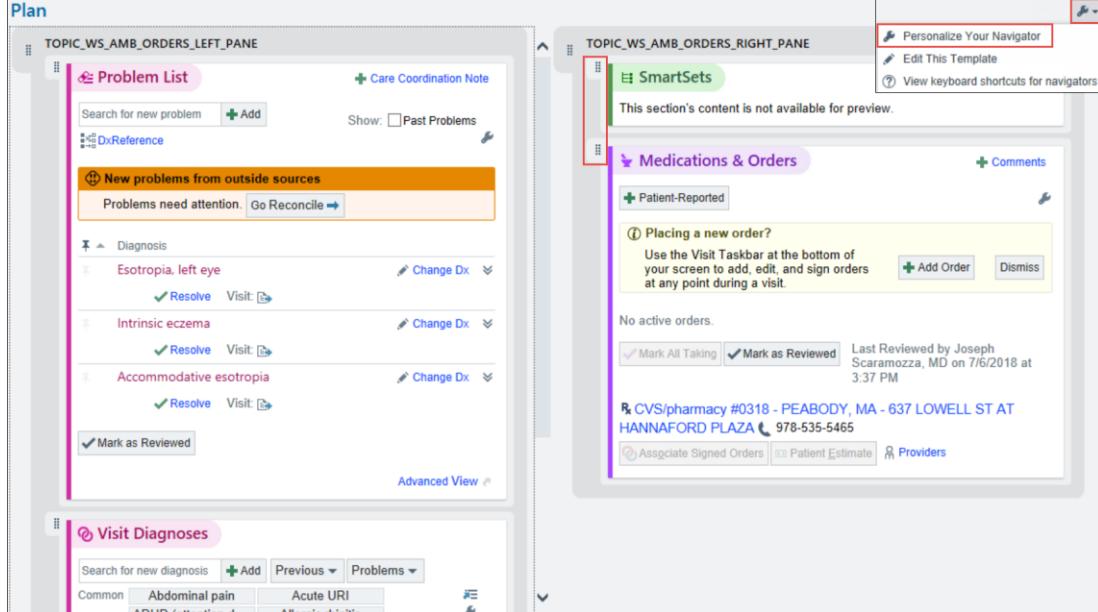




Epic Version February 2018: EpicCare: User Guide

Learning Legend:



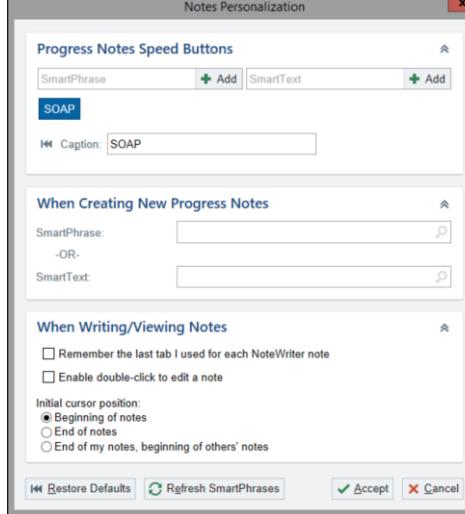
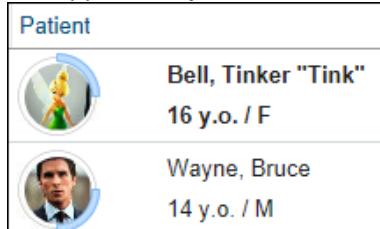
Topic:	Learning Category:	What's Different as of August 14, 2019?
Personalization & Navigation	New Feature	<ul style="list-style-type: none">Rearrange sections within your Navigator. Previously you could only personalize the sections within the current topic. Now, you can rearrange all sections within a certain activity (Plan activity > Wrench > Personalize your Navigator > Drag and Drop the sections where you want). 

Continued on next page.

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		<ul style="list-style-type: none">- A new look for Notes personalization settings (Notes > Wrench). - Link to the Mass.gov site to report Child Abuse or Neglect has been added to the References option from the Hyperspace toolbar (References > Support Tools > DCF Reporting). 
Multi Provider Schedule (MPS)	New Look	<ul style="list-style-type: none">- Patient photo will always appear on the schedule, regardless of how many patients are booked. They will still not appear if Open Slots has been enabled. 

Continued on next page.

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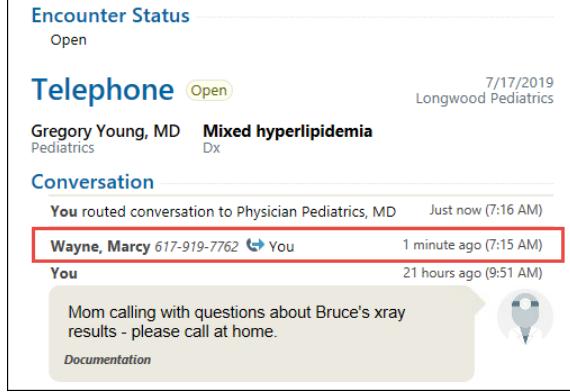
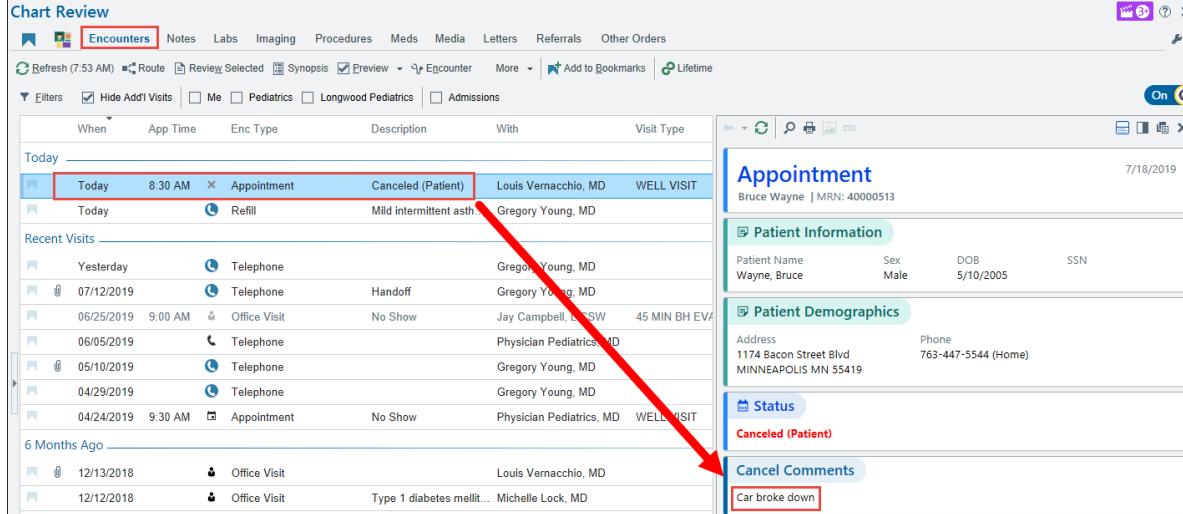
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Transforming Epic to a Dynamic, and Data Informed Enterprise

PPOC

Chart Review

- Contact information entered in Telephone Encounters is now visible in the preview report within Chart Review.

- Cancelled appointments will show the **Cancellation Comment** in the report (Chart Review > Encounter tab > Single-click appointment > Cancel Comments).

- Future appointments will show the **Appointment Notes** in the report (Chart Review > Encounter tab > Single-click appointment > Encounter Information).

Continued on next page.

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Chart Review

Encounters Notes Labs Imaging Procedures Meds Media Letters Referrals Other Orders

Appointment

Patient Information

Patient Demographics

Encounter Information

File Attached To

Document Information

Comments (2500 characters max): Comments added when uploading/scanning to Media Manager

- Comments added during the uploading of a document to Media Manager will now appear in the **Media** tab in **Chart Review** (Chart Review > Media > Single-click on document).



Chart Review

Encounters Notes Labs Imaging Procedures Meds **Media** Letters Referrals Other Orders

Refresh (9:21 AM) Route Review Selected Synopsis Preview Thumbnail View View/Play More Add to Bookmarks Media Manager

Filters Default filter DNR Advance Directive Patient Level Encounter Level Order Level

Date/Time	Document Type	Description	Enc Date	File Attached to
2 Years Ago				
07/12/2017 3:29 PM	Other	6/7/17-SPOT VISION SCRE...	Patient	
05/20/2017 8:45 AM	Physician Office Fi...		Patient	
05/20/2017 8:45 AM	Physician Office C...		Patient	

Comments
Comments added when uploading/scanning to Media Manager

- Review the patient's **Lifetime** of care at a glance from the **Encounters** tab within **Chart Review**.

Chart Review

Encounters Notes Labs Imaging Procedures Meds Media Letters Referrals Other Orders **Lifetime**

Refresh (10:40 AM) Route Review Selected Synopsis Preview Encounter More Add to Bookmarks Lifetime

Filters Hide Add'l Visits Pediatrics Pediatric Health Care Admissions

Lifetime

2017 Apr Jul Oct 2018 Jan Apr Jul Oct 2019 Jan Apr Jul

Events

Problems

- Accommodative esotropia
- Esotropia, left eye
- Intrinsic eczema
- Molluscum contagiosum

History

Medications

Penicillins (1)

- Drag and drop sections of the **SnapShot Reports** within **Chart Review** (Chart Review > Select the report > Wrench > Personalize the report).

Chart Review

Encounters Notes Labs Imaging Procedures Meds Media Letters Referrals Other Orders

Peds SnapShot

Problem List Specialty Comments

Add or remove buttons from toolbar Personalize this report

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Transforming Epic to a Dynamic, and Data Informed Enterprise

PPOC

In Basket

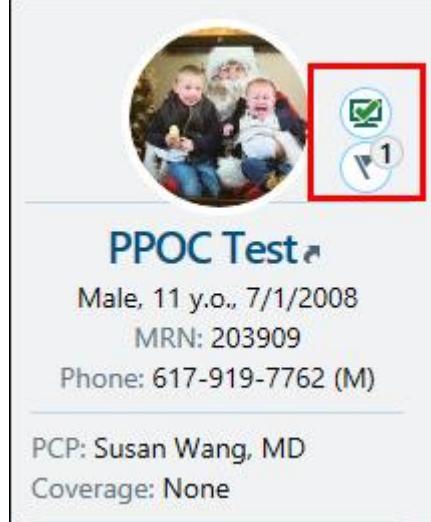
Telephone & Medication Encounters

New Look

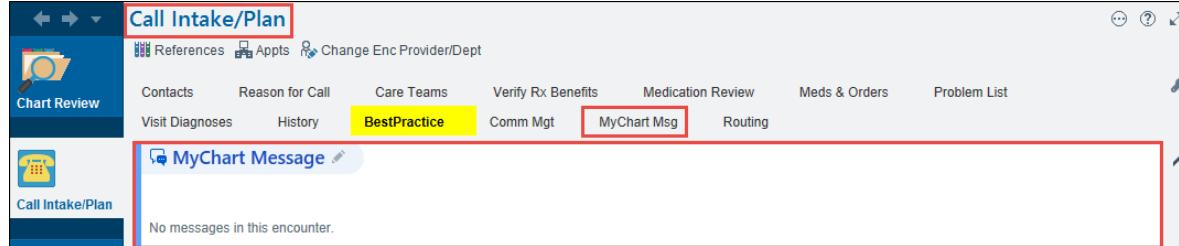
- Columns for Medication messages have been updated with more information and consistency.

Home : Steven Mendes, MD's In Basket > Rx Request 1 unread, 1 total					Sort & Filter
Req Date	Patient	Medication	Protocol	Rx Source	
7/3/2019 1:43 AM		LORATADINE CHILDRENS 5 MG/5ML syrup [Pharma... None			
Pharmacy: CVS/pharmacy #1247 - EAST WAREHAM, MA- 2992 CR...		Provider: Steven Mendes, MD		Pharmacy	
Encounter O...: Open		Sender: Shelby Fernandes, LPN	Pool?: NO	Controlled?:	Last Accessed:

- Notification Icons available within sidebar reports.



- Ability to send patient a MyChart message directly from within a Telephone Encounter if the patient is active on MyChart.



Continued on next page.

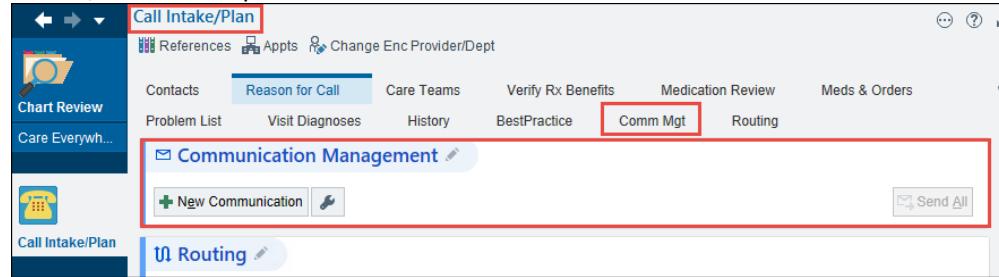
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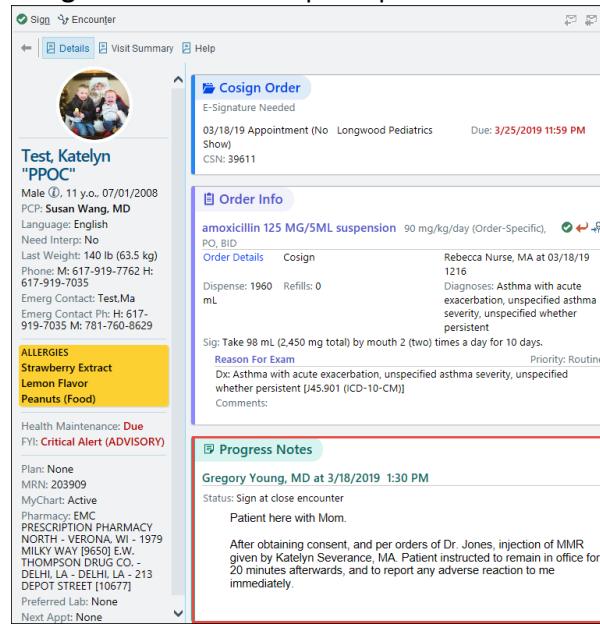


Transforming Epic to a Dynamic, and Data Informed Enterprise

- The **Communication Management** section (where letters are created) has been relocated to within the **Call Intake/Plan** of Telephone Encounters for all users.



- New options for **Reason for Call** when creating Telephone Encounters to include:
 - Discharge Follow-Up – ED
 - Discharge Follow-Up – Inpatient Admission
 - Discharge Follow-Up – Other
 - Certified Letter
- **Cosign – Clinic Orders** report updated to include the associated Progress Note.



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Transforming with Epic to a Dynamic, and Data Informed Enterprise

PPOC

		<ul style="list-style-type: none">- Option to Postpone messages in the Overdue Results folder.
Letters	Workflow Change	<ul style="list-style-type: none">- Provider Signatures: will now appear on all letters with the exception of the Health Form as long as we have received the signature from the provider.- The signature will only appear for the provider who the encounter is created with. If a clinical staff member creates an encounter under themselves and needs to create a letter with the providers signature on file, they will need to change the encounter provider by clicking Change Enc Provider/Dept prior to creating the letter.

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Transforming with Epic to a Dynamic, and Data Informed Enterprise

Screenings

- Wording change to address **the patient** in the TB Questionnaire and updated question about **Travel** from 2 weeks to 1 month.

Was the patient born outside the United States?	<input type="button" value="Yes"/> <input type="button" value="No"/>
Was the patient born in Africa, Asia and Pacific Islands (except Japan), Central America, South America, Mexico, Eastern Europe, the Caribbean or the Middle East?	<input type="button" value="Yes"/> <input type="button" value="No"/>
In the past year...	
Has the patient lived in or traveled to Africa, Asia and Pacific Islands (except Japan), Central America, South America, Mexico, Eastern Europe, the Caribbean or the Middle East?	<input type="button" value="Yes"/> <input type="button" value="No"/>
Was the duration of travel more than 1 month?	<input type="button" value="Yes"/> <input type="button" value="No"/>
Has the patient been exposed to anyone with a positive TB skin test?	<input type="button" value="Yes"/> <input type="button" value="No"/>
Was the contact sick from tuberculosis (cough, weight loss, night sweats)?	<input type="button" value="Yes"/> <input type="button" value="No"/>
Did the contact have additional testing for TB disease or treatment with medication to prevent getting sick from TB prior to exposure to the patient?	<input type="button" value="Yes"/> <input type="button" value="No"/>

- **SWYC** has been added to **Synopsis**:

Synopsis			
Peds General Summary	ADHD	Asthma	Concussion
Anemia/Lead	S2BI/CRAFFT	Anxiety/Depression	Thyroid
PSC17	SWYC/MCHAT		
Days	4/26/2018	7/20/2018	10/16/2018
All	1/15/2019		
▲ Patient Spotlight			
No data to display.			
▲ SWYC (Survey of Well-being of Young Children)			
<input type="checkbox"/> Development for 9,10,11 months. (Normal > 11,13,14) SCORE	16		
<input type="checkbox"/> Development for 12,13,14 months. (Normal > 12,13,14) SCORE		20	
<input type="checkbox"/> Development for 15,16,17 months. (Normal > 10,12,13) SCORE			18
<input type="checkbox"/> Developmental for 18,19,20,21,or 22 months. (Normal > 7,9,10,12,or 13) SCORE			18
<input type="checkbox"/> PPSC (normal < 9) SCORE			0
<input type="checkbox"/> Inflexibility score (normal < 3)	0	0	0
<input type="checkbox"/> Irritability Score (normal < 3)	0	0	0
<input type="checkbox"/> Routine difficulty Score (normal < 3)	0	0	0
<input type="checkbox"/> SWYC POSI (Normal < 3) SCORE			0
▼ SWYC (Family Screens)			
▲ MCHAT Score			
No data to display.			
▼ MCHAT Questions			

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Transforming with Epic to a Dynamic, and Data Informed Enterprise

Documentation

Workflow Change

- **Phonetic Name** now available within **Clinical Demographics** screens (Demographics > Clinical Information tab > Phonetic Name).

The screenshot shows the 'Clinical Demographics' screen in the 'Clinical Information' tab. The 'Demographics' section is highlighted. In the 'Patient Lists' section, the 'Phonetic Name' field is highlighted with a red box. Other fields shown include Primary Location (LONGWOOD PEDIATRICS, LLP), Provider (VERNACCHIO, LOUIS [1000020]), PCP type (General), and various checkboxes for EpicCare Patient, Restricted access, and Chart abstracted. Below these are sections for Pharmacy Preferences (CVS PHARMACY # 1071 - BROOKLINE, MA - 400 WASHINGTON ST), Lab Preferences, and a section for Code status, Date updated, and Comments. At the bottom, there are fields for Needs interpreter (No), Preferