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# Procedure Visit Exercise

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| [http://tse1.mm.bing.net/th?&id=OIP.M1b66c4f9a0fe8c9c6dad2fd57d68fecaH0&w=168&h=168&c=0&pid=1.9&rs=0&p=0&r=0](http://www.bing.com/images/search?q=patient+icon&view=detailv2&adlt=STRICT&id=533303B2F9FFCDE8578DA02504986685F1E009BE&selectedIndex=3&ccid=G2bE%2baD%2b&simid=608028415243584864&thid=OIP.M1b66c4f9a0fe8c9c6dad2fd57d68fecaH0) | You are preparing to remove Steven’s lesion. While your nurse prepares the lidocaine and procedure supplies, place the order for the Lesion Removal and document a diagnosis. |

## Part 1: SmartSets

Double click Steven.

In the SmartSet section, select the box next to **ACI - Skin Procedure**.

Click Open SmartSets.

In each of the categories make the following selections:

Procedures > EXCISION BENIGN TRUNK ARM LEG: **EXC SKIN BENIG <5mm TRUNK, ARM LEG** [11400]

Diagnosis: **Skin Lesion**.

Disposition: **Return in 1 week**.

Next to Return in 1 week, click **Details**.

In the Return For field type **suture removal**.

Click **Accept.**

LOS: **UNLISTED E/M SERVICE [99499]**.

To finalize the selections you have made, scroll to the bottom of the SmartSet and click **Sign**.

When you are presented with the Associate Diagnoses**,** select **Skin lesion**.

Click **Accept**.

## Part 2: Document a Procedure Note

* In the sidebar on the right side of the screen find the Insert SmartText field.
* Type **Procedure** and hit enter.
* Select the Procedure Excision Skin Lesion option.
* Click **Accept**.
* Press **F2** and type **3 months** so that the sentence reads **This lesion has been present for 3 months****.**
* Press **F2** again to go to the Objective and Assessment areas of the note. 
  + Document something in each of these areas.
* Press **F2** until your cursor is after Lidocaine. Type **with** to indicate that you used Lidocaine with Epinephrine.
* Click **Accept** and close Steven’s chart

# Family/Internal Medicine Exercise: Worker’s Comp. Visit

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| --- | --- |
| [http://tse1.mm.bing.net/th?&id=OIP.M1b66c4f9a0fe8c9c6dad2fd57d68fecaH0&w=168&h=168&c=0&pid=1.9&rs=0&p=0&r=0](http://www.bing.com/images/search?q=patient+icon&view=detailv2&adlt=STRICT&id=533303B2F9FFCDE8578DA02504986685F1E009BE&selectedIndex=3&ccid=G2bE%2baD%2b&simid=608028415243584864&thid=OIP.M1b66c4f9a0fe8c9c6dad2fd57d68fecaH0) | Tim twisted his left knee at work. You plan to order a knee x-ray with 4 views, have the patient wear a brace for 6 weeks, and prescribe Ultram. |

## Part 1: Placing Worker’s Comp Orders

* Within the Visit Taskbar order the x-ray. 
  + Type **Knee xray** and select the option of **XR Knee LT 4V or More Views (XRAY)** [XR0079].
  + Click **Select & Stay**.
* Search **DME Brace**. 
  + If the order you are looking for does not appear on the Preference List, remember that you can expand your search by selecting Facility List.
  + When you are ordering items that the patient will need to get from a medical equipment supplier, type DME in the search field and the name of the supply. I.e. DME Nebulizer.
  + Click **Select & Stay.**
* Lastly, search **Ultram** and select **tramadol (ULTRAM) 50 mg tablet**.
  + Click **Select & Stay**.
  + Click **Accept**.
* For the XR hard stop (Stop Sign icon):
  + What is the patient’s sign or symptom? **Knee sprain**.
* Practice changing the order details: tramadol (Ultram) 50 mg tablet
  + Dose: **50mg**.
  + Route: **Oral**.
  + Frequency: **Every 8 hours as needed**.
  + Dispense: Quantity: **60 tablets**.
  + Refills: **0**.
  + Class: **No Print**.
* Brace:
  + Length of need: **6 weeks**.
  + Use the F2 button on your keyboard to address all Wild Cards (\*\*\*) in the note section at the bottom of the order composer.
  + Click **Sign Orders**.
  + If you receive a PDMP Best Practice Advisory, go ahead and click **Accept**.
* When presented with the Associate Diagnoses window, click the **diagnosis** to associate all.

## Part 2: Completing a Worker’s Comp Visit

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| [http://tse1.mm.bing.net/th?&id=OIP.M1b66c4f9a0fe8c9c6dad2fd57d68fecaH0&w=168&h=168&c=0&pid=1.9&rs=0&p=0&r=0](http://www.bing.com/images/search?q=patient+icon&view=detailv2&adlt=STRICT&id=533303B2F9FFCDE8578DA02504986685F1E009BE&selectedIndex=3&ccid=G2bE%2baD%2b&simid=608028415243584864&thid=OIP.M1b66c4f9a0fe8c9c6dad2fd57d68fecaH0) | To finalize Tim’s visit, you will provide instructions on how to care for his injury. |

* Go to the **Wrap-Up** activity.
* Click **Go to Clinical References**. 
  + Look through the Relevant Documents and single click **ADULT ADVISOR: KNEE SPRAIN (ENGLISH)**.
  + Click **Add to Patient Instructions**.
* Click the **Wrap-Up** activity and enter the following:
  + LOS: **99214**.
  + Follow-up: **6 weeks**.
    - Enter a Check-out note: **Patient will need his follow up appointment on a Wednesday due to work**.
    - To CC another provider click **Add PCP**.
    - Click **Send Now**.

## Part 3: Writing a Worker’s Comp Note

* Click **Notes**.
* In the Insert SmartText field, type **knee** press **Enter**. 
  + Select **ACI ADULT KNEE PAIN – TRAUMATIC**.
  + Click **Accept**.
* Proceed to work through the note making the selections you would like. 
  + Use **F2** to move between fields.
  + Address the Wildcards by replacing them with free text or deleting and fill out all SmartLists.
  + Make sure all unfinished variables have been addressed.
* Click **Accept**.
* Click **Sign Visit**.
  + Note: You may need to add a **Visit Diagnosis**. If so, go back to the **Plan** activity and add Knee Sprain as a Visit Diagnosis.
    - You may add the Knee Sprain to the **Problem List**, also.
    - Mark the Problem List as reviewed once completed.

# Pediatric Specialty Exercise: Well Child Visit

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| [http://tse1.mm.bing.net/th?&id=OIP.M1b66c4f9a0fe8c9c6dad2fd57d68fecaH0&w=168&h=168&c=0&pid=1.9&rs=0&p=0&r=0](http://www.bing.com/images/search?q=patient+icon&view=detailv2&adlt=STRICT&id=533303B2F9FFCDE8578DA02504986685F1E009BE&selectedIndex=3&ccid=G2bE%2baD%2b&simid=608028415243584864&thid=OIP.M1b66c4f9a0fe8c9c6dad2fd57d68fecaH0) | You discuss Michael’s Growth Chart with his parents. As you continue to speak with the parents you open the Well Child SmartSet to begin documentation. |

## Part 1: SmartSets

* Click **Plan**.
* In the SmartSets section under Suggested SmartSets. Select **ACI – Well Child**.
* Click **Open SmartSets**.
* In the Documentation section select **Well Child 2 Year with Defaults.** In the following sections, choose:
  + Labs: **CBC, Complete Blood Count**.
  + Keep the selection for Lead, Blood Venous.
  + 2 Year Immunizations: **Varicella**.
  + INFANT-CHILD IMMUNIZATIONS: **INFANRIX (AGES 6 WEEKS TO 7 YEARS)**
  + Diagnosis: leave the three diagnoses that show by default.
  + Address the yield sign by selecting **without abnormal findings**.
* Click **Accept**.
  + Disposition: leave the default of PI Growth Chart Percentiles < 2 YO.
  + LOS: leave the default of PREVENTATIVE, VISIT, EST, AGE 1-4 [99392].
    - If you get a pop-up, review the text, and click Accept to bypass.
* When the Associate Diagnoses window appears, associate all remaining orders with the routine child health exam diagnosis. Click **Accept.**
* Click **Wrap-Up**. 
  + In the Follow-Up section select **1 Year**.
* Close Michael’s chart.

# Family/Internal Medicine Exercise: Medicare Visit

## Part 1: Using the SmartSet

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| --- | --- |
| [http://tse1.mm.bing.net/th?&id=OIP.M1b66c4f9a0fe8c9c6dad2fd57d68fecaH0&w=168&h=168&c=0&pid=1.9&rs=0&p=0&r=0](http://www.bing.com/images/search?q=patient+icon&view=detailv2&adlt=STRICT&id=533303B2F9FFCDE8578DA02504986685F1E009BE&selectedIndex=3&ccid=G2bE%2baD%2b&simid=608028415243584864&thid=OIP.M1b66c4f9a0fe8c9c6dad2fd57d68fecaH0) | Nancy is here for her Welcome to Medicare Visit. You will use the Medicare SmartSet. |

* In the **Plan** tab, within the SmartSet section under Suggestions, select **ACI- MEDICARE PREVENTIVE / WELLNESS VISITS** and click **Open SmartSet**. 
  + The Medicare SmartSet is valuable because it contains pertinent information for the initial Medicare visit and Medicare Annual Wellness visits. This ensures staff is covering necessary screenings and assessments and provides documentation for coverage and billing.
* Select the following:
  + Documentation: **ACI FEMALE MEDICARE PREVENTIVE / WELLNESS W/O EXAM**.
    - Leave all other defaulted items as is.
* Click **Sign**.

## Part 2: Writing a Medicare Note

* Click into the Note that you have created in sidebar on the right side of the screen. 
  + Notice the Nursing Note is automatically pulled into your note containing important information collected by nursing staff. You should review this information for accuracy as this is now part of your documentation. Other important links are also automatically populated for complete billing documentation.
* To begin note documentation, press **F2**.
  + Practice completing the note.
* Upon note completion, click **Accept**.
* Close Nancy’s chart.

# Obstetric Specialty Exercise: Routine Prenatal Visit

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| [http://tse1.mm.bing.net/th?&id=OIP.M1b66c4f9a0fe8c9c6dad2fd57d68fecaH0&w=168&h=168&c=0&pid=1.9&rs=0&p=0&r=0](http://www.bing.com/images/search?q=patient+icon&view=detailv2&adlt=STRICT&id=533303B2F9FFCDE8578DA02504986685F1E009BE&selectedIndex=3&ccid=G2bE%2baD%2b&simid=608028415243584864&thid=OIP.M1b66c4f9a0fe8c9c6dad2fd57d68fecaH0) | Melissa is scheduled for a routine prenatal visit. |

## Part 1: Episodes of Care

* Back on your Schedule screen, double-click to open your Melissa patient’s appointment.
* Click the **Episodes** tab/activity to review the patient’s pregnancy specific information.
  + If you do not see the Episode, click **Select** **Episode**.
  + Click the **Resolved** check box.
  + Select the New Pregnancy Episode and click **Accept**.
  + Delete the date from the Resolved box.
    - This will reactivate the Episode.
    - Note that today’s appointment is now linked to the Episode in the **Linked Visits** section below.
* Navigate back to the Episodes activity and click the **Dating** section.
  + Notice the last menstrual period (LMP).
* Document that the patient had an ultrasound 3 days ago and the baby was measured to be 14 weeks 4 days. 
  + Ultrasound: **t-3**
  + GA: **14w 4d**
    - You feel this is a more accurate delivery date.
    - Select the radio button by the EDD.
* Go to the **OB Providers** section.
  + The patient indicates Dr. Mary E. Anderson is her Perinatologist.
* Use your F8 key to move down to the **Prenatal Physical** section and practice documenting an exam. 
  + Notice the **Mark All Normal** button which can be used to quickly select Normal for all items.
  + Practice documenting breast tenderness by selecting **abnormal** next to Breasts and clicking the paper icon to add a comment: **tender**.
* Review the sections OB/GYN/Social History, Prenatal Problem List, Pregnancy Overview and Plan and Birth Plan to see the information that has been documented.
  + Add any additional documentation as necessary.

## Part 2: Prenatal Vitals

* Click the **Rooming** activity and review the information the nurse has documented.
* Click **Prenatal Vitals and Notes**. 
  + This section is uniquely designed for the prenatal encounter.
  + Review the information the nurse has documented.
* In the row for today, document the following: 
  + Fetal heart tone (FHT Baby 1): **149**.
  + Notes: **GA 15w and states she is doing well**.
  + The Results Console section displays the pregnancy related labs.
* Click **OB Education**. 
  + Add today’s date under 12 -16 Weeks (enter ‘t’ for today)
  + In the 12-16 Weeks section record that you educated the patient on **Second Trimester Growth** and **Quickening**.

## Part 3: Updating the Problem List

* Click the **Plan** tab
* Document the following in the Problem List:
  + Search for new problem: **Pregnancy.**
  + Select **Supervision of normal first.**
  + Click the **unspecified trimester** button below**.**
  + **[Z34.00]** should be the recorded diagnosis code.
  + Check the box under **Linked**.
* Add this problem to the Visit Diagnosis.
  + Click the **Green Plus** icon.
  + Click **Mark as Reviewed**.

## Part 4: Wrapping up the Visit

* Navigate to **Wrap-Up**.
* In the Follow-up section, select **4 weeks**.
* To see the pregnancy episode click **Chart Review**.
* Click once on the line for the New Pregnancy episode.
  + Scroll through the pregnancy report to easily see all the information that is related to this pregnancy.
* Click **Sign Visit**.

# Surgical Specialty Exercise: Placing Orders Prior to Admission or Surgery

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| [http://tse1.mm.bing.net/th?&id=OIP.M1b66c4f9a0fe8c9c6dad2fd57d68fecaH0&w=168&h=168&c=0&pid=1.9&rs=0&p=0&r=0](http://www.bing.com/images/search?q=patient+icon&view=detailv2&adlt=STRICT&id=533303B2F9FFCDE8578DA02504986685F1E009BE&selectedIndex=3&ccid=G2bE%2baD%2b&simid=608028415243584864&thid=OIP.M1b66c4f9a0fe8c9c6dad2fd57d68fecaH0) | Gabby is scheduled for an upcoming procedure at the hospital. |

# Graphical user interface, text, application, chat or text message Description automatically generatedUsing a Pre Admit Orders Encounter

* Click **Pre Admit Order Enc** from the Epic toolbar or, use **Chart Search** by typing ‘pre’ and waiting for the option to appear.
* Look up your Gabby patient using the “3, 3 method”
  + 3 letters of the last name, 3 letters of the first name
    - Also a good idea to validate using the patient’s DOB and Sex/Gender, when available.
* Choose your Gabby patient from the list and click **Select**.
  + **Note:** Providers: Skip to step 4, you will not see this pop-up.
* Nursing Staff-only: In the pop-up, enter the Ordering Provider, their Department and click **Accept**.
  + The encounter opens
* Graphical user interface, text, application, email

  Description automatically generatedIn the **Pre-Hosp Orders** activity tab, go to the **Order Sets** section.
* In the Search field type, ‘pre-op’ to see a list of the the available Preoperative Order Sets.
  + Note: you can also search by the specific procedure being performed to see what is available also.
  + i.e. ‘Broncho’, “Uro’, ‘repair’, etc.
* Select an applicable Order Set and click **Accept**.
* Click **Open Order Sets**.
  + If you selected the wrong order set, click **Remove Open**.
* Under Orders, select the appropriate orders and address any stop signs/hard stops that appear.
  + If the patient is going to be admitted, be sure to select the Admit to Inpatient order.
  + Users have the ability to enter additional order not contained within the Order Set using the **Ad-hoc Orders** section toward the bottom of the screen.
* Click **Sign & Hold Orders**.
  + **Note:** All orders are held until the provider signs them from their In Basket Second Sign Needed folder.
    - At that time, the orders are Signed & Held again until the patient arrives for the procedure and the nurse releases the orders necessary for patient care.
* Complete all necessary instructions in the Review Phase of Care window.
  + Associate any remaining order to a **Pre-Op** status.
  + Enter **pre-procedure** for Sign and hold reason
  + Enter *any procedure* in the last prompt.
    - Note: If a Case were already scheduled, you would be able to select it here. Gabby does not have a Case scheduled in the training environment.
* Click **Accept**.
* Bypass the Order Validation pop-up window by clicking **Accept**.
  + If necessary, associate a Provider’s name to the orders.
* Click **Sign Encounter**.
  + Note: If the visit is not signed, or the encounter closed, the provider will receive an Open Chart message in their In Basket.

# Modifying or Adding Additional Signed & Held Orders

* + Graphical user interface, application

    Description automatically generatedNote: Non-providers do not have security to modify Signed & Held orders. Modification or removal of existing orders should be communicated to the provider.
* Open Gabby’s chart using the **Chart** option on your Epic Hyperspace Toolbar.
  + Hint: Use the **Recent Patients** tab
* Locate the **Preproc Orders** encounter within Chart Review.
* Right click on the encounter, select **Edit or Addend Encounter**.
* Select **Create Addendum**.
* Place new orders in the **Pre-Hosp Orders** activity, under Order Sets or Orders.
* Graphical user interface, text, application, chat or text message

  Description automatically generated**Sign Addendum** upon completion.
  + Note: If the case was cancelled, or perhaps you simply entered orders for the incorrect patient/procedure, Discontinue pre-op orders by clicking on the **Select/Release Sign and Held Orders** button within the Pre-Hosp Orders tab.
  + Click **Discontinue All**.
  + To DC just one order, or several, click the green **New** icon on the far right side of the screen and select Discontinue (or Modify).