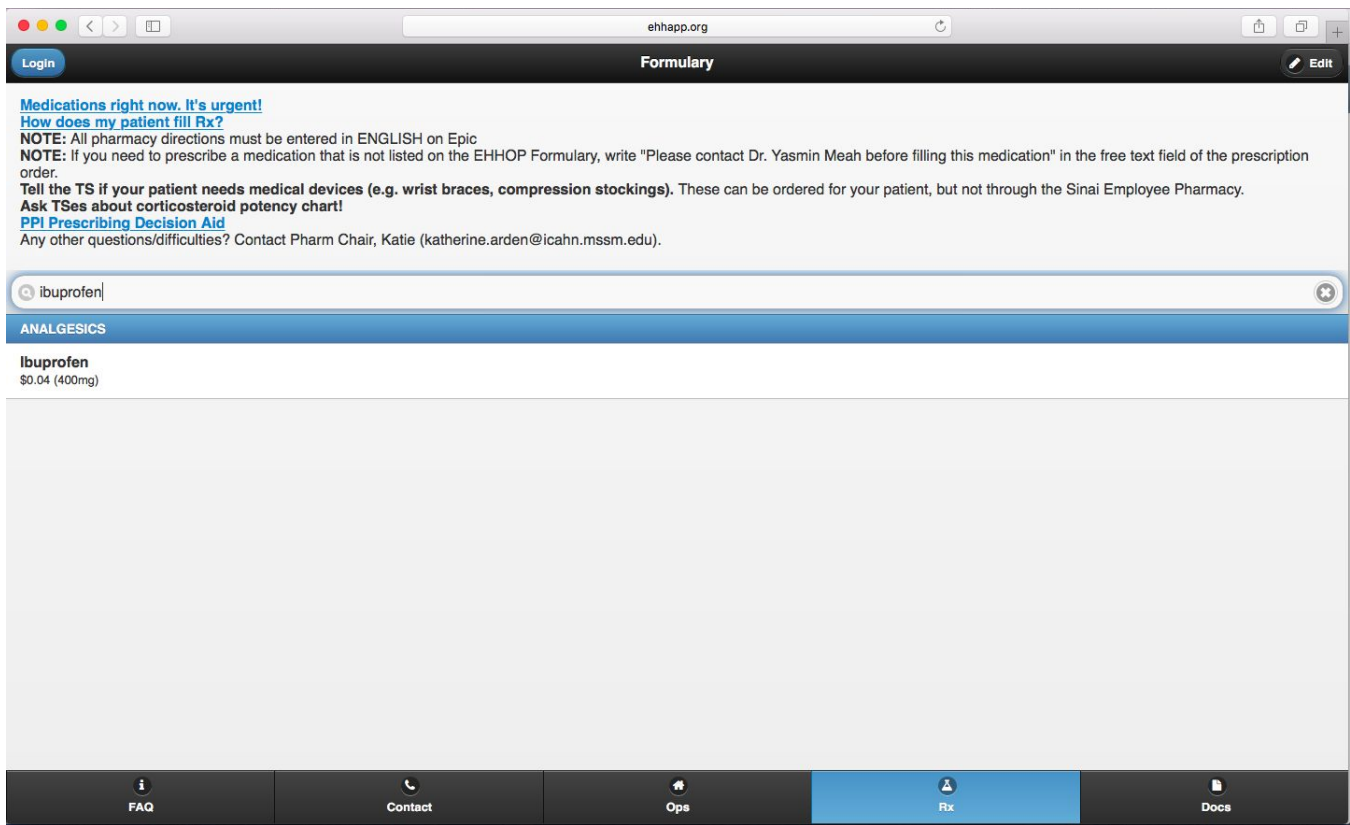
1) Select Dx and Orders from the Visit Navigator:



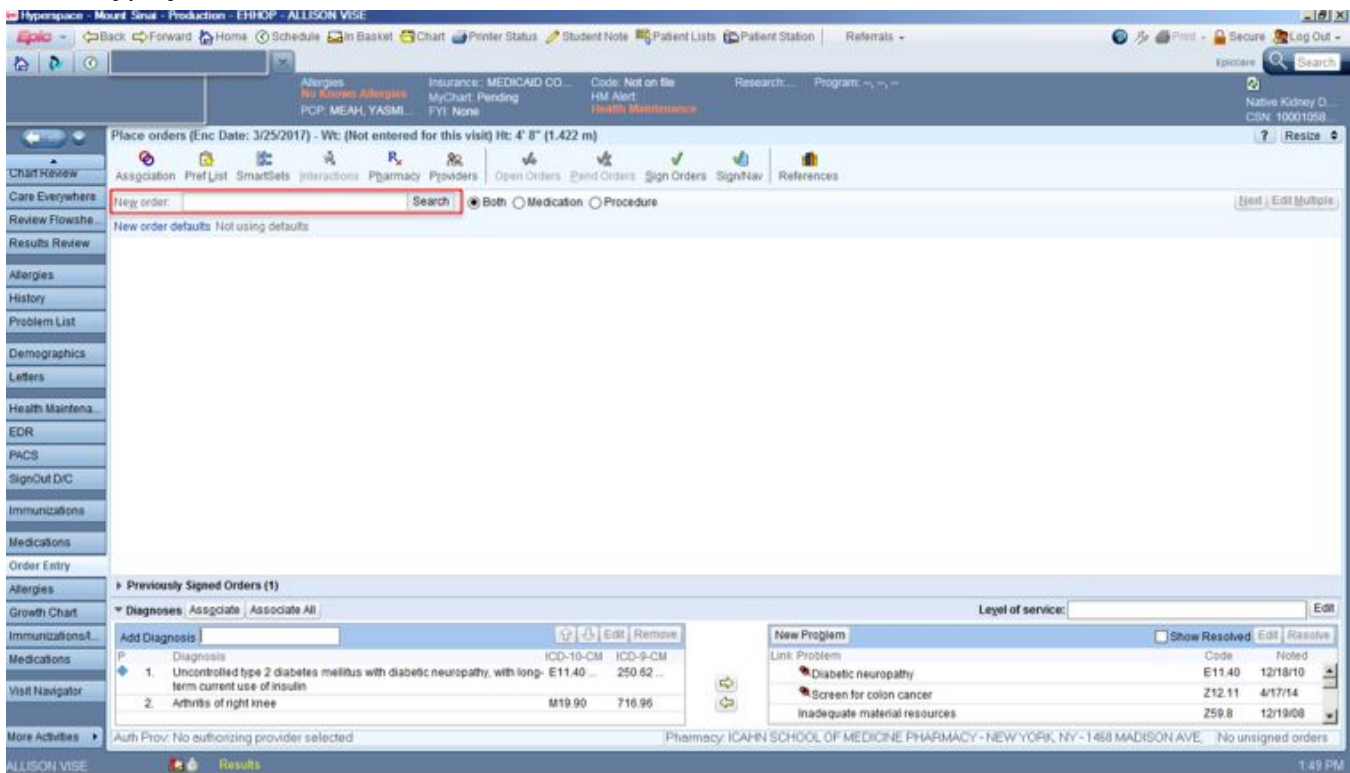
A screen will open that looks like this:



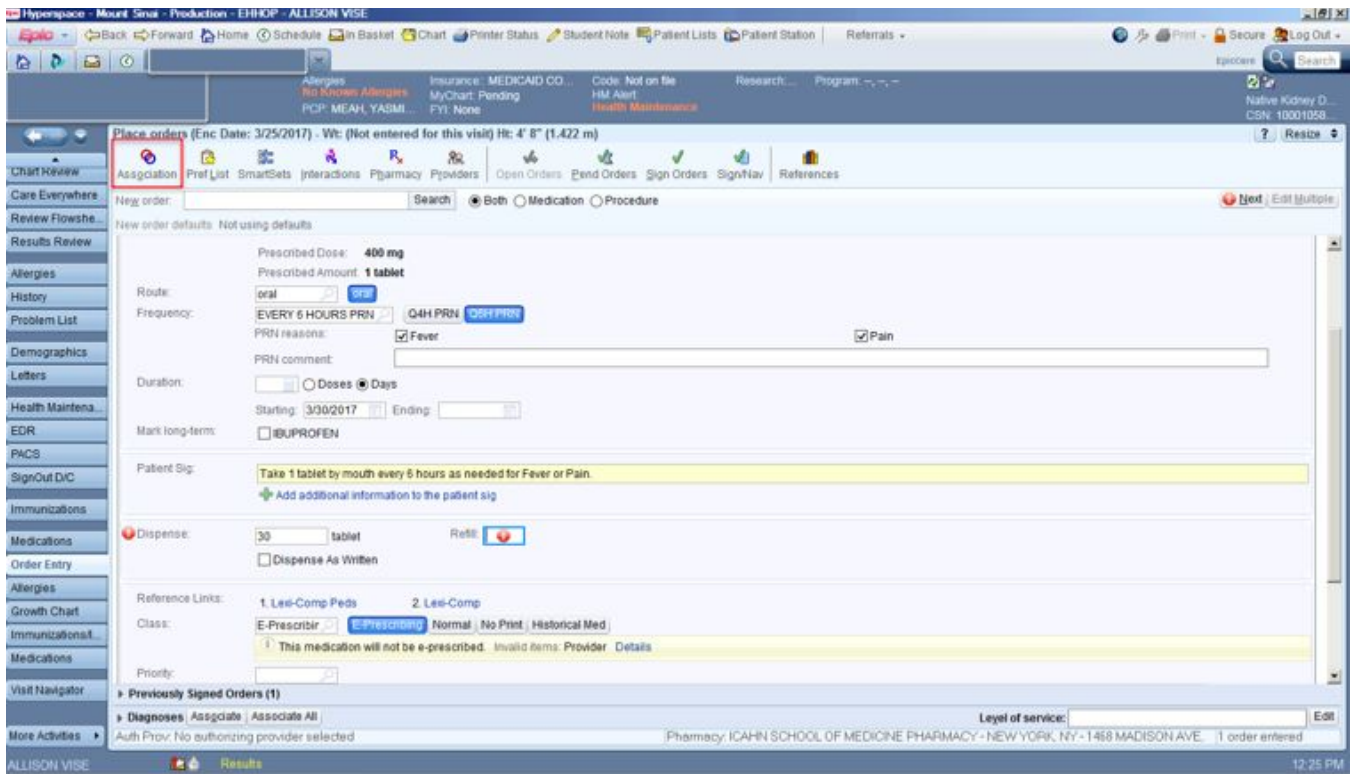
- 2) For medications, check the EHHOP formulary on the EHHAPP (ehhapp.org -> Rx at the bottom of the screen -> type in the name of the medication) to make sure that you are prescribing a medication on the EHHOP formulary (if a medication is not on the formulary, or requires a PDAP, discuss this with your Teaching Senior):



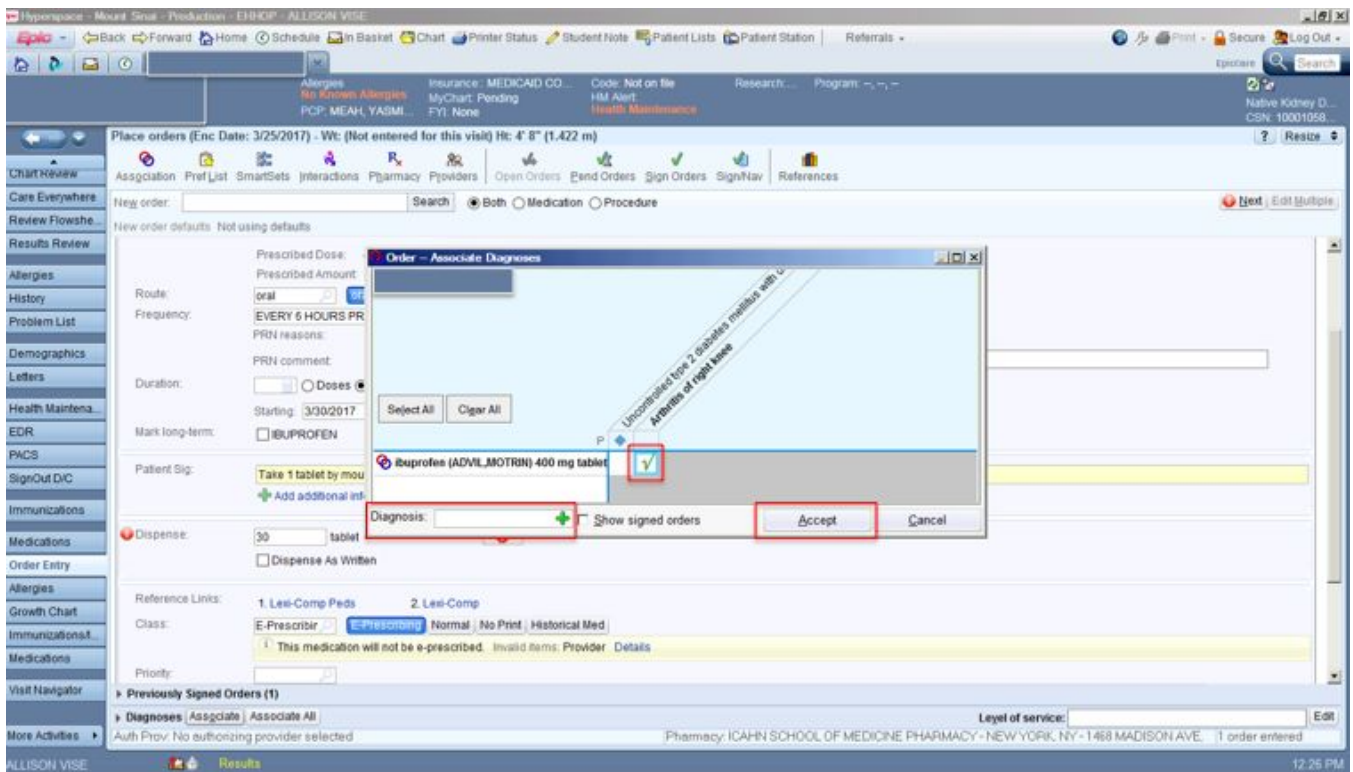
3) Type your desired order in the New Orders bar, and click Search:



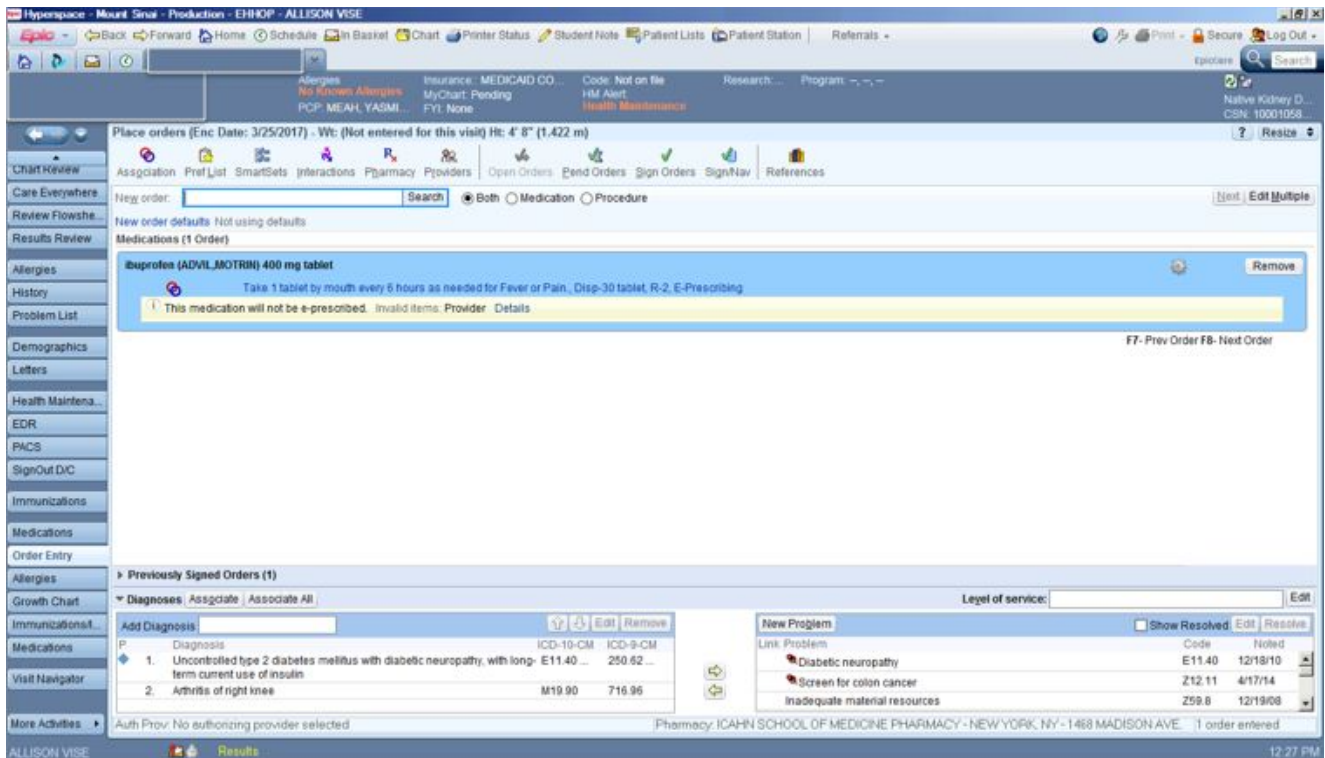
4) Fill out the medication order. Associate the order with a diagnosis by clicking Association:



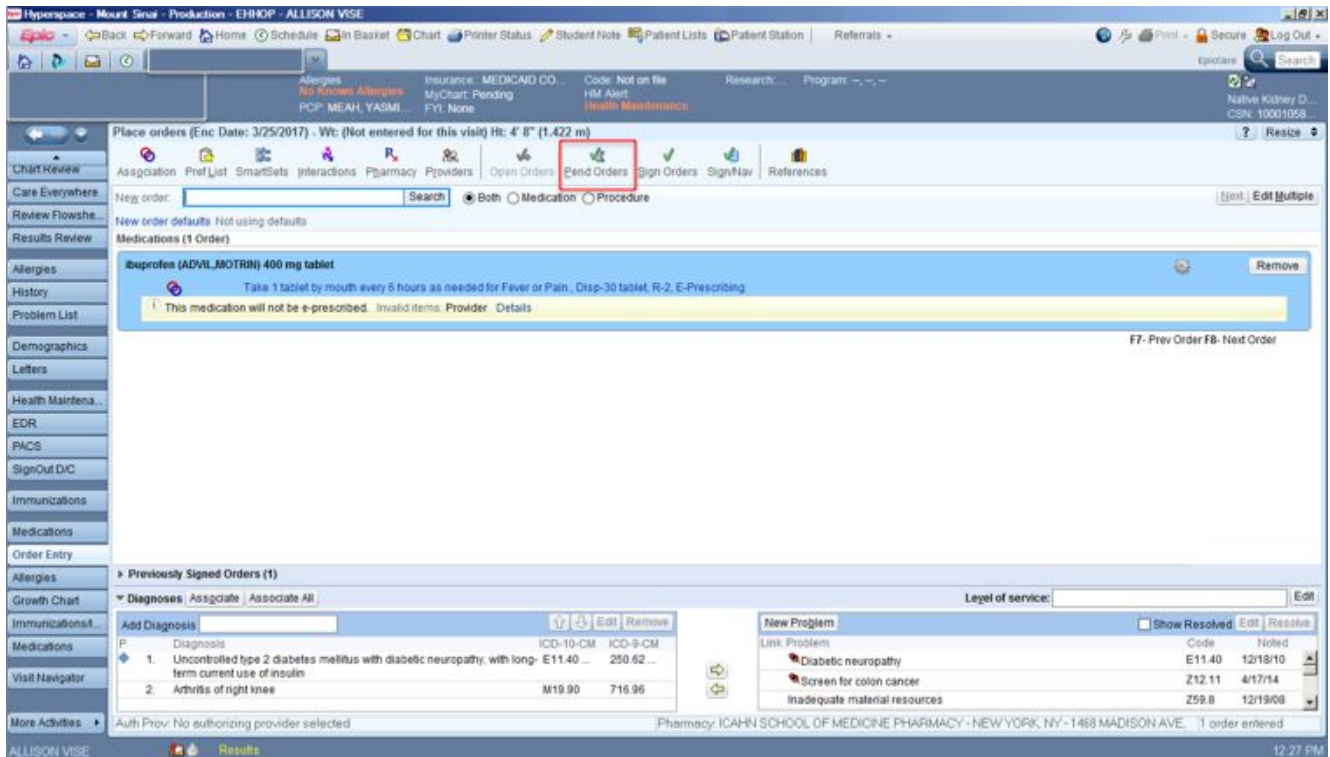
- 5) Enter the proper diagnosis, and click the white box in the row of the medication corresponding to the column of the diagnosis. A green checkmark will appear. Click Accept when you have finished associating all medications and diagnoses:



The pending medications will look like this:



- When you are done entering orders, select Pend Orders. The attending MD will sign the orders after you precept with them:



7) Make sure the Icahn School of Medicine Pharmacy is listed as the pharmacy!

Note: You must have closed the patient's chart on your Epic in order for the MD to be able to sign the orders. The order will be locked out from appearing in the MD's Epic if you also have the patient's chart open under your login!

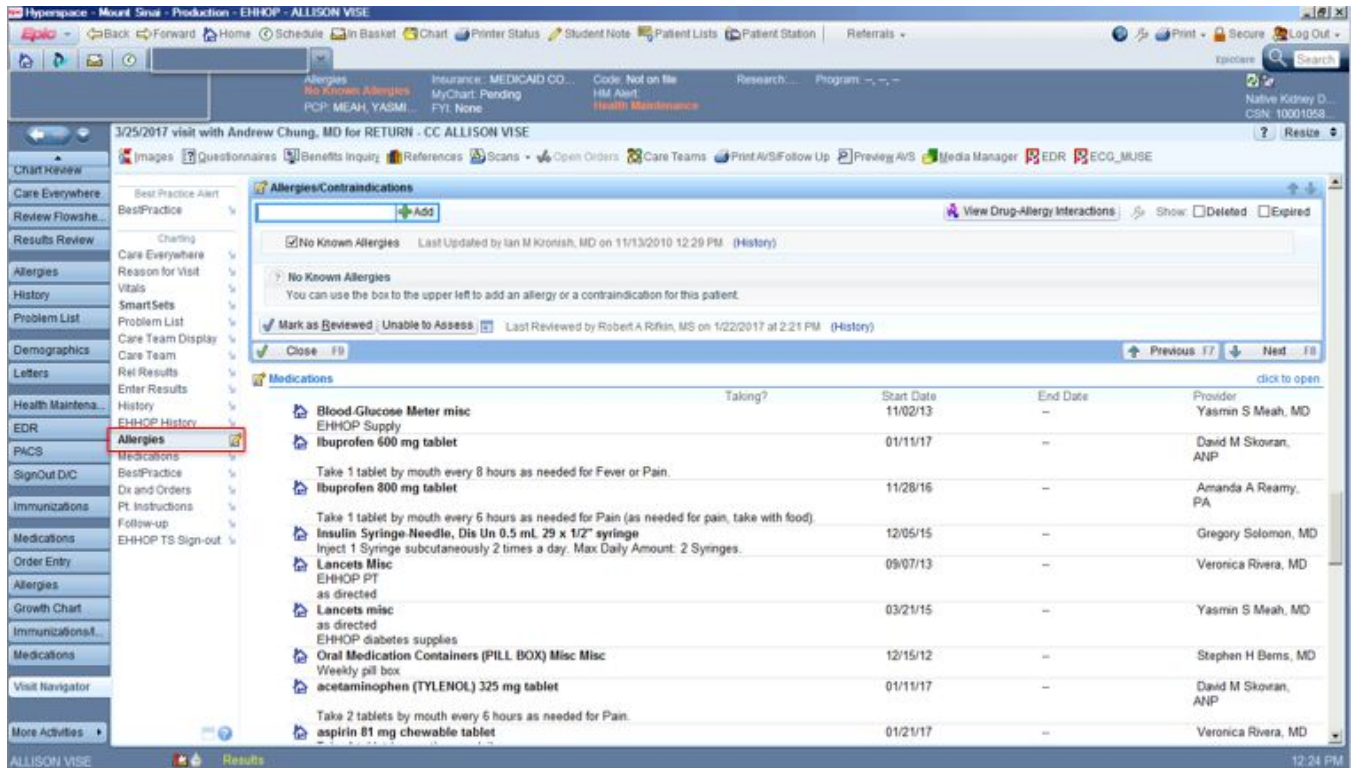
8) Click "reviewed" on Medications and on Allergies

9) Repeat the same process for Orders (i.e. referrals) the patient needs. Follow the instructions on the EHHAPP for which referrals require Epic orders.

Reviewing allergies

Always verify your patient's allergies and if anything has changed since their last visit to EHHOP:

1) From the Visit Navigator, select Allergies:



2) Add any new allergies, click Mark as Reviewed, and then select Close.

Medication reconciliation

Every clinic visit should include a medication reconciliation. This is how we maintain an accurate list of what medications each patient is taking. This means going through each of the patient's documented medications with the patient, and verifying (1) if they are taking that medication (and removing the medication from their med list if they no longer need it), (2) what the dosage/frequency is, and (3) if they need refills, if it is a long-term prescription. Some patients will bring a pillbox or bottles in with them. The Mt. Sinai pharmacy will use this list to verify what medications a patient is supposed to be taking, so keeping this list current is very important!

- 1) From the Visit Navigator, select Medications on the left side of the screen. The following screen will populate:

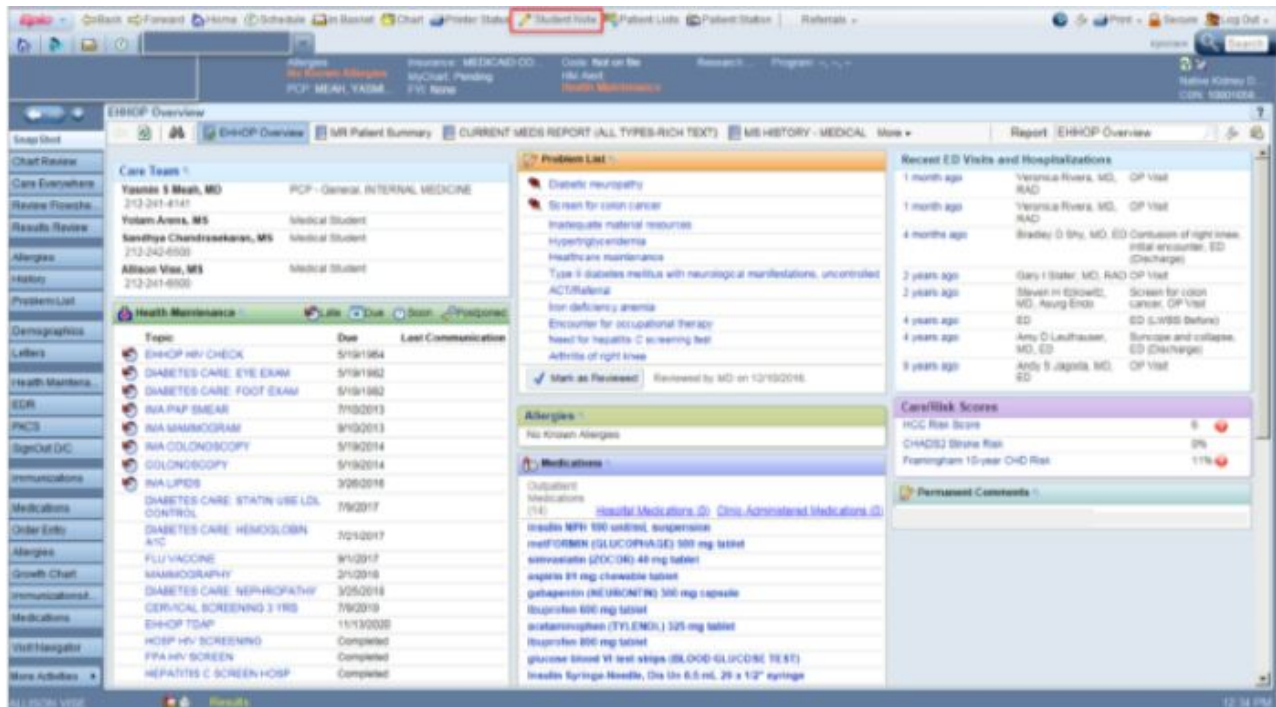
Medication	Sig	Disp	Refills	Start Date	Ord/Sold Date	End Date	DAW	Comment	DIC Rec
insulin NPH 100 unit/mL suspension	Take 40 units in the morning and 45 units in the evening	10 mL	3 ordered	3/14/2017			No		
metFORMIN (GLUCOPHAGE) 500 mg tablet	Take 2 tablets by mouth 2 times a day with meals	120 tablet	3 ordered	3/14/2017			No		
simvastatin (ZOCOR) 40 mg tablet	Take 1 tablet by mouth at bedtime	30 tablet	2 ordered	3/14/2017			No		
aspirin 81 mg chewable tablet	Take 1 tablet by mouth once daily	36 tablet	5 ordered	1/21/2017			No		
gabapentin (NEURONTIN) 300 mg capsule	Take 2 capsules by mouth at bedtime	60 capsule	2 ordered	1/21/2017			No		
ibuprofen 600 mg tablet	Take 1 tablet by mouth every 8 hours as needed for Fever or Pain.	30 tablet	1 ordered	1/11/2017			No		
acetaminophen (TYLENOL) 325 mg tablet	Take 2 tablets by mouth every 6 hours as needed for Pain	100 tablet	1 ordered	1/11/2017			No		
ibuprofen 800 mg tablet	Take 1 tablet by mouth every 6 hours as needed for Pain (as needed for pain, take with food)	15 tablet	0 ordered	11/28/2016			No		
glucose blood VI test strips (BLOOD GLUCOSE TEST)	EHHOP Diabetes Supply	100 each	1 ordered	10/15/2016			No		

- 2) Go through each medication with your patient, verifying the name of the medication, the dosage, and the instructions for administration.
- 3) Use the toolbar at the top of the screen to reorder medications, discontinue medications the patient is not taking, and to mark medications as reviewed.

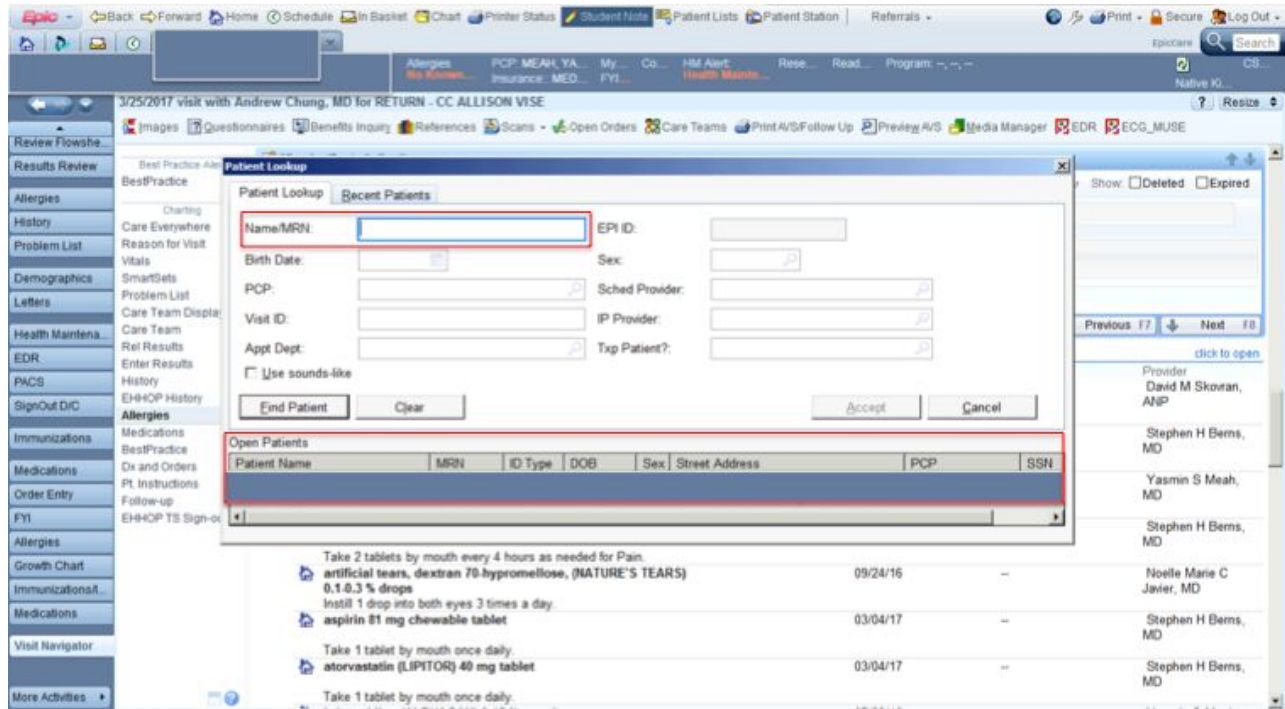
Writing a Student Note

Students should use the Student Note feature to write their progress note. This is a special type of note, just for EHHOP.

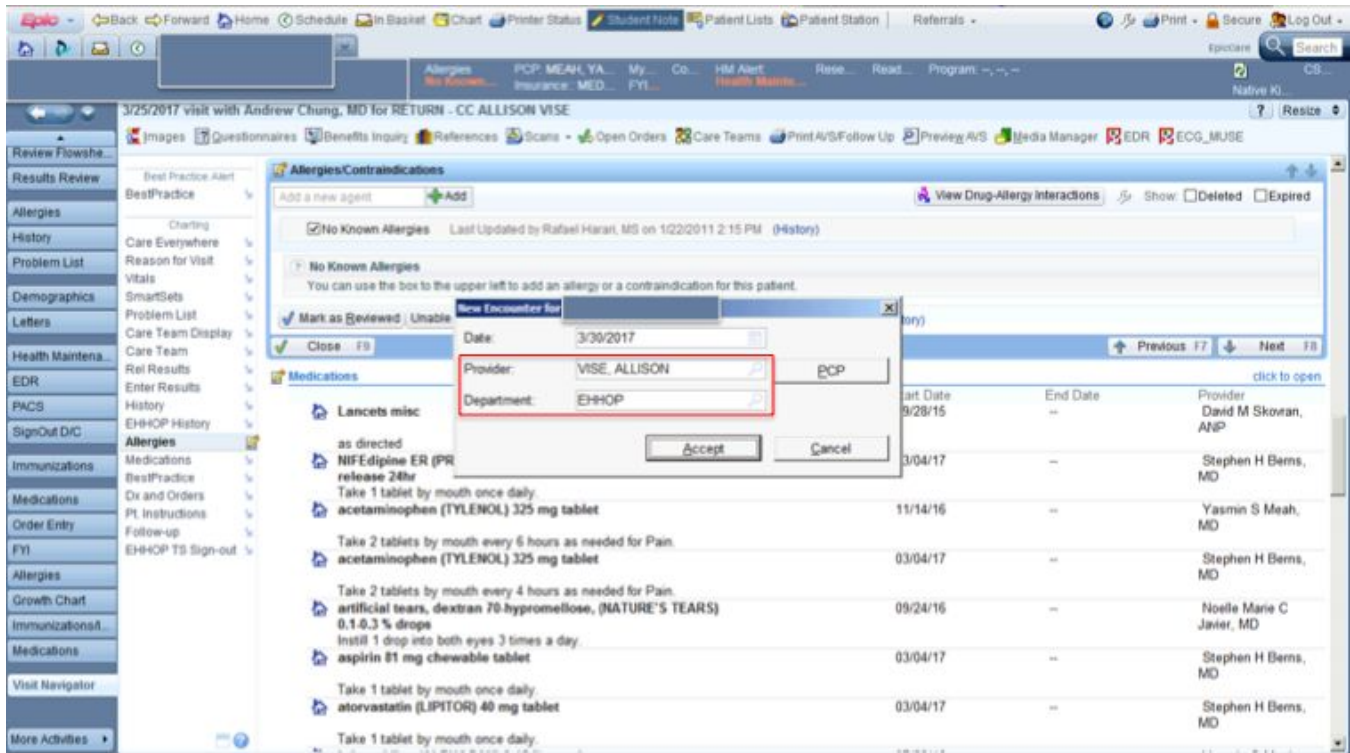
- 1) Make sure that you are in the EHHOP context. Select Student Note from the top of the screen:



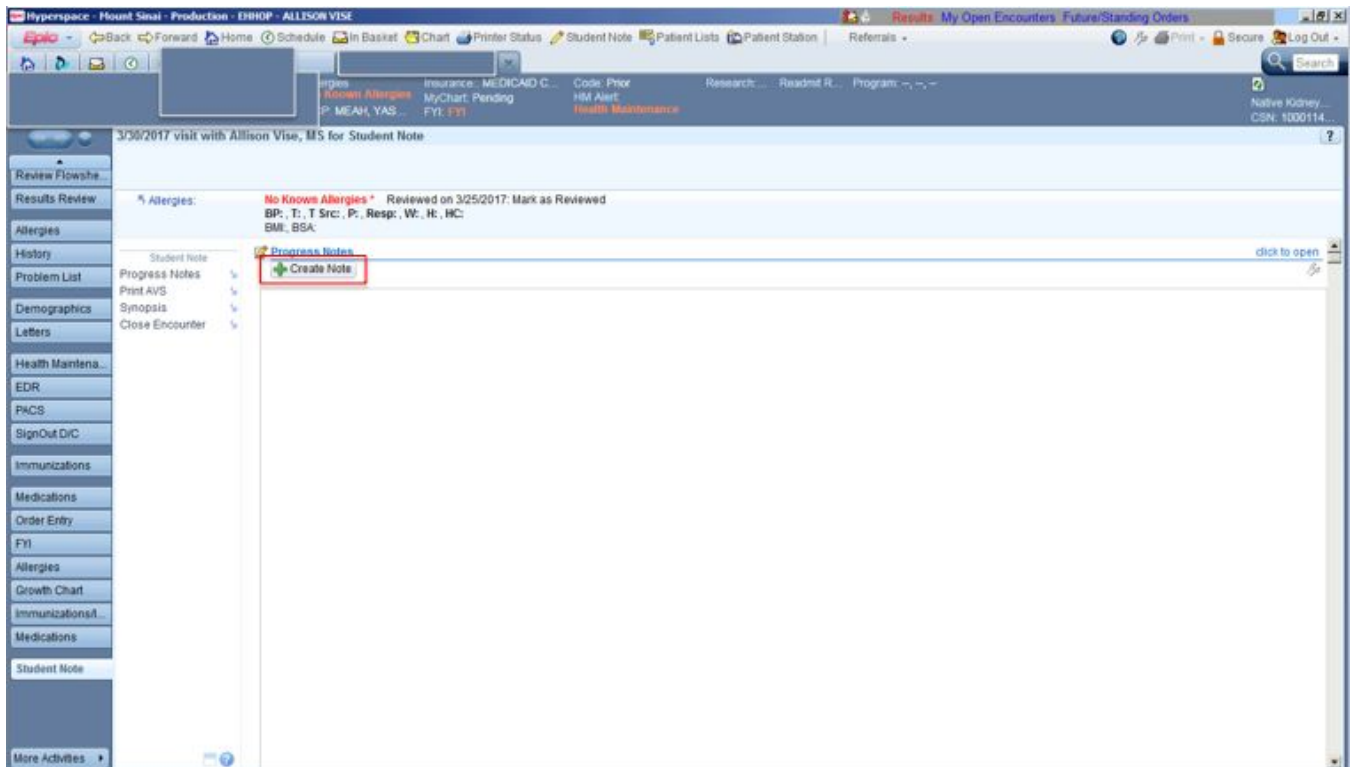
- 2) The Patient Lookup box will appear. Find the patient about whom you want to write a note by selecting their name or entering their Name/MRN:



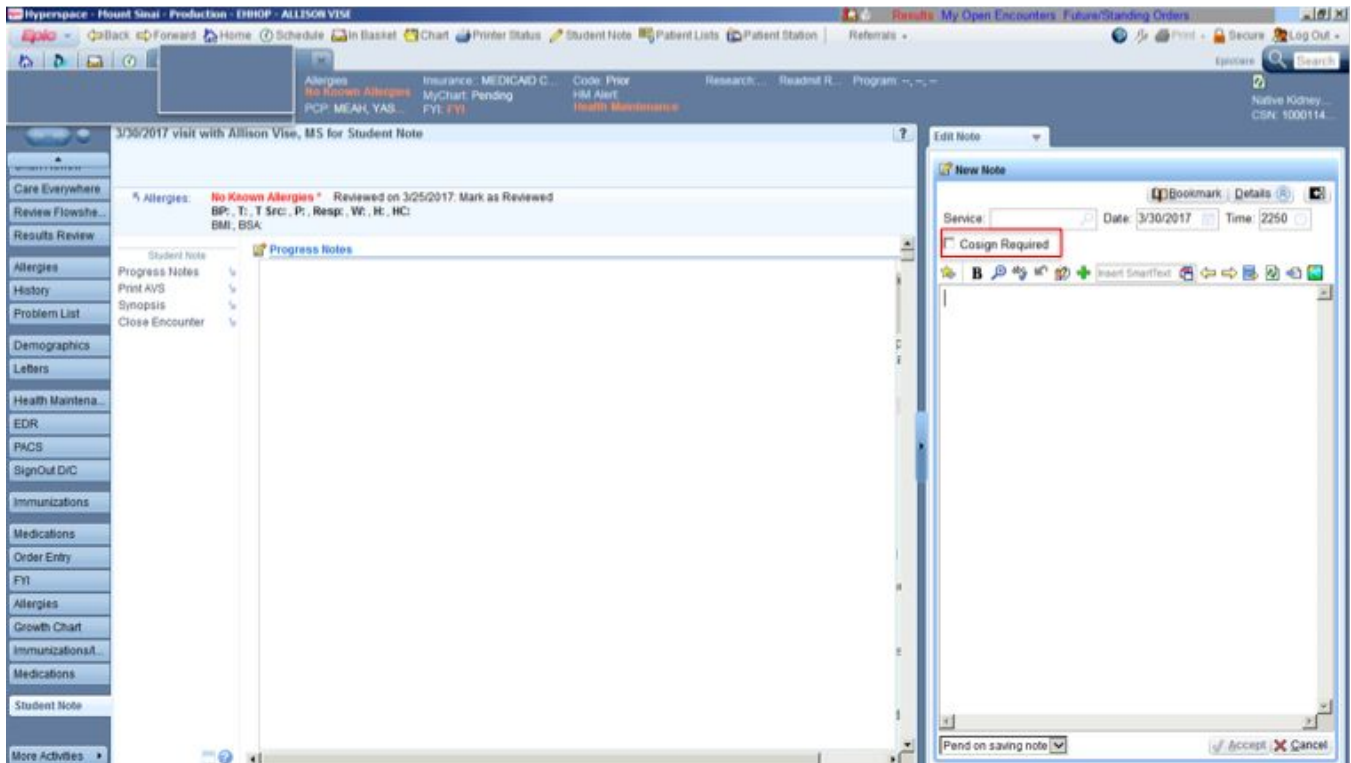
3) Enter your name as the provider. Enter EHHOP as the department:



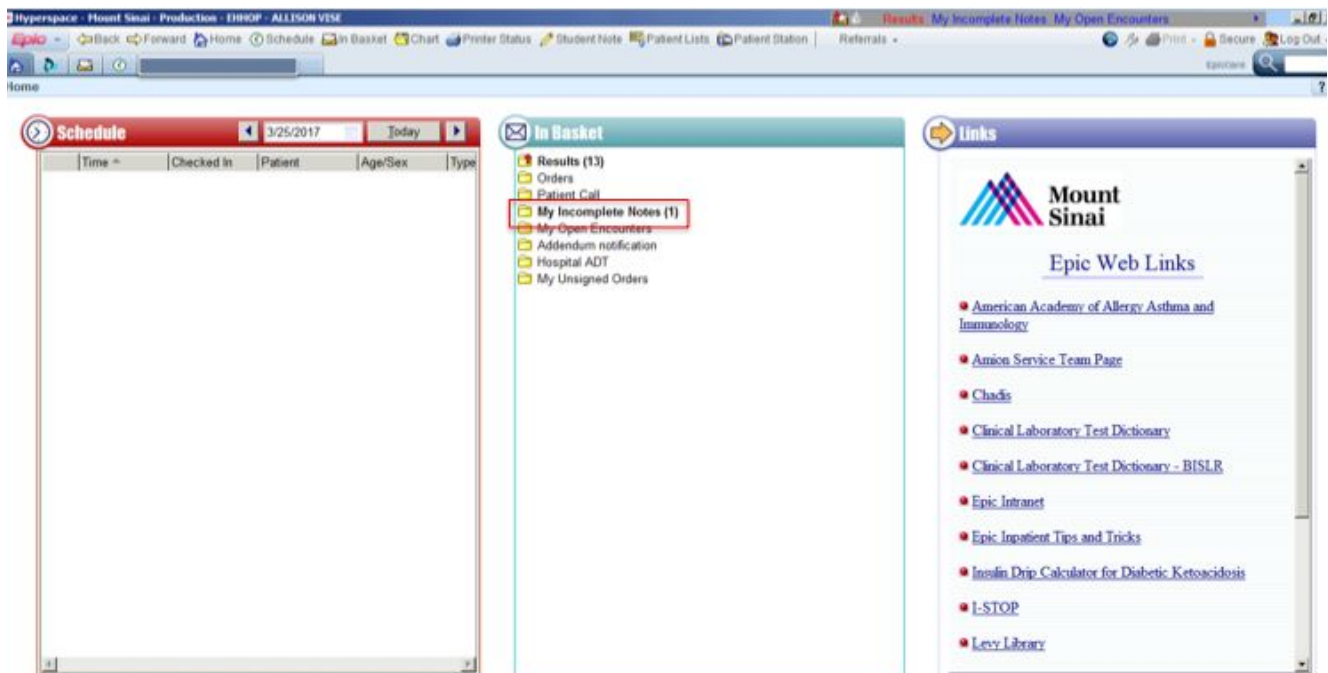
4) Write your note by selecting +Create Note:



- 5) Your note screen will look like this (below, right). You do not need to enter EHHOP as the Service. Check the "Cosign required" box. You can press Accept to "Pend on saving note" (aka save) a work-in progress, or change the drop down to "Sign on saving note" when you are done:



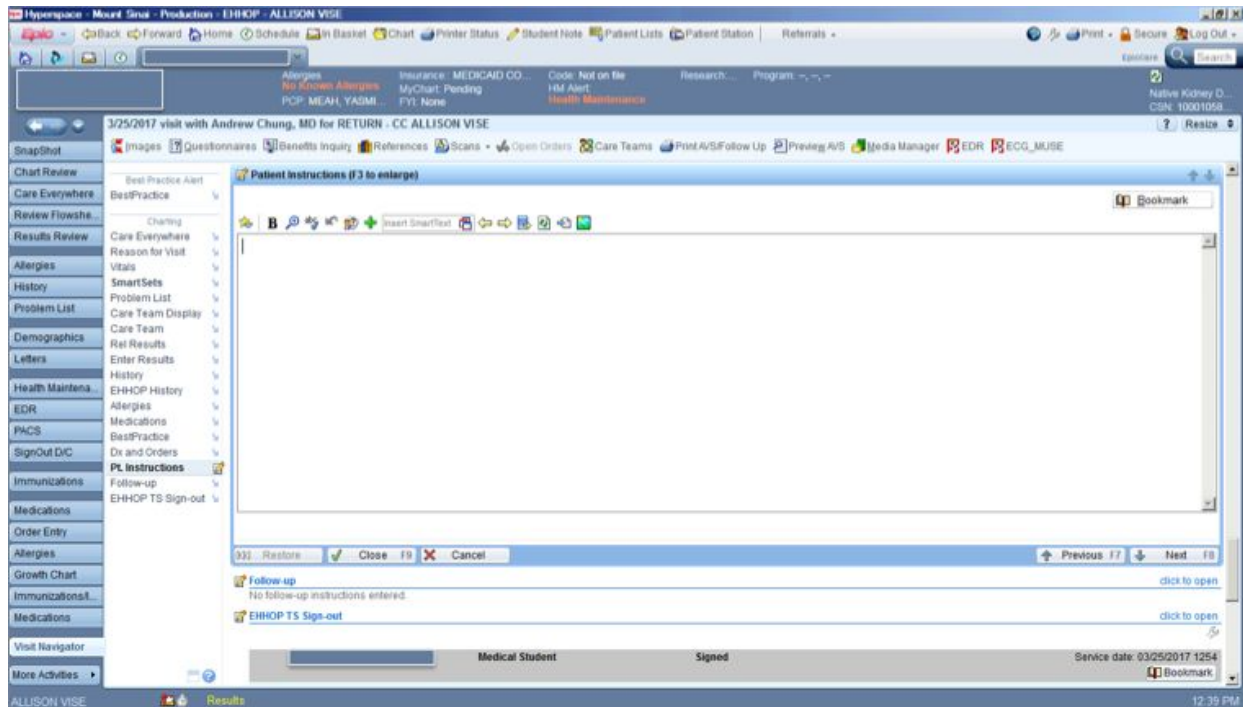
- 6) If you save before finishing and then want to re-access your student note, do so from your Home screen. DO NOT start another Student Note. You can access this way (below), or by going to Patient Station -> look up your patient -> double click into Student Note Encounter:



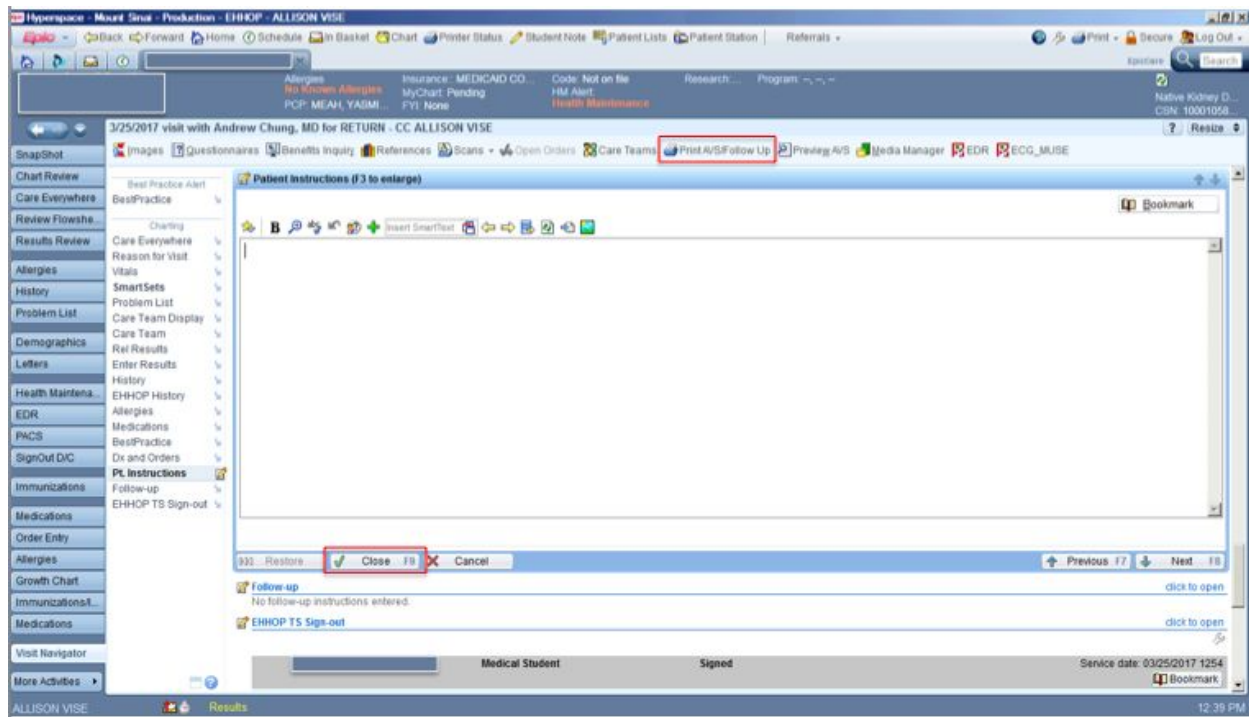
Patient Instructions

You can write and print instructions for your patient. Instructions can include directions about medications, reminders to exercise, motivation to help your patient reach their goals, or anything else you'd like them to take home in-hand!

1) From the Visit Navigator, select Patient Instructions:



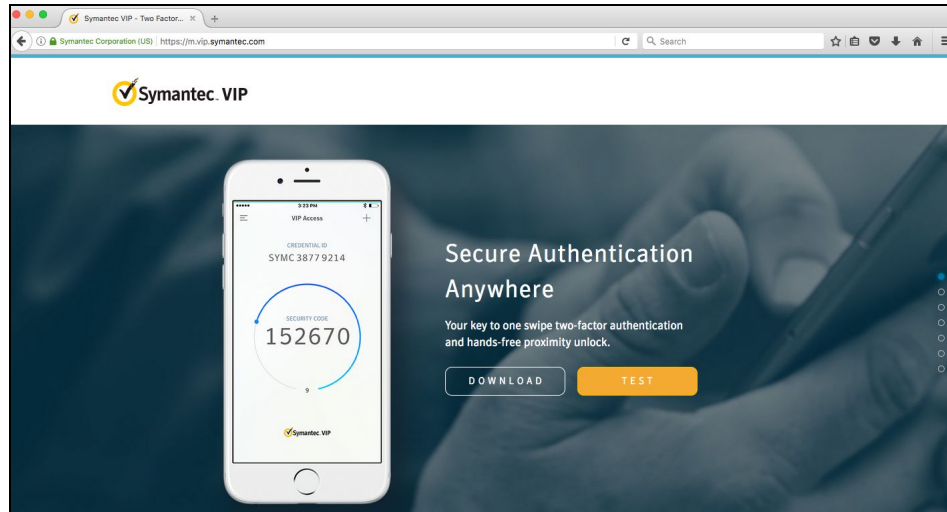
2) Type your instructions. Select Close (bottom left). To print, select Print AVS/Follow Up:



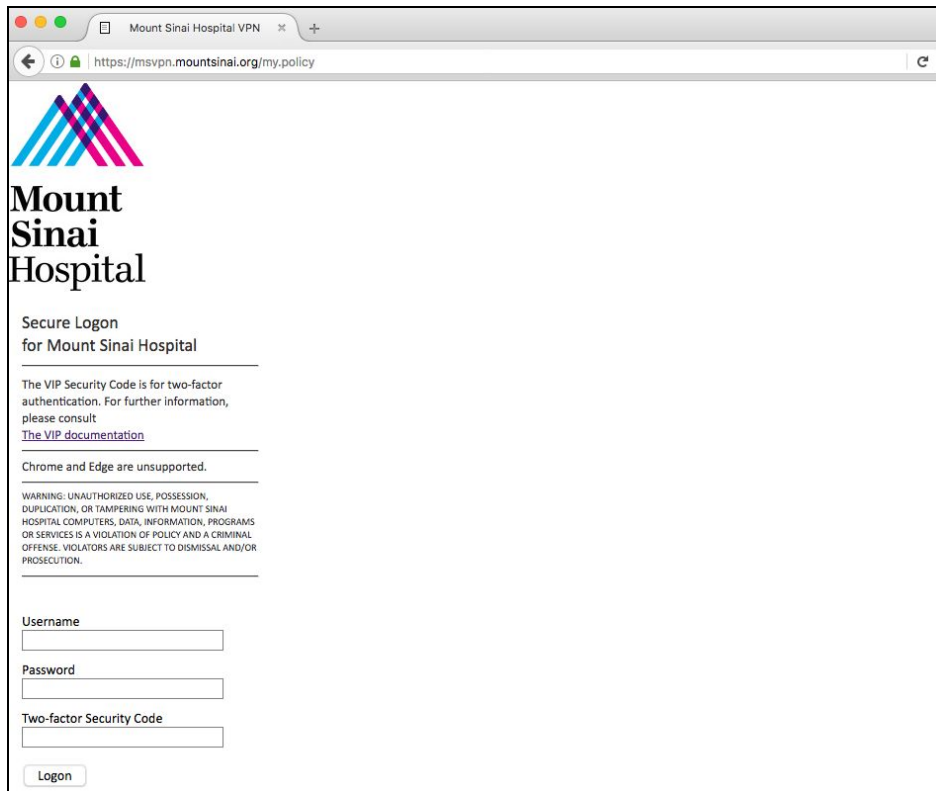
Accessing Epic (from off campus)

You can either go to the IT office in Levy Library to have the Citrix Desktop downloaded and configured, or you can use the Mt. Sinai VPN with a Two-factor security code to access Epic from home. We explain how to use a Two-factor security code here.

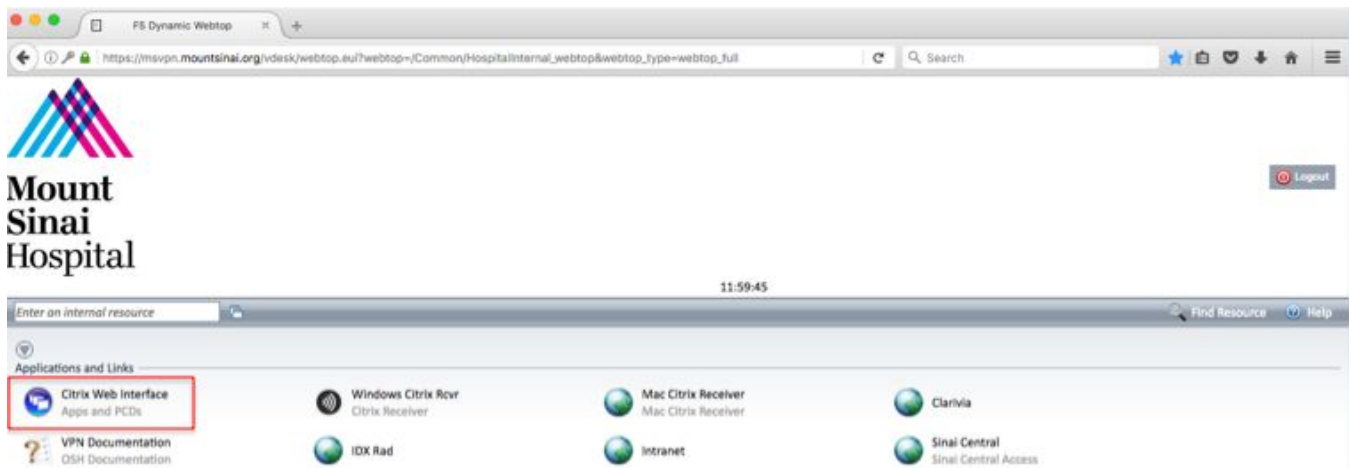
- 1) Download **VIP access** at <https://m.vip.symantec.com/> for your computer or download the app on your smartphone:



- 2) Go to <https://msvpn.mountsinai.org/my.policy> to access the Mt. Sinai VPN. Enter your username, password, and use VIP access to get your Two-factor security code:



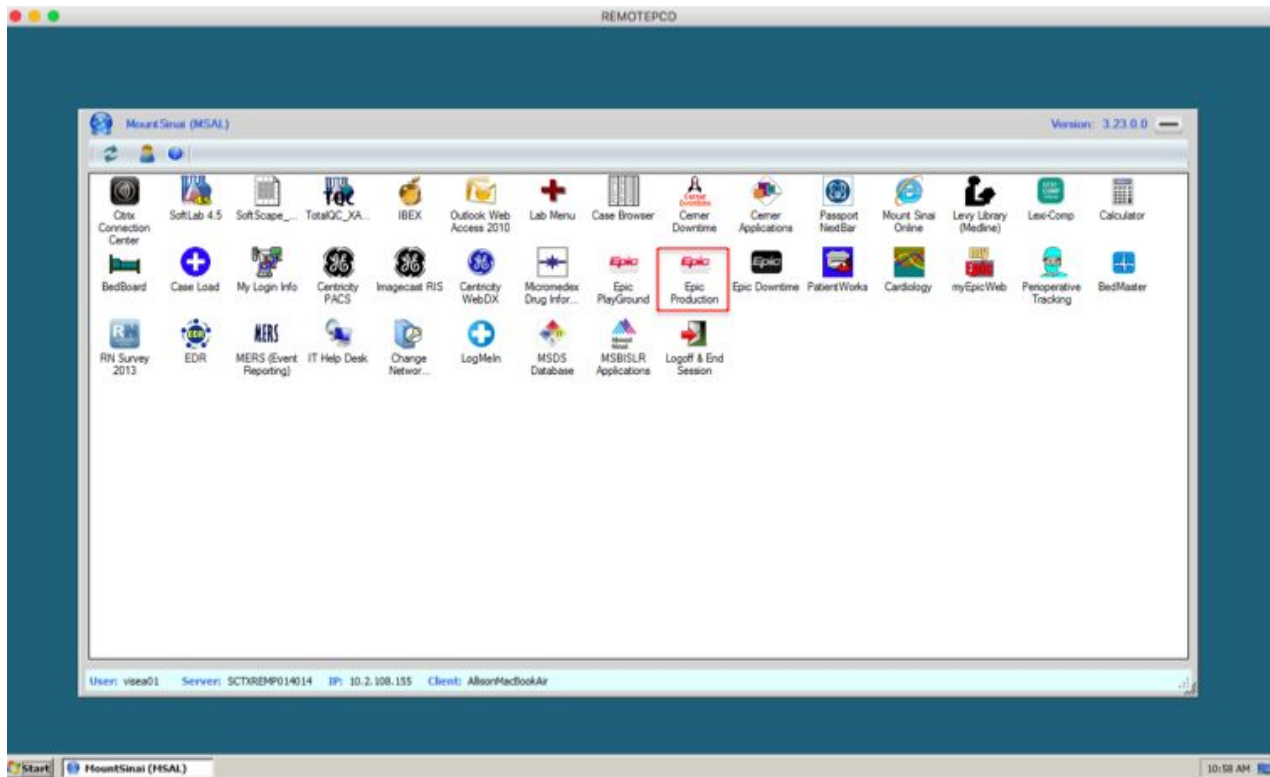
3) Click Citrix Web Interface:



4) Click REMOTEPCD, and the Citrix Viewer will open:



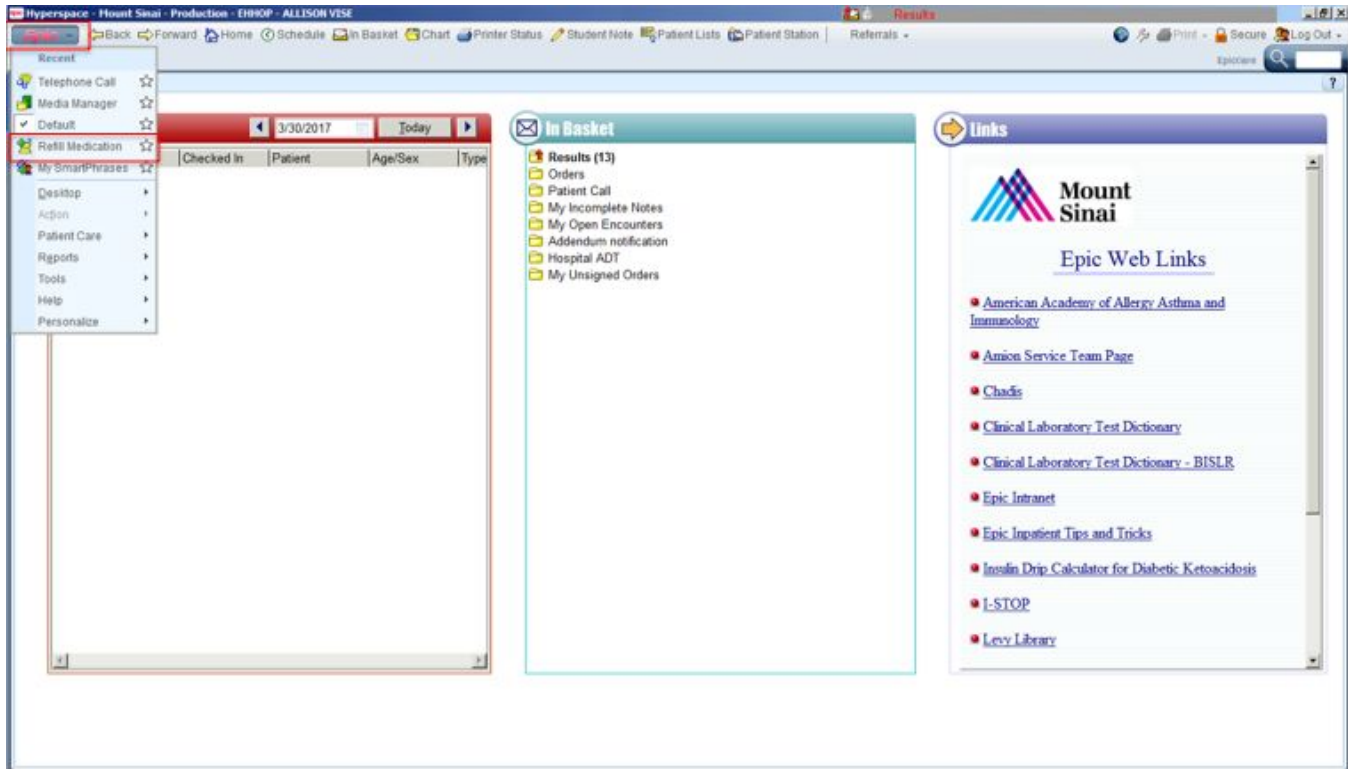
5) Select Epic Production:



Placing orders and prescribing medications (outside of a clinic visit)

Chronic Care Seniors and Teaching Seniors will periodically fill their patients' medications in response to a request made outside of a clinic visit. There are 2 ways to do this. We will review the newer, easier way here.

- 1) Select the Epic button in the top left corner of your screen. Select Patient Care -> Select Refill Medication (or, Refill Medication may be starred, as below):

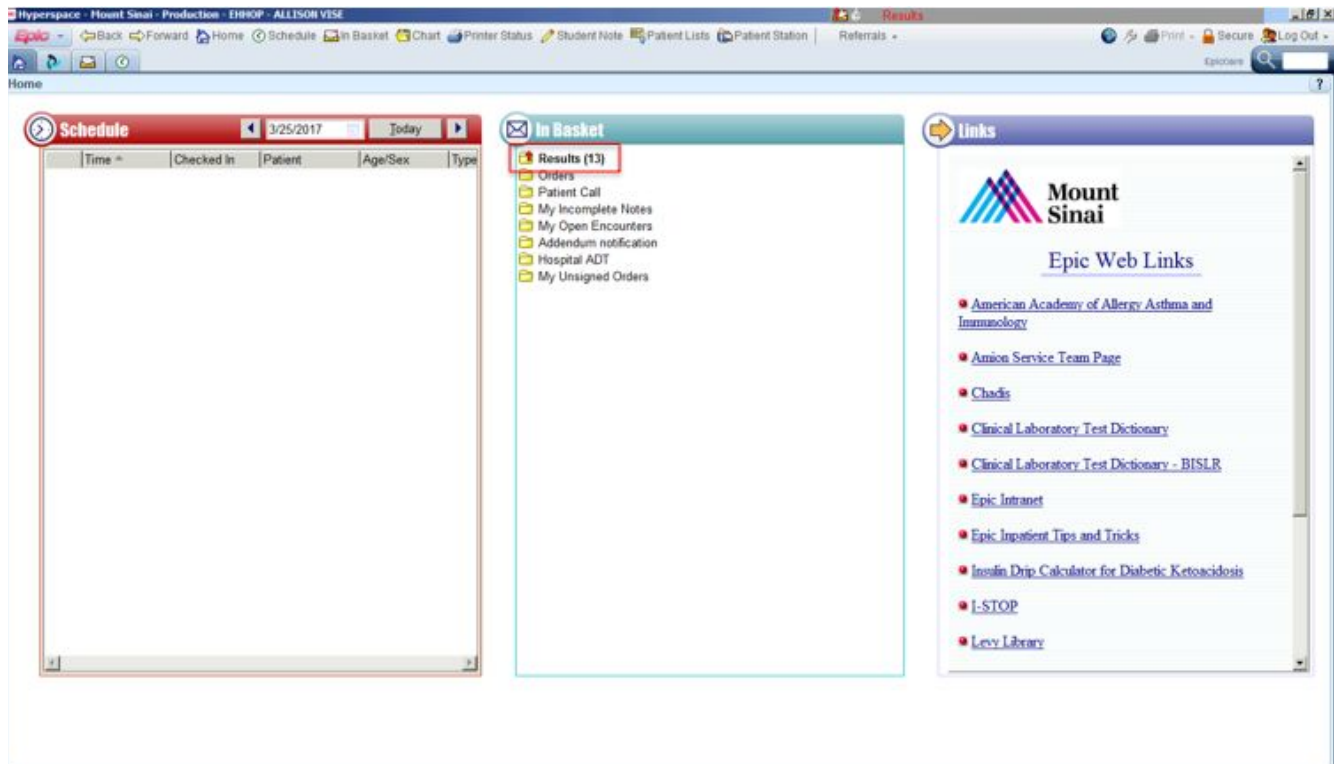


- 2) Enter your patient's name. Enter your name as the provider, and EHHOP as the context.
- 3) Reorder a medication from their list of medications by selecting Reorder, or place a new order, following the instructions above and using the Order Entry text box. Select Close.
- 4) Route the note to Dr. Meah, NP David Skovran, and the Chief Teaching Senior. You will not be able to sign the order. Simply select the "X" to close it. Routing the order to Dr. Meah and David Skovran ensures that it will be signed by one of them. You will get a notification when it is signed.

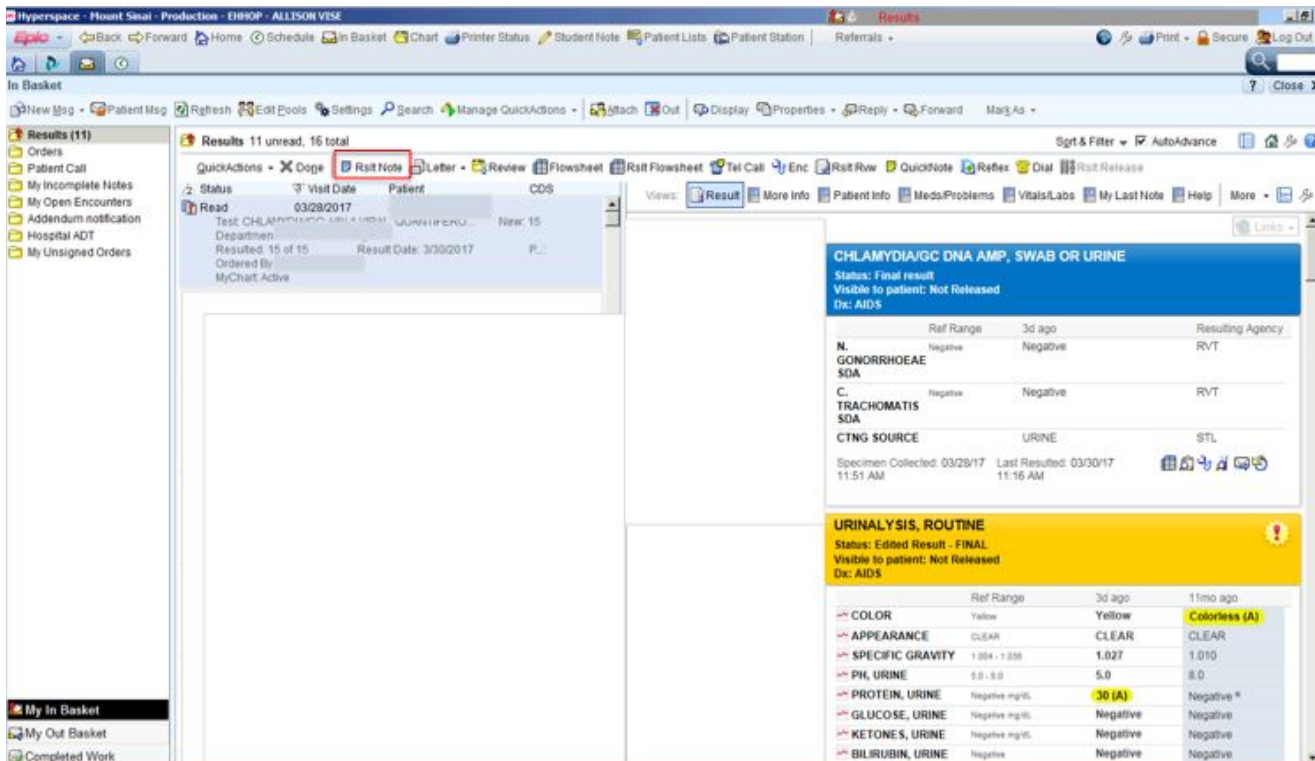
Writing a Result Note

Chronic Care Seniors and Teaching Seniors write Result Notes on all resulted labs from clinic.

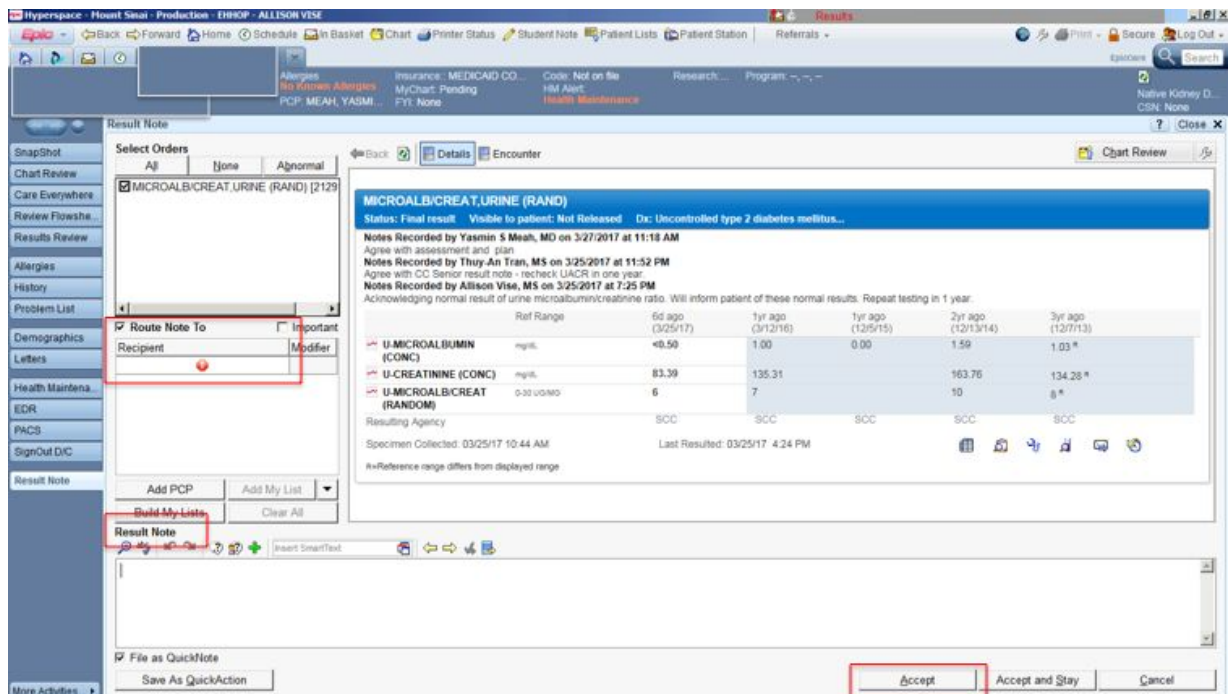
1) Select Results on your home screen:



2) Select Rslt Note from the top menu bar:



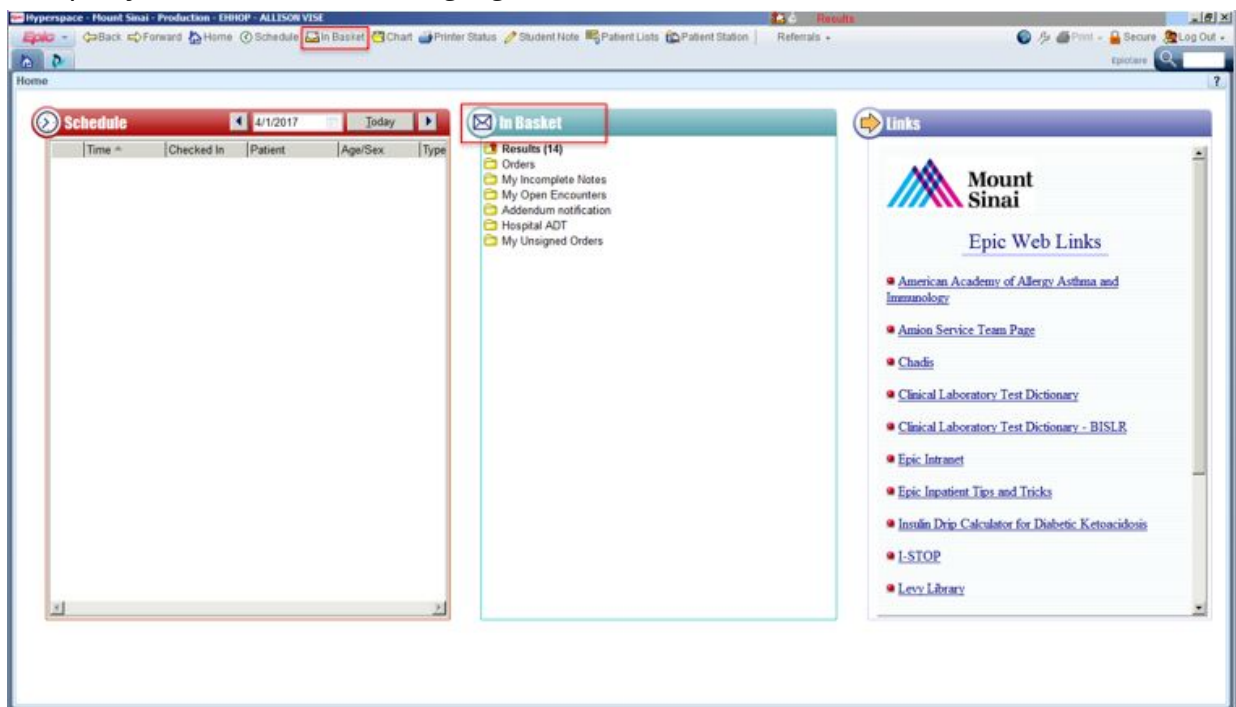
3) Under Recipient, route to Dr. Meah, NP David Skovran, the Chief Teaching Senior, and the Teaching Senior of the week/Chronic Care Senior (when applicable). Write your note in the box at the bottom. Select Accept when you are done:



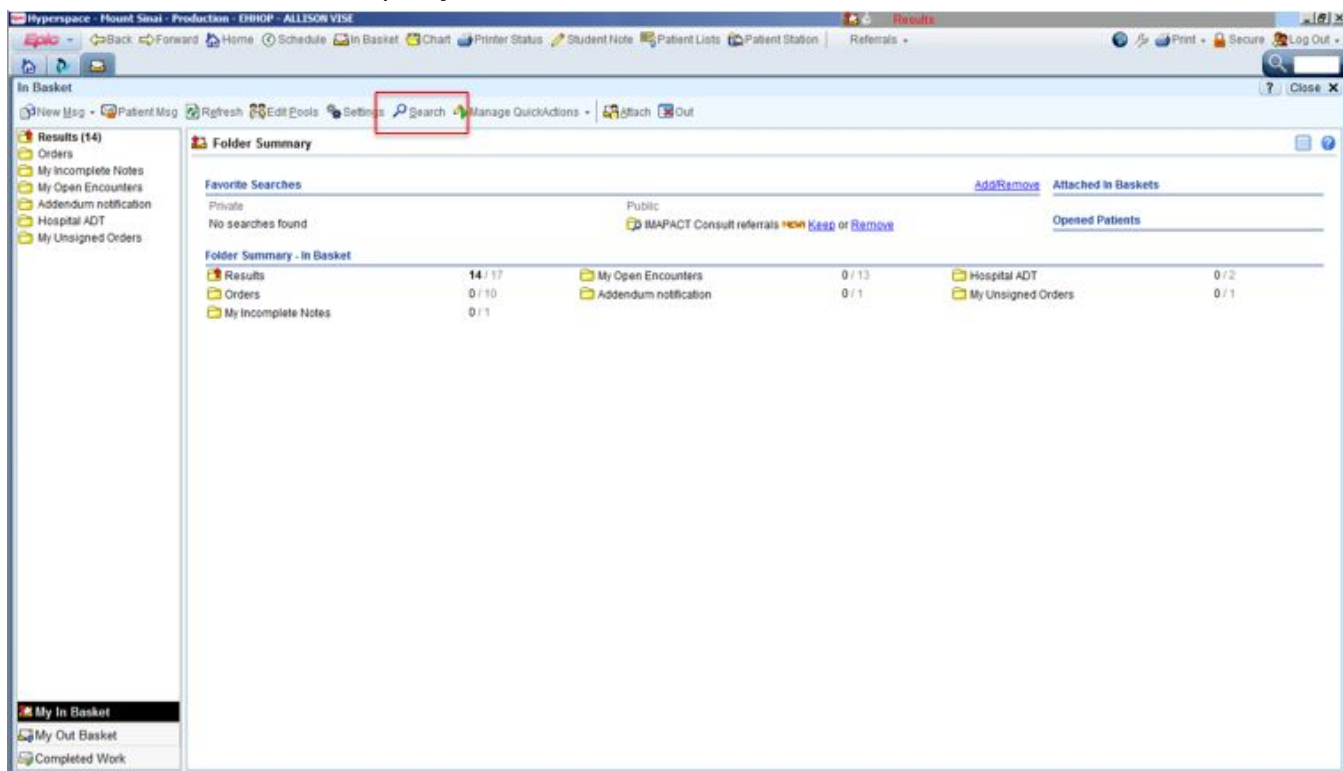
If Results are “missing” from your In Basket, i.e. you are the Teaching Senior of the week but the results you expected from a patient are not in your In Basket, it is likely because another person in

the pool (meaning among all Teaching Seniors) has reviewed that Result and marked it as Done. To find it, follow these steps:

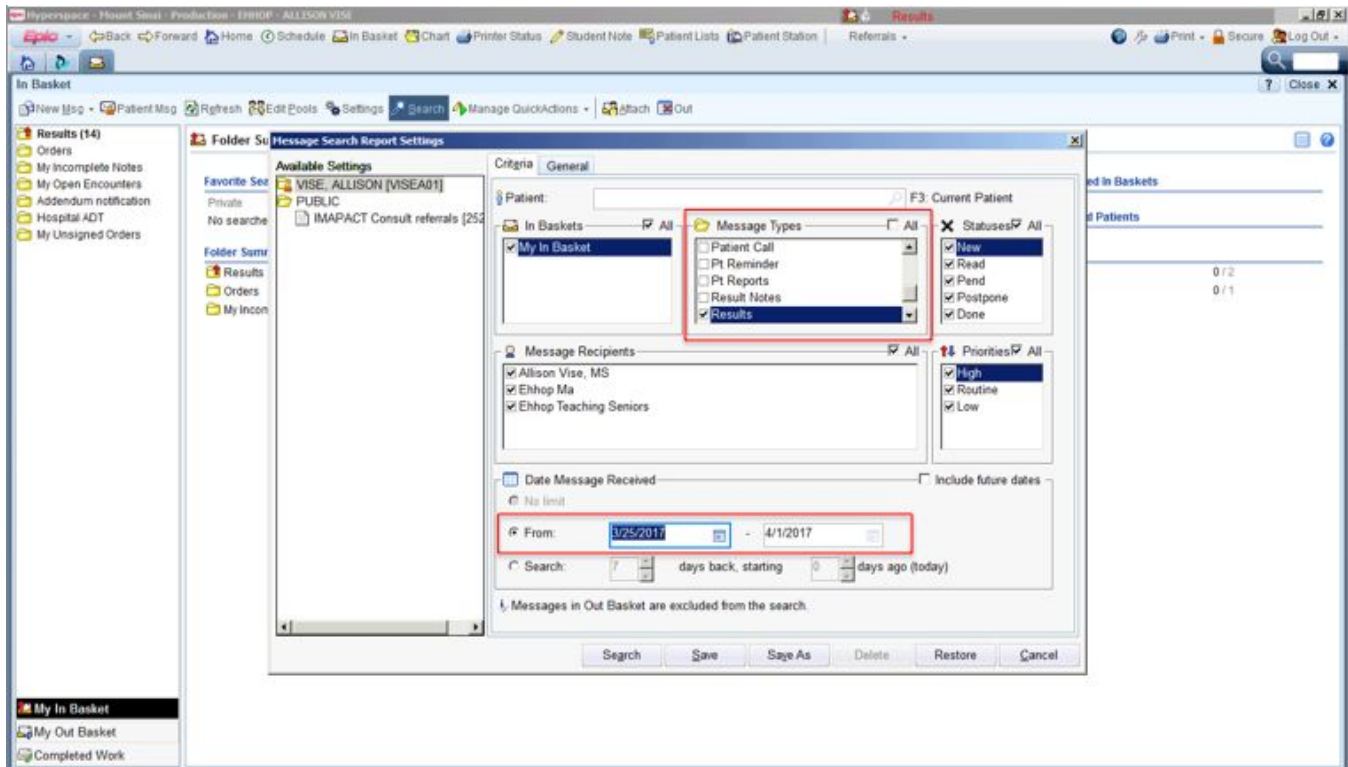
1) Open your In Basket (either highlighted button will work):



2) Click Search, at the top of your window:



- 3) Under Messages Types, uncheck all options except for Results. Leave all other boxes checked under the other headings. Under Date Message Received, change the date range to (the clinic date - current date). Then, click Search:

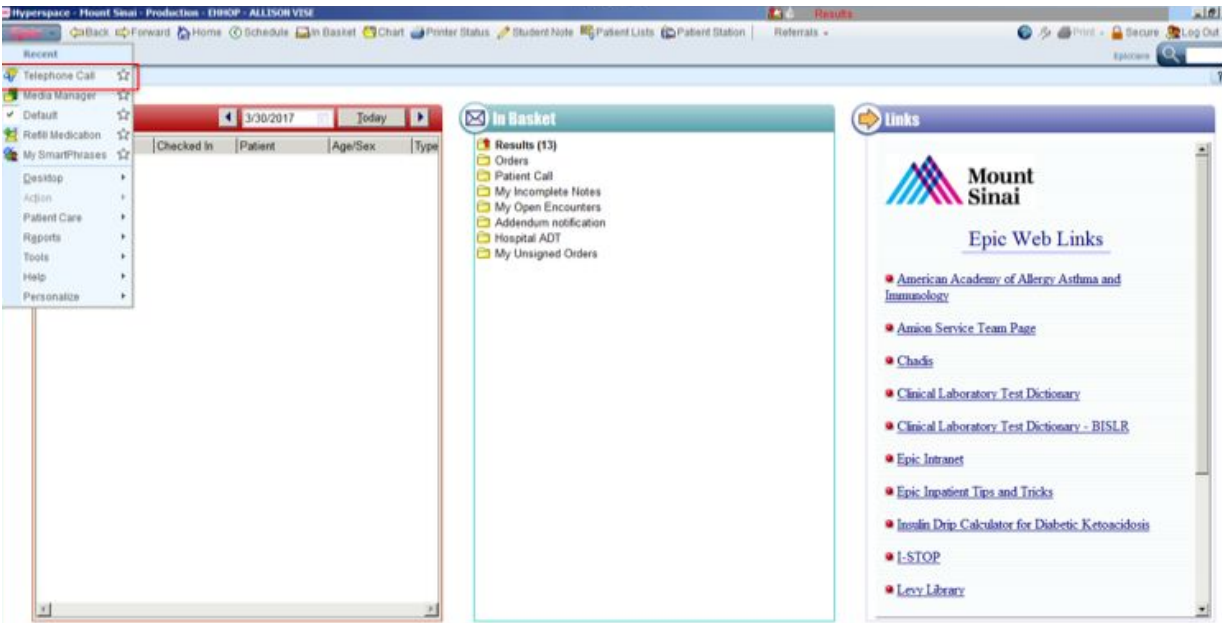


- 4) All Results of labs from clinic day will populate. Write Result Notes (follow instructions above)!

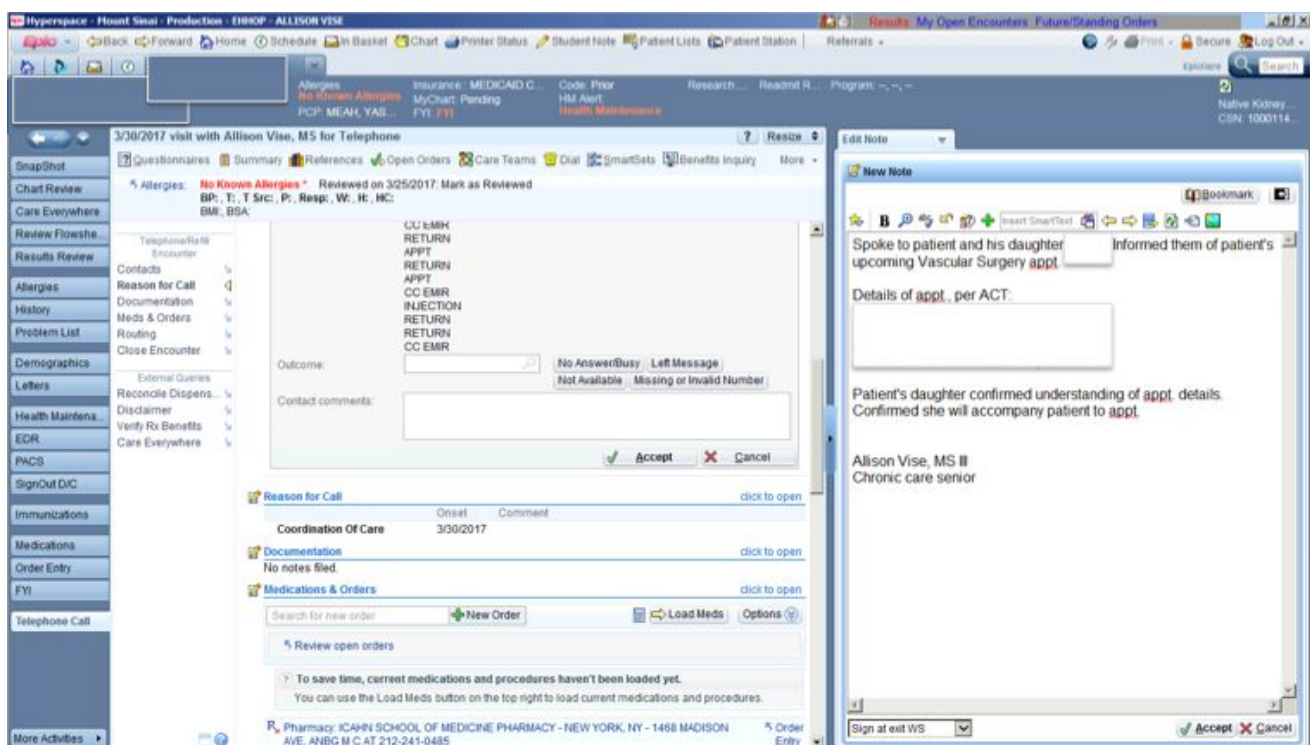
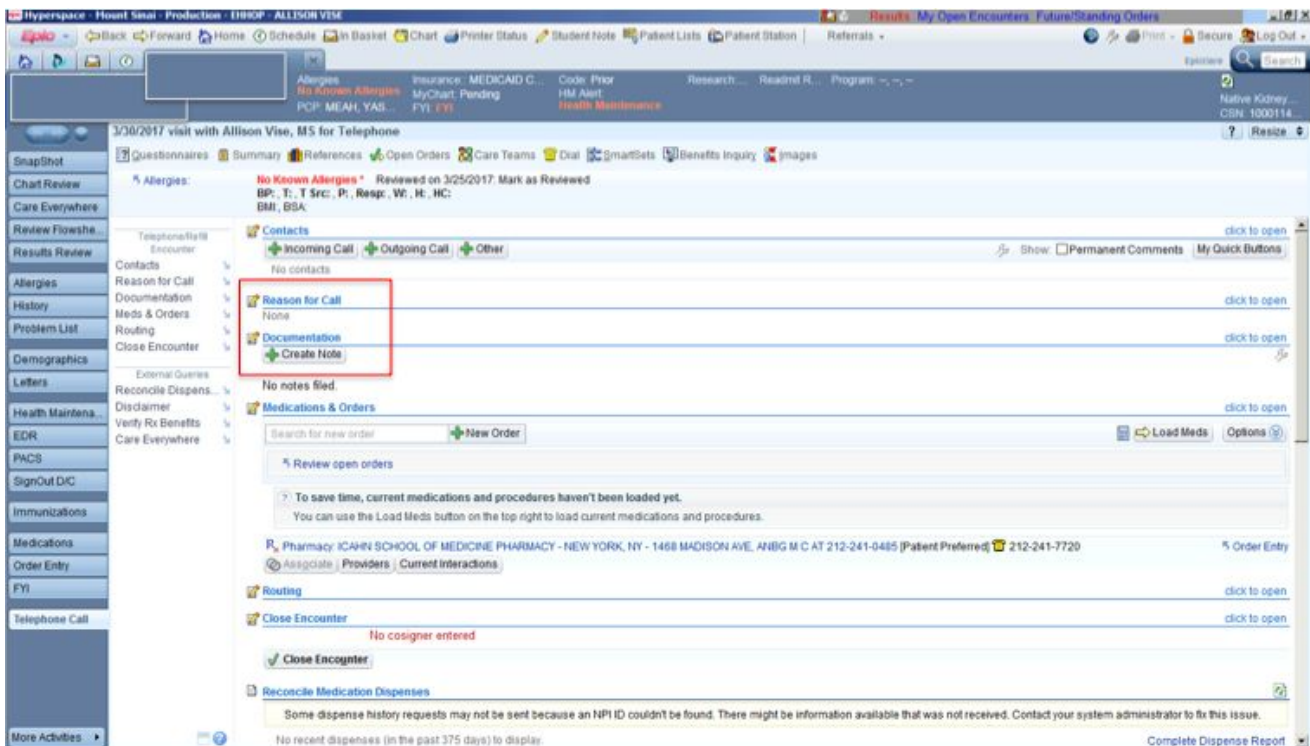
Documenting a Telephone Encounter

Write a telephone encounter to document communication with your patient outside of clinic, or to record other miscellaneous information relevant to your patient's care. That way, all of their care-related communication is well-organized, and in one place. This makes it easy for all care team members to be aware of what's going on with your patient's care.

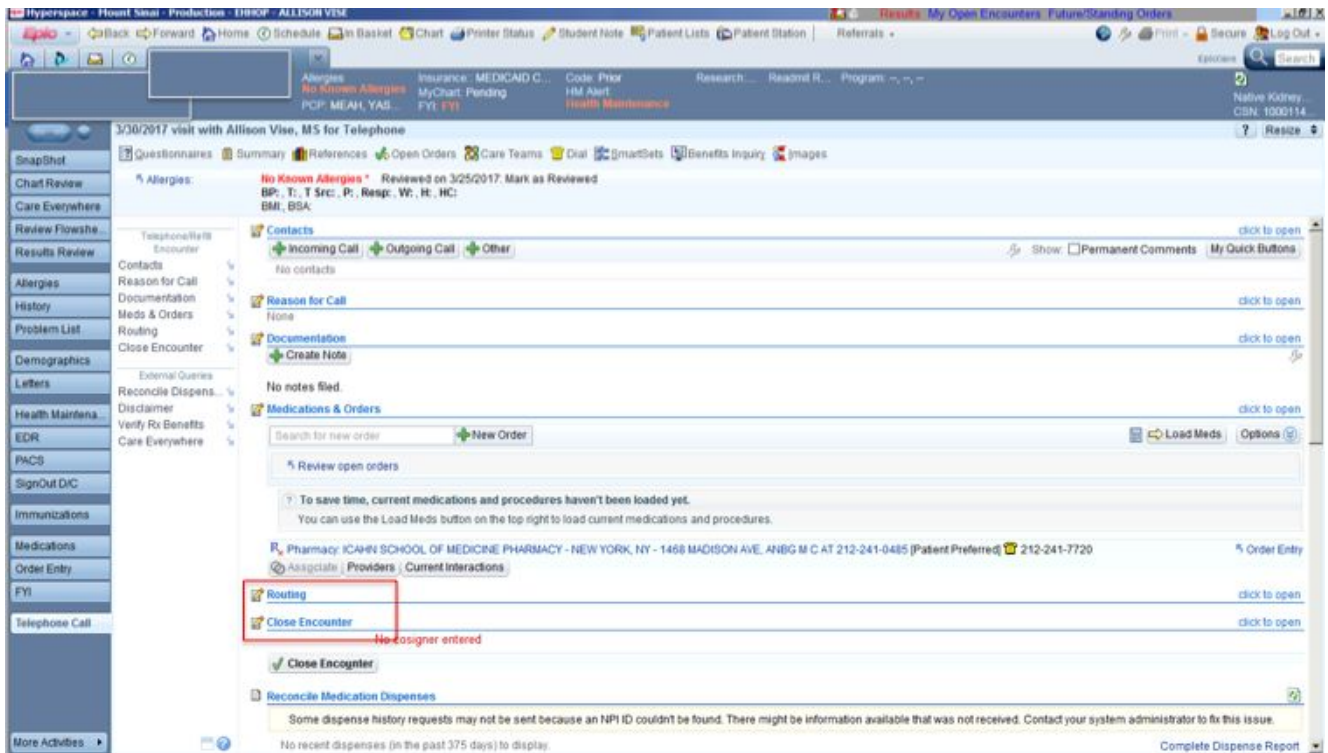
- 1) From the Epic menu on your home screen, select Telephone Call:



- 2) Document your encounter by recording the date/time of the communication, the reason for the call (i.e. Coordination of Care or Lab Results), and write a brief description:



3) Route the encounter to Dr. Meah, NP David Skovran, the Chief Teaching Senior, and anybody else relevant to this aspect of your patient's care:



- 4) Select Close Encounter to add Dr. Meah or David Skovran as the co-signer, and then enter your password to sign and close the visit:

