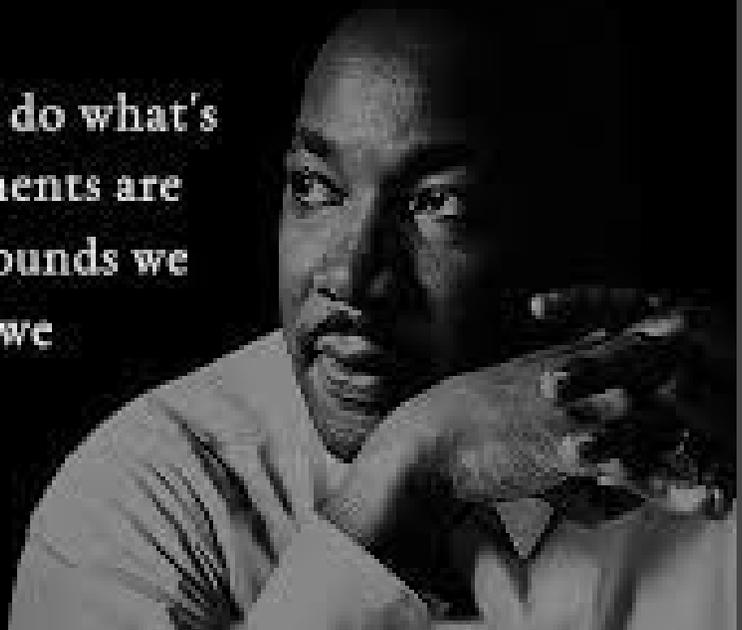# HAPPY new year

Epic PROVIDER
A Newsletter for Live Site Providers

For RWJBH and Rutgers Providers Live on Epic

January 10, 2024

Never, never be afraid to do what's right... Society's punishments are small compared to the wounds we inflict on our soul when we look the other way.

Martin Luther King Jr. / @InspiringThinkr

IMPORTANT: Monday January 15 is Martin Luther King, Jr. Day, an RWJBH and Rutgers corporate holiday. Some practices and offices may be closed in observance of the

holiday.

If you will be off on Monday, please set your Outlook out-of-office assistant before signing off on Friday, January 12!

Provider Top Stories

Attn: Physician Leaders and Practice Managers! Share these key items in your meetings:

Ambulatory and Inpatient Providers:

- Take advantage of **Epic's Provider SmartUser Program** to save you time.
- Reminder: **Provider Photo help is here**!

Inpatient Providers:

- **Reminder: Sign into Provider Care Teams!** This ensures you are notified of important patient care needs and updates, so accuracy is critical.

Ambulatory Providers:

- Auto-Refresh of Notes allows SmartLinks to auto-refresh whenever you sign a note!
- **Reminder:** Use Pre-Charting to save time and prepare for future encounters.

Coming Soon: Exciting Epic Enhancements

Preview Next Week's Epic Enhancements!

- The following **Epic Enhancements** will be in Production on Tuesday, January 16!

- **Click here to review details about these Epic Enhancements, including screenshots.**

- **Click here to learn more about the Epic Enhancement Process and how to submit an Epic Enhancement request!**

- **Thank you to the Epic Together Project Team for these amazing enhancements!**

Provider Wellness: Become an Epic Top Performer with Epic's Physician SmartUser Program

- *Spend less time in the chart.*
- *Earn free CME credits (attending virtual, live webinars)!*
- *Gain a highly valuable Epic Certification supported by RWJBH.*

Epic's Physician SmartUser Program is a series of 1-hour classes covering over 150 tips and tricks that show you how you can get the most out of Hyperspace in *less time*.

- These **free, live, virtual 1-hour webinars** are worth the time and effort invested!
    - Smart User Courses are customized for provider specialties, such as Ambulatory, Emergency, Inpatient, OB, and Surgeon.
    - Each 1-hour course will include 45-50 minutes of lecture, with the remaining time dedicated to Q&A and independent exercises.
    - Each 1-hour course qualifies for 1-hour of AMA PRA Category 1 CME Credit™.
    - **Complete eight SmartUser courses to earn an Epic Physician SmartUser Badge**.
        - This is a highly valued certification!

- [Click here to review the Smart User Frequently Asked Questions (FAQ)](#).
- To learn more about **Epic's Physician SmartUser Program**, including registering for a virtual SmartUser course, [click this link below](#) or scan the QR Code from your phone.
- Click here for help with requesting an Epic UserWeb

Account.

Below please find a listing of the Epic Physician SmartUser Course Offerings:

- **MD201v: Introduction**: For physicians who want to get started with the SmartUser program, learn about Signal, gain access to a special training system, a sample of 7 tips, manage your learning using EpicU.
- **AMBMD202v: Ambulatory Quick Wins**: Set up your workspace, optimize the schedule, hide buttons you rarely use, optimize diagnosis entry, and learn quick and easy note tips.
- **EDMD202v: Emergency Department Quick Wins**: Set up your workspace, optimize Track Board, hide buttons you rarely use, and learn efficiency tips for the Dispo activity.
- **IPMD202v: Inpatient Quick Wins**: Set up your workspace, optimize and build Patient Lists, optimize Notes, and learn In Basket efficiency tips.
- **OBMD202v: OB Quick Wins:** Set up your workspace, optimize the schedule and the Grease Board, learn quick tips for speeding up your notes, and efficiently use orders and Order Sets.
- **SURMD202v: Surgeon Quick Wins:** Schedule management and cost receipts, manage your Order Sets, manage Phases of Care, use mobile tools, create reports using SlicerDicer, and track performance using the OR Surgeon Scorecard.
- **MD203v: Reviewing the Chart:** Personalize Chart Review, Snapshot, and Result Review, use Synopsis effectively, and maximize time by charting before the patient arrives.
- **MD220v: Introduction to SmartTools:** Learn SmartTools terminology, find and use SmartTexts, SmartLists, and SmartLinks. Create, edit, and share your SmartPhrases.
- **MD224v: SmartTools Part 1:** Use basic and advanced SmartLinks to populate patient information like recent labs, and see how to embed SmartLinks in your SmartPhrases.
- **MD225v: SmartTools Part 2:** Create basic and advanced SmartLists, and see how to set your own default selections in a list.
- **MD206v: Orders:** Use keyboard shortcuts, create basic and advanced preference lists, edit multiple orders at once, create a user order panel,

and create and edit user SmartSets and Order Sets.

- **IPMD206v: Inpatient Orders:** Use shortcuts to quickly enter orders, manage personal inpatient preference lists, manage user Order Sets, and create order panels.
- **MD207v: In Basket:** Sort and filter In Basket, update the In Basket layout based on your preferences, create and use QuickActions, use In Basket to support team-based care, and search In Basket.
- **MD208v: Reporting:** Monitor your patient population by understanding how to effectively use the Reporting Workbench.
- **MD209v: Mobile iOS**: See how mobile devices fit in with your workflows. Understand what mobile tools are available on Canto, Haiku, Unified Communications, and Limerick for iOS.
- **MD210v: Mobile Android:** See how mobile devices fit in with your workflows. Understand what mobile tools are available on Haiku and Unified Communications for Android.
- **MD211v: NoteWriter**: Use NoteWriter SmartLinks, create and manage macros, leverage patient-entered data, and report on SmartData elements.
- **MD212v: SlicerDicer**: Monitor your patient population by understanding how to effectively use SlicerDicer.
- **MD230v: Efficiency Metrics:** Find Epic usage metrics, explain how changes in user settings can impact the metrics, and identify areas where additional training may have an impact.

IMPORTANT NOTE ABOUT THESE COURSES:

- The Introduction course is for everyone.
- Choose the appropriate, additional courses that are right for you.

Provider Photos in Hyperspace

If you need a photo in Epic, or to update your current picture, The Epic Together Digital Team will be happy to assist you!

Please note, Provider photos must meet the following criteria:

- Formal headshot in a white coat or professional attire and a neutral background.
- Image files must be in .jpg, .gif, or .tiff format (at a resolution of at least 300 dpi).
- The image must be at least 500 pixels wide and less than 3mb in file size.
- If you need a professional photo taken, please contact your affiliated hospital's Marketing Department and they can arrange for your photo.

Once you have ensured your photo meets the above criteria, share it with the Digital Team using one of these methods:

- Attach your photo file to an email to **info@rwjbh.org**.
- Upload your photo file to **rwjbh.org/docupdates**.
  - Please see image below for guidance on how to complete **Image Upload**.

Click here for a job aid on sharing your new provider photo with the Digital Team.

Inpatient Providers:

Reminder: Accurate Provider Care Team Information Is critical!

If you are part of a Provider Care Team, it's easy to sign yourself into a Team during Sign-In:

- When you log into Epic with your unique Username and Password, you will be prompted with a Sign-In pop-up to assign yourself to the Provider Team.
  - Verify the following information when you complete Sign-In:
    - Your Start and End time
    - Your Role
    - Your service
    - Your Contact Info
  - Select your **Provider Team(s)**

- This allows you to select Your Patients.
- You can also click **Select All**.

Adding a Patient to the Provider Care Team:

- Go to Patient Lists.
- Search for and highlight the patient on the Patient List.
- Right-click on the patient and select **Treatment Team** from the menu.

- Search for and select the Provider Care Team or select Add Team and select the Provider Care Team from the list.
- Click **Accept**.

Updating Attending Provider for Multiple Patients:

- Go to Patient Lists.
- Hold the **Shift** *or* **Ctrl** key on your keyboard and highlight multiple patients on the Patient List.
- Right-click and select **Assign Others** from the menu.

