

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:



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

Your acco	unt information
Wireless access information	Your currently logged on account
This is your school AD account (not email account).	This is your school AD account (not email account).
SSID MSMC-green	Directory name MSSMCAMPUS
Login ID MSSMCAMPUS/visea01	Login ID vises01
	Name Allison Vise
	Mail alison.vise@icahn.mssm.edu
	Status active
Blackboard access information	Password expiration 2017-05-04
This is your school AD account (not email account).	Change password
Directory name MSSMCAMPUS	
Login ID visea01	
and the second sec	Other accounts
	This is your hospital network logon.
	Directory name MSNYUHEALTH
	Login ID visea01
	Name Allison Vise
	Mail Not configured for this account
	Status active
	Password expiration 2017-05-04
	Change password
	This is your Chiphet account.
	Directory name CHPNET
	Login ID visea01
	Name Allson 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:

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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:

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

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

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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:

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matory		03/25/2017		Office Visit	EHHOP	Chung, Andrew, MD	Uncontrolled type 2 diabetes mellitus with diabetic neuropathy, with long	aterm current use of insulin (Prima
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Health Mainteina		01/31/2017		Telephone	EHHOP	Vise, Allison, MS		
	0	01/26/2017		Office Visit	HOSP ORTHOPEDICS	Meier, Kristen M, MD	Knee pain, unspecified chronicity, unspecified laterality (Primary Dx)	
EDR		01/21/2017		Nutrition	EHHOP	Cholewka, Jennifer, RD		
PACS		01/21/2017		Student Note	EHHOP	Rifkin, Robert A, MS		
SignOut D/C	1	01/21/2017		Office Visit	EHHOP	Rivera, Veronica, MD	Uncontrolled type 2 diabetes mellitus with diabetic neuropathy, with long	pterm current use of insulin (Prima
		01/18/2017		Telephone	EHHOP	Vise, Allison, MS		
Immunizations		01/11/2017		Telephone	EHHOP	Vise, Allison, MS	Arthraigia of right knee (Primary Dx)	
No. of Concession, Name		01/11/2017		Student Note	EHHOP	Vise, Alison, MS	Arthraigia of nght knee (Primary Dx)	
Medications		01/10/2017		Telephone	EHHOP	Vise, Alison, MS	Pain in joint, multiple sites (Primary UX)	
Order Entry		12/16/2017		Telephone	MR IAM SLD DOOREU	Vise, Alison, MS	Efficience of each longer inject (Drimany Dr.)	
Allergies		12/11/2016		Student Note	FHHOD	Paois Neisd Esternah MS	Encision or right whee Joint (Printary UK)	
Growth Chart		12/11/2016		Student Note	EHHOP	Paran Neiad Fatemeh MS		
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Medications		12/09/2016		Telephone	EHHOP	Vise, Allison, MS		and a second sec
Constant and the second second		12/04/2016		Student Note	EHHOP	Mo. Shelley, MS		
VISIT HERIGARD		12/04/2016		EHHOP OPH	EHHOP	Chadha, Nisha, MD	Established Patient / Chronic Problem - annual diabetic eye exam	
More Activities +		12/01/2016	15	Telephone	EHHOP	Vise, Allison, MS		-
ALLISON VISE	11	104	Retuits					12-34 DM

Beginning your visit

As described above under "Chart reviewing":

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

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27 28 29 30 31 1	9:00 AM	Scheduled	Ebhoo1	EHHOP			RETURN	
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17 18 19 20 21 22	9:00 AM	Scheduled	Lab	EHHOP			LABS ONLY	
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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:

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	* 9:00 AM			Scheduled	Ehhop7	EHHOP			RETURN	
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	10:00 AM			Scheduled	Social Worker	EHHOP			SOCIAL WO	
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	11:00 AM			Scheduled	Gyn2	EHHOP			GYN FOLL	
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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:

Hyperspace - M	ount Sinai - Production -	EHHOP - ALLISON VISE						X
Epic - Cat	Back SForward AHo	me 🕜 Schedule 🖾 in Ba	asket 🚰 Chart. 🍙 Printer Status	🖉 Student Note 🖷 Patient	Lists Patient Station F	Referrals +	6 / 3	Print - 🔒 Secure 🧟 Log Out -
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PACS	Medications V		Outreach	Outreach	Outreach	Outreach	Outreach	
SignOut D/C	BestPractice 5		07/09/16	07/31/16	09/10/16	10/15/16	10/15/16	03/25/17
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recordents	EHHOP Is sign-out	BP	125/70	140/72	108/62	109/57		122/78
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The second second		Temp sin						
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ALLISON VISE	Red Re	sulta	110-1100-111					12:22 FM

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:

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Reviewing prior visits' vital signs:

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

Hyperspace - Mount Sinai - Productio	on - EHIROP - ALLISON VISE	X
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Visit Navigator		
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ALLISON VISE	Results	12:37 PM

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

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(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
Allergies	Pulse			76	75	79	76	76	80	78	80	72	10000	70	65	70	72
History	Site	Left Arm				Left Arm	Foght Arm	Foght Arm	Right Arm	Right Arm	Left Arm	Left Arm	Lett Arm		Foght Arm	Foight Arm	Right Arm
Problem List	Temp	-				Sitting			Sitting	Sitting	Sitting	Sitting	Sitting	97	Sitting	Sitting 07	sitting
	Resp	1			10	10	16	18	14	18	18			18	18	18	20
Demographics	SeO2	1			98	99	14	1.4			10			98	10	1.0	
Letters	Height	1				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 az	161 lbs		166 lbs 14 oz		165 lbs	165 lbs	156 lbs 8 oz
Heath Maintena	Comments																
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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:



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):

		ehhapp.org	Ċ	₫ ₽ +
Login		Formulary		🖉 Edit
Medications right now. It's urgent! How does my patient fill Rx? NOTE: All pharmacy directions must be entered in ENG NOTE: If you need to prescribe a medication that is not order. Tell the TS if your patient needs medical devices (e.g. Ask TSes about corticosteroid potency chart! <u>PPI Prescribing Decision Aid</u> Any other questions/difficulties? Contact Pharm Chair, K	LISH on Epic isted on the EHHOP Forn I. wrist braces, compres atie (katherine.arden@ica	nulary, write "Please contact Dr. Yas sion stockings). These can be ord hn.mssm.edu).	min Meah before filling this medication" in ered for your patient, but not through the S	the free text field of the prescription Sinai Employee Pharmacy.
(ibuprofen				0
ANALGESICS				
lbuprofen \$0.04 (400mg)				
i FAQ (Contact	et Ops	لگ) Rx	Docs

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

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2. Arthritis of right knee	M19.5	Pharma	inadeq icy ICAHN SCHOOL OF	uate material resources F MEDICINE PHARMACY - NEW YORK, NY - 1467	259.8 MADISON AVE No unsid	12/19/08

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

Hyperspace - Mo	ount Sinai - Production	EHHOP - ALLISON VISE		X
	Back 🖘 Forward 🏠 Ho	ne 🕜 Schedule 🚨in Basket 🚰 Chart 🧉 Printer Status 🤌 Student Note 🖷 Pr	dent Lists 🏠 Pallert Station Referrats + 🛛 🎯 🤌 🚳 Print +	Secure 🧟 Log Out +
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Allergies		Prescribed Amount. 1 tablet		
History	Route	oral 🔎 🚥		
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Descention	1	PRN reasons: Fever	☑ Pain	
Letters		PRN comment:		
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EDR	Mark long-term:	BUPROFEN		
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Medicalized	Oispense:	30 tablet Refit:		
Order Entry		Dispense As Written		
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Medications	-	This medication will not be e-prescribed. Invalid items: Provider Details		
	Priority:			-
Visit Navigator	Previously Signed C	ders (1)		
	+ Diagnoses Associa	Associate All	Leyel of service:	Edit
Moré Activities	Auth Prov. No authon	ing provider selected	Pharmacy: ICAHN SCHOOL OF MEDICINE PHARMACY - NEW YORK, NY - 1468 MADISON AVE,	1 order entered
ALLISON VISE	Red R	suffs		12:25 PM

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:

Hyperspace - Mount Smat - Pre	dadaw • EHROP • ALLOGAN VIDE	1013
Epilo - CBack CFerwar	nd 🚡 Home 🕜 Schedule 🚠 ni Basket 🥱 Chart 🥔 Printer Status 🥜 Student Note 🖐 Patient Lists 😰 Patient Station Referrals -	🚱 // Print - 🔒 Secure 🦉 Log Out -
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LISON VISE	de Results	

The pended medications will look like this:

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Care Everywhere	New order. Search @ Both O Me	dication O Procedure				Net Edit	Multiple
Review Flowshe	New order defaults. Not using defaults						
Results Review	Medications (1 Order)						
Allergies	Ibuprofee (ADVIL,MOTRIN) 400 mg tablet				8	Ren	nove
History	Take 1 tablet by mouth every 6 hours as needed for Fever	r Pain, Disp-30 tablet, R-2, E	-Prescribing				
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More Activities	Auth Prov. No authorizing provider selected	Phar	macy. ICAH	IN SCHOOL OF MEDICINE PHARMACY	- NEW YORK, NY - 1468 MADISON AVE.	1 order entere	d
ALLISON VISE	Results						2-27 PM

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

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History	Take 1 tablet by mouth every 6 hours as needed for Fever o	r Pain , Disp-30 tablet, R-2, E-	Prescribing			
Problem List	This medication will not be e-prescribed. Invalid items: Provider Details					
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Growth Chart	* Diagnoses Associate Associate All				Level of service:	Edit
Immunications1	Add Diagnosis	2 3 Edt Remove		New Proglem	Show Resolved	Edit Repolve
Medications	P Diagnosis	ICD-10-CM ICD-9-CM		Link Problem	Code	Noted
Visit Navigator	 Uncontrolled type 2 diabetes intellius with diabetic neuropathy, with long- term current use of insulin 	E11.40 250.62	\$	Diabetic neuropathy	E11.40	4/17/14
Constitution and Const	2. Arthritis of right knee	M19.90 716.96	\$	inadequate material resources	252.51	12/19/08 -1
More Activities	Auth Prov. No authonizing provider selected	Phar	macy ICAL	IN SCHOOL OF MEDICINE PHARMAC	Y-NEW YORK, NY-1468 MADISON AVE 1 orde	er entered
ALL INCOME AND T	Development of the second seco	1, 101	inday for a			10.07.014
HULISUM VISE						14.47 PTN

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:

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		Allergies Insurance: MEDICAID CO Co No Known Adergies MyChart: Pending Hill PCP: MEAH, YASMI FYI, None III	kie Not on Nie Research. Pho 4 Alert: ntffh Märnlemande			Native Kidne CSN: 10001
CHEVREN .	3/25/2017 visit with A	ndrew Chung, MD for RETURN - CC ALLISON VISE nnaires இBenefits Inquity mReferences இScans - 46 Open Ord	rrs 🐹 Care Teams 🎯 Print AVS Follow Up	Preseg A/S 🛃 geda h	lanager 🛱 EDR 🕅 ECO_MUS	2 Res
Everywhere	Best Practice Alert	2 Allergies/Contraindications				÷-
ew Flowshe	BestPractice V			W. Vie	w Drug-Allergy Interactions	Show Deleted Expired
Its Review	Charting Care Everywhere	No Known Allergies Last Updated by Ian N Romish, ND o	n 11/13/2010 12:29 PM (History)			
es	Reason for Visit	(*) No Known Allergies				
ry	SmartSets	You can use the box to the upper left to add an allergy or a contr	aindication for this patient.			
em List	Problem List	Mark as Beviewed Unable to Assess T Last Reviewed by R	obert A Rifkin, MS on 1/22/2017 at 2:21 PM	(History)		
graphics	Care Team Display V Care Team	Close FD			1	Previous 17 4 Next
5	Rel Results 5	Medications				click to op
Maintena	Enter Results 5		Taking?	Start Date	End Date	Provider
	EHHOP History	Blood Glucose Meter misc EHHOP Supply		11/02/13	-	Yasmin S Meah, Mi
	Allergies 🗭	lbuprofen 600 mg tablet		01/11/17	-	David M Skovran,
IDIC	BestPractice 5	Take 1 tablet by mouth every 8 hours as needed for F-	ever or Pain.			ANP
	Dx and Orders 5	buprofen 800 mg tablet		11/28/16	-	Amanda A Reamy.
izations	Pt Instructions V	Take 1 tablet by mouth every 6 hours as needed for P	ain (as needed for pain, take with food).			PA
tions	EHHOP TS Sign-out	h Insulin Syringe-Needle, Dis Un 0.5 mL 29 x 1/2" sy	ringe	12/05/15		Gregory Solomon, M
Entry		Lancets Misc	any Minute 2 Syringes.	09/07/13	-	Veronica Rivera, MD
0.5		EHHOP PT				
Chart		Lancets misc		03/21/15	-	Yasmin S Meah, MD
izations.t.		as directed EHHOP diabetes supplies				
fions		Oral Medication Containers (PILL BOX) Misc Misc Weekly sill box		12/15/12		Stephen H Berns, M
avigator		acetaminophen (TYLENOL) 325 mg tablet	1.1210	01/11/17		David M Skovran, ANP
Construction of the local division of the lo		Take 2 tablets by mouth every 6 hours as needed for i	Pain.			

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:

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Review Flowshe	Prescriptic	on Summary for This Visit (3/25/2017)	(14 listed)								1
Results Review	PDVD	Medication	Sig	Disp	Refills	Start Date	Ord/Sold Date	End Date	DAW	Comment	D/C Re
Allergies		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		
History		metFORMIN (GLUCOPHAGE) 500	Take 2 tablets by mouth 2	120 tablet	3 ordered	3/14/2017			No		
Problem List		simvastatin (ZOCOR) 40 mg tablet	Take 1 tablet by mouth at bedtime.	30 tablet	2 ordered	3/14/2017			No		
Demographics Letters		aspirin 81 mg chewable tablet	Take 1 tablet by mouth once daily.	36 tablet	5 ordered	1/21/2017			No		
Health Maintena		gabapentin (NEURONTIN) 300 mg capsule	Take 2 capsules by mouth at bedtime.	60 capsule	2 ordered	1/21/2017			No		
EDR PACS		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					
Sign/Out D/C		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		
Immunizations Medications		Ibuprofen 800 mg tablet	Take 1 tablet by mouth every 6 hours as needed for Pain (as needed for pain, take with	15 tablet	0 ordered	11/28/2016					
Order Entry		alucose blood VI test strins	FHHOP Diabatas Supply	100 each	1 ordered	10/15/2016			No		_
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Medications	D and R	naert SmartText									3
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More Activities +	4 No filters	acoled									¥.
ALLISON VISE	4	Resulta									12-27 PM

- 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:

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212-242-6509		Healthcare maintenance			Ch/Hole
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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:

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Medications	Dx and Orders	Patient Name	MRN ID Type DO	B Sex Street	Address	PCP	SSN	-
Order Entry	Pt Instructions Follow-up							Yasmin S Meah, MD
FYI	EHHOP TS Sign-or	•						Stephen H Berns
Allergies	-							MD
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Medications		aspirin 81	ng chewable tablet		03/04	/17 -		Stephen H Berns,
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		🏠 atorvastati	n (LIPITOR) 40 mg tablet		03/04	/17 ~		Stephen H Berns, MD
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3) Enter your name as the provider. Enter EHHOP as the department:

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Allergies		Take 2 tablets	w mouth every 4 hours	s as needed for Dain				MD	
Growth Chart		artificial tears	dextran 70-hyprome	ellose, (NATURE'S TEAR	S)	09/24/16	-	Noelle M	arie C
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4) Write your note by selecting +Create Note:

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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:

thedule 🔹 3/25/2017 🔹 Today 🕨 🖾 In Basket	links
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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:

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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:

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for Mount Sinai Hospital	
The VIP Security Code is for two-factor authentication. For further information, please consult The VIP dorumentation	
Chrome and Edge are unsupported.	
WARNING: UNAUTHORIZED USE, POSSESSION, DURILGATION, OR TAMPERING WITH MOLUNT SINAI HORSTRILL COMPUTES, ISAA, INFORMATION, PROGRAMS OR SERVICES IS A VIOLATION OF POLICY AND A CRIMINAL OFFENSE, VIOLATION ARE SUBJECT TO DISMISSAL AND/OR PROSECUTION.	
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3) Click Citrix Web Interface:

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



5) Select Epic Production:

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RN Survey 2013	EDR	KERS MERS (Event Reporting)	IT Help Desk	Ohange Networ	LogMein	MSDS Database	MSBISLR Applications	Logoff & End Session						

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:

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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):

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

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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 rate to (the clinic date - current date). Then, click Search:

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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:

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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:

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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:

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