Hospital Provider Guided Practices

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# Chart Basics

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| Scenario   * Patient: **Peyton** – admitted yesterday for pneumonia   + Because this is the training environment, you will need to create your All My Patients list first.     1. Click the **System Lists** in the Available Lists section.      * + 1. Choose the All My Patients list with the puppy foot next to it and right-click and Send to ASP Providers list.     2. Now you can search for your patient/s as described below. Be sure to **Assign Me** to every patient so they show up on your All My Patients List.   + Because this is the training environment, you will have to search for your patients in the patient search bar by choosing **Aspirus Patients in any beds – WH, LH, M...** Make sure you choose the patient with the exact name listed on your Classroom Information Sheet/Tent.      * Focus: Chart Review, Writing Notes, Editing Notes, Deleting Notes |

## Review the chart

* **Open Peyton’s Chart** by double-clicking.
* For this patient, **Dismiss the BPAs** at this time. In the real world, you will address any BPAs that appear.

\*If you get a Welcome screen, click the X in the upper right to close it.

* The **Summary** activity tab provides details about your patient’s current hospitalization. Epic utilizes reports to present patient information to you.
  + Your two default reports are Overview and Index Provider.
* The Overview report is detailed information about your patient. You can also review Notes from Clinical Staff.
  + Take a moment and **scroll through this report**.
    - **Explore the Vitals and I&O reports**.
      * Switch the view to see what the graphs and tables look like.
* **Click on the Index Provider tab**.
  + The Index Provider report groups reports represented by hyperlinks. Click on a specific hyperlink to review information about your patient.
    - Under the Vitals and Flowsheet Data section, **click on Vitals report**. This report displays historical vitals.
* **Click on Chart Review**.
  + If you want to review past AND present information about a patient, use the Chart Review activity.
  + Take a moment to **click through the tabs in Chart Review**.
    - Note how when you single-click on an item, a summary report populates to the right.
* **Click Results Review.** 
  + The Results Review activity shows a summary of a patient's lab and imaging results organized into groups.
    - This activity defaults to displaying all results. However, if you want to see a specific group of results, just click on that group.
    - If you need to see the Reference Range, hover over the result or click on the Ref Range button in the toolbar.
    - Notice the results are initially bolded. When you have finished reviewing results, you can click on the Time Mark button. This will remove the bolding from your results. The next time you review results, only new results will be bolded.
* **Click Problems Activity** for the Problem List.
  + The Problem List allows you to view a patient’s current medical problems, record new medical problems, and document resolved problems.
  + Add a problem here of **Pneumonia** and fill in all the Mearningful Use items (Principal Problem, Present on Admission) and **Accept**.
  + Click **Mark as Reviewed** to indicate that area of the chart is updated to the best of your knowledge at this time.
* **Click History.**
  + **Click on each of the sections** to review the patient’s history.
  + **Click Mark as Reviewed for each that you review.**
* **Click Notes**.
  + If you want to review or create Notes for a patient’s current hospitalization, you can do so in the Notes activity.
  + The Notes activity is organized by tabs just like Chart Review. However, the difference is, that the Notes activity only focuses on notes. You can review All Notes, or you can focus/filter on a specific type of note, for example, an H&P Note.

## Write a Note

* Click on the **New Note** button.
* You need to identify the type of note to create.
  + Click on the **magnifying glass** in the **Type** field in the right pane.
  + Double-click on **Progress Notes**.
* To make documenting notes easier, Epic has created SmartTools to assist you.
  + SmartText are created by Aspirus administrators.
  + SmartPhrases are created by Aspirus or you.
  + To search for a generic SmartText, **click in the Insert SmartText field.**
  + Enter **progress note** and press **Enter**. Graphical user interface

    Description automatically generated with low confidence
  + Double-click **Progress Note IP General AWH.**
* With your cursor located at the beginning of your note, use the F2 key on your keyboard complete each SmartTool.
  + **Press F2** to navigate through the note. (Remember, you can also use the small yellow arrows in the note toolbar to navigate through this note.)
  + Type some **Subjective** information of your choice.
  + **Press F2 again**. This next SmartTool is a SmartList which presents a list of choices.
    - A SmartList might have a blue or yellow background. A blue background allows you to pick multiple selections, and yellow background allows for only one selection.
    - This SmartList has a blue background. **Make your selections** by clicking with your left mouse button. When you are done making your selections, press your right mouse button while within the SmartList to insert into your note.
    - **REMEMBER: left-click to pick and right-click to stick.**
  + **Select a couple of systems** with your left mouse button. Press your right mouse button to insert into your note.
  + You are automatically forwarded to the next SmartList.
* The next SmartList has a yellow background. Remember, you are allowed only one selection. On your own, complete the Physical Exam.
* **Complete the remainder of the note**.
  + Notice that patient information was automatically pulled into your note. That means SmartLinks are included in this SmartText. SmartLinks are key words that pull in information from the patient’s chart. i.e. Labs, imaging results, etc.
* Always **press F2** one more time when you are done to ensure you have completed all of the SmartTools. You will see an error message if not all the SmartTools have been completed in the note. F2 will take you to the ‘missed’ area. You cannot sign the note until all of these are addressed. (Wildcards may be deleted)
* Click on **Sign when complete.**

## Editing Your Note

* **Select your note from the Notes actvity**.
* Click the **Addendum** button.
* Make a change to the note.
* Click **Sign.**

# Orders

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| Scenario   * Patient: **Paul** –Rounding for Paul – add new orders. * Focus: Entering, Modifying, and Discontinuing Orders. * **Add your Paul patient to your All My Patients list and Assign Me**. |

## Placing New Orders

* **Click Orders button on Paul’s row, or Open Paul’s chart and Click Orders Activity.**
  + Dismiss any BPAs.
* In the **Place new orders or order sets field,** type **Foley catheter to gravity** or use completion matching by only typing partial words.

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* Press **Enter.**
* Double-click **Foley catheter to gravity**.
* Notice that this order has more choices for Frequency. Find a different Frequency by clicking on the magnifying glass.
* Notice the red stop sign in the Reason field. A red stop sign means that you are required to complete this field.
  + Select **Appropriate Perioperative Care**.
  + Click **Accept.**
* Time to order a new medication. In the **Place new orders or order sets field,** type **Dilau**.
* Press **Enter**.
* We are looking for the oral Hydromorphone (DILAUDID) order.
  + The order is on our Preference List tab. If it was not, you would click the **Facility List** to check there.
* Double-click to select the **oral** Hydromorphone (DILAUDID) order.

\*Always **review the Route column** to ensure you have the correct route.

* **Choose your Dose** and **PRN Reason.**
* Click **Accept.**
* Finally, let’s place a consult order.
* In the **Place new orders or order sets field,** type **card con.**
* Press **Enter.**
* **Select Cardiology Consult**.
* Click on the order in your sidebar to open the Order Composer.
  + Even though there are no red stop signs, it’s important to indicate in this order who you spoke to (provider to provider communication is required for consults) as using this field enhances communication with the nurses and the HUC.
* Type **Luetmer** in the **To** field.
  + Press **Enter.**
  + **Click on Luetmer, Paul Aspirus Cariology Clinic, Wausau.**
* Click **Accept.**
* **Review** each order in your sidebar.
  + NOTE: If you need to delete an order, hover over the order and click the X. To favorite an order, click the white Star and accept the window that pops up.
* Click **Sign**.

## Modifying and Discontinuing Orders

* You want to change the patient’s Dilaudid order from 2mg to 4mg.
  + Click on **Orders activity if you are not already there.**
  + Locate the Dilaudid order.
  + Click **Modify** next to the order.
  + Click **4mg** for the Dose.
  + Click **Accept.**
    - Notice the Modified order is in the Orders sidebar.
* You want to Discontinue the PRN Codeine-Acetaminophen order.
  + Locate the order.
  + Click **Discontinue** next to the order.
    - Notice the Discontinued order is in the Orders sidebar.
* Review the Orders for accuracy and click **Sign.**
  + Notice the orders in the Active tab are now updated.
* Close the patient’s chart.

# Admitting a Patient

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| Scenario   * Patient: **Elliot** is in the ED and you are admitting him for appendicitis. * Focus: Using the Admission Navigator. |

* **Search for then Open Elliot’s chart** the same way you’ve done already**.**
  + The first time you open an ED patient’s chart\*, it opens to the Review Visit navigator. This navigator displays the charting, orders and results for the patient during their Emergency visit. This is beneficial to you as a provider because you can quickly review their information. **Scroll through Elliot’s ED visit**.

\*For ED patients only, the first time you open a chart, you will need to add the Admission navigator to the Activity bar. You only need to do this once.

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* Click on the tab with the **down arrow** in your activities.
* Hover over **Admission** selection.
* Click on the **white star**. This will keep the tab available all the time now.
* Click on **Admission** **activity tab**.

## Problem List

* In the navigator, Click **Problem List.**
* In the **Search for new problem** field, type **append**.
* Press **Enter**.
* Double-click **Acute Appendicitis**.
* Check the box to mark it as the **Principal Problem.**
* **Present on Admission: Yes**
  + To add the diagnosis to the patient’s medical history, click on **Add to Hx**.
* Click **Accept.**
* Click **Mark as Reviewed.**

## Allergies

* Click **Allergies** in the navigator.
* Review the patient’s allergies.
* In the **Add a new agent** box type **Sulfa**.
* Press **Enter**.
* Double-click on **Sulfa Antibiotics**.
* In the **Reactions** box, click on the **magnifying glass**.
* Choose **Gastrointestinal Intolerance**.
* In the **Reaction type** box, click on the **magnifying glass**.
* Choose **Intolerance**.
* Click **Accept.**
* Click **Mark as Reviewed**.

## History

* Click **History**.
* Review the patient history.
* Click **Mark as Reviewed**.
  + If you identify additional history, you can document it in this section.

## Admission Orders – Review Home Medications

* Click on **Admission Orders** in the navigator. This is the med rec.
  + The Admission orders med rec section is divided into 3 distinct steps. Prior to those 3 steps is the **Review Home Medications** tab. This allows you to review the patient’s home medications and when they took the last dose.

## Admission Orders – Review Current Orders

* Click **1. Review Current Orders**.
* Because Elliot is currently in the ED, review all of the ED orders and decide which of these orders to continue to the IP unit. Please note that the orders sidebar states in red, **Review Current Orders is Incomplete**.
* On your own, go through each of the orders and document Continue, Discontinue, Modify or Reorder.
* Once the Status of the orders reflects **Review Current Orders is Complete** in green in the sidebar, you are ready to move on to Step 2.

## Admission Orders – Reconcile Home Medications

* Click **2. Reconcile Home Medications or Next at the bottom of the page.**
  + You must address each medication on the list and decide whether to Order, Don’t Order, Replace or Remove.
* **Albuterol** Nebulizer Solution: Click **Order**
  + **Inhalation**
  + PRN reasons: **Shortness of Breath/Wheezing – Use 1st**
  + **Accept.**
* **Multiple Vitamins-Minerals**: Click **Don’t Order**
* The next tab over is **Restart from Previous Admission**. Here, you have the opportunity to reorder meds from the patient’s previous admission. You are not required to reconcile these orders. They are only here for your convenience to choose if desired. Move past this tab.

## Admission Orders – New Orders

* Click on **3. Order Sets**.
* In the **Place new admission orders** field, type **admission** and press **Enter**.
* Scroll down and double-click on **AWH Admission Orders.**
  + FYI - Your location will have their own Admission Order Set created.
* In the General section, select **Admit Patient to Inpatient**.
  + Enter the Reason for Admission/Hospital Problem.
    - Search for **Appendicitis**.
    - Select the unit the patient is going to. Click **Med/Surg Intermediate Care**.
    - Select whether or not the patient should be sent to an overflow unit.
    - Click **Accept**.
* Taking into consideration that the patient is being admitted with Appendicitis, select more orders for this patient. Remember to fill in information when you see a red stop sign.
* At the bottom of every order set is an **Ad-hoc Orders** section. This is where you enter additional orders that are not listed in the order set.
  + Click on Ad-hoc Orders and **enter an order of your choice**. (i.e. Tylenol or aspirin)
* When you have the orders you need, click **Sign & Hold – Will be initiated by Receiving Unit.**
  + Once the patient transfers to that unit, the nurse will release the orders.

## Expected Discharge

* In the navigator, Click on **Expected Discharge**.
* Expected Discharge Date: **t+3** (or use the calendar icon)
* Expected Discharge Time: **Morning**
* Discharge Location & Destination: **Home**

## H&P Note

* Click **H&P Note**.
* Click in **Insert SmartText field**.
* **Type H&P**.
* Press **Enter**.
* Double-click on **Admission H&P**.
* Complete the H&P on your own. Use the F2 or yellow arrows on the toolbar to complete the note.
* When completed, click **Sign**.

## Charges

* Click **Charges**.
* Click **Inpt Admits.**
* Select **Initial Hospital Care Level 2**.
* Scroll down and click **Accept Charges**. If you are presented with a pop-up for diagnosis association, checkmark the appropriate one.
  + TIP: If you ever need to delete a charge, click the X on the right end of the row.

# Consults

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| Scenario   * Patient: **Paul,** cardiology consult note completion * Focus: Using the Consult Navigator. |

## Creating a Consult Note

* Open Paul’s chart from the Cardiology Consult system list found under Available Lists > Consults by Specialty > Cardiology
* Today you are a cardiologist. Click on **Consult Pre-Procedure** Activity navigator.
* Click **Consult Notes**.
* In the note, **click the box next to Cardiology consult**.
  + This is how you must associate the consult order to the consult note.
* Click in the **Insert SmartText** field.
* Type **consult** and press **Enter**.
* Double-click **Consult General AWH**.
* Complete the note and click **Sign**.

## Charges

* Click **Charges**.
* Click **Inpt Consults.**
* Select appropriate charge.
* Scroll down and click **Accept Charges**.

# Transferring a Patient

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| Scenario   * Patient: **Edward,** transferring from ED to floor * Focus: Using the Transfer Navigator. |

## Order Reconciliation

* **Search for then Open Edward’s chart**.
* Click **Transfer** navigator.
* Click on **Orders Rec** section.
* Work through Order Reconciliation just like you did for the Admission process.
  + 1. Review Curent Orders
  + 2. Reconcile Home Meds
  + 3. Order Sets (use the AWH Rounding Order Set) or add orders as appropriate outside of the order set. The transfer order is in the sidebar automatically to complete.
  + Sign all orders and close the chart.

# Discharging a Patient

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| Scenario   * Patient: **Peyton** * Focus: Using the Discharge Navigator. |

## Discharge Orders – Review Orders for Discharge

* **Open your Peyton patient.**
* Click **Discharge Activity**.
* In the Discharge Navigator, Click **Discharge Orders**.
* Step 1: Review Orders for Discharge
  + For this step, review what home medications the patient should resume and which inpatient medications should be prescribed.
* For Peyton’s **Home Medications**, click **Don’t Prescribe** the **Albuterol** and **Cetirizine**.
* **Click the arrow to Continue** the remainder of his **Home Medications**.
  + This automatically discontinues the associated inpatient orders so duplications don’t occur.
* For his **Inpatient Medications**, select the plus sign to **Prescribe the Codeine-Acetaminophen** order.
* For the remainder of the orders, click **Don’t Prescribe.**

## Discharge Orders – Order Sets

* Click **2. Order Sets**.
  + Enter the patient’s discharge orders. Please note that the Discharge Patient order is already defaulted in the sidebar. Complete the required/recommended information in the order.
* Notice the **Aspirus Discharge Orders** order set is already defaulted for you also under **Order Sets > suggestions**.
* Click **Open Order Sets**.
* Under the Discharge section, click **Discharge – Activity**.
* Select **Normal activity as tolerated**.
* Select **Do Not Drive while taking pain medication**.
* Open each section and place some orders.
* The last step is to review all of the discharge orders and Sign them.
  + Click **Sign-Print and/or E-prescribe Now.**
* If you see the Associate Diagnosis box, associate the order with the appropriate diagnosis and Accept.
* Click **the appropriate diagnosis** column heading.
* Click **Accept**.
* The **Pharmacy Search** box appears next. Since no one added a pharmacy to this patient’s chart, the system recognizes that there is no pharmacy for e-prescribing. Customarily, the nurse will document the patient’s pharmacy of preference during their admission process. However, the patient may request their prescriptions transmit to a different pharmacy.
  + - In the **Name** field, enter **walgreens**.
    - Select any Walgreens that appears.
    - Click **Accept twice.**

## Problem List

* Back on the navigator, Click **Problem List.**
* **Resolve** Hypoxia.

## Discharge Summary

* Click **Discharge Summary**.
* Type **Discharge** in the SmartText search box, and press Enter.
* Double-click **Discharge Summary**.
  + Press [F2] key or yellow arrows to navigate through the note.
  + Remember: “Left to pick, right to stick!” (you can also double-click to stick)
* **Sign.**

## Enter Charges

* Click **Charges**.
* Click the **Inpt** **Discharge** heading.
* Click **Hospital Discharge Day More Than 30 Minutes.**
* Click **Accept Charges**.
* Close chart.