- Search for and select the Provider Care Team or select Add Team and select the Provider Care Team from the list.
- Click **Accept**.

- [Click here to review the associated Provider Care Teams Tip Sheet.](#)
- We are providing the definitions below to further explain Epic Terms related to finding patients.

Treatment Team: All inpatient clinicians currently assigned to the patient. Example: attending provider, consulting provider, RN, case manager

Practice Group: A group of providers that work for the same clinic or group. Provider group lists contain all patients that have one of these providers on their Treatment Team.

Provider Care Team: A group of providers that are sharing a panel of admitted patients. The Provider "Care" Team list contains all patients that are assigned to the Provider "Care" Team.

Patient Care Team: Cross encounter ambulatory providers. Example: PCP, cardiologist

Ambulatory Providers:

Auto Refresh of SmartLinks in Notes

A recent Epic Enhancement makes note writing more efficient!

- Epic allows outpatient providers to set their progress notes to auto-refresh any SmartLinks when a note is signed.
  - **The auto-refresh functionality, activated in October of 2023, will save you clicks!**
- The checkbox defaults to "Off." However, you can click **AutoRefresh** in My

Note to take advantage of this efficiency trick!

- When you turn AutoRefresh on, it remains on for future encounters.

Pre-Charting Can Save You Time!

Pre-Charting on a patient visit is possible without starting the Visit.

- Recently, there has been an increased focus on *Open Encounters* in Epic.
- Many times, the open encounters exist because a staff member starts the visit, converting the visit to an encounter before the patient arrives, causing issues closing the encounter if the patient does not show.
- **IMPORTANT: PLEASE DO NOT START THE VISIT (converting the visit to an encounter) UNTIL THE PATIENT IS PHYSICALLY PRESENT/ARRIVED.**
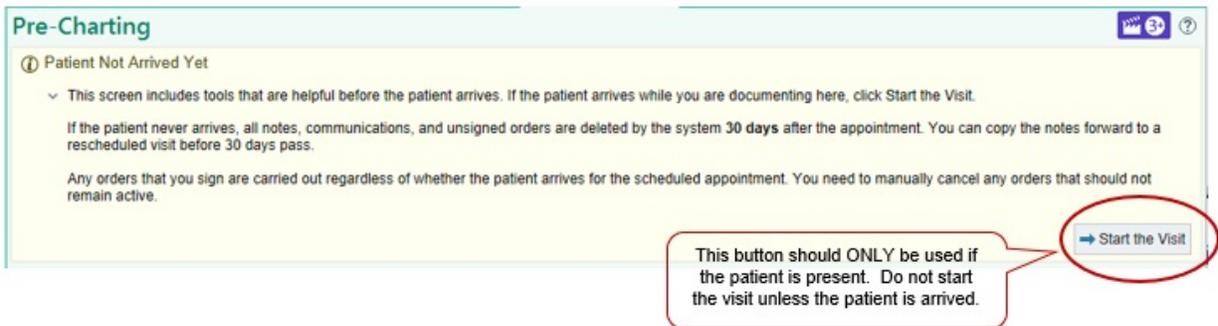
What is Pre-Charting?

Pre-Charting is a way for a clinician to review a patient's chart and take the following steps to save time and prepare for a patient visit:

- Enter visit diagnoses
- Write notes
- Write patient instructions
- Place orders (It is recommended you **do not Sign** the orders.
  - Epic will delete any unsigned order in 30 days if the patient does not arrive for the visit.
  - Any orders that are signed prior to the patient arriving at the office

are valid, active, actionable orders.

- If the patient does not show for the visit, orders **signed** in pre-charting will need to be manually canceled, if not appropriate.

If the patient never arrives, all notes, communications, and **unsigned** orders are deleted by Epic **30 days** after the appointment date. Notes can be copied forward to a rescheduled visit before 30 days pass.

If the patient arrives while a clinician is Pre-Charting, the clinician can select the option to "Start the Visit." **THIS IS THE ONLY TIME the START THE VISIT button SHOULD BE USED**.

Managing Erroneous Encounters

- If an encounter is opened, and the patient does not arrive for their appointment, follow the workflow to make that encounter erroneous.
- See tip sheet found for **Erroneous Encounters** to complete and close the encounter.

Good Humor

Epic: How to Get Help

Review the Epic How to Get Help Flyer!

- The "Epic How to Get Help" Flyer includes instructions to:
  - Open a Help Desk Ticket
  - Check The Status of an Open Ticket
  - Reopen a closed ticket
  - Enter an Epic Enhancement Request
- Click here to view the Epic: How to Get Help flyer!

Live Site Epic Provider Print Edition!

- Click here for a printable PDF of this week's Live Site Epic

Phone a friend:
Our cell numbers are available below.
Please call with any questions or concerns.

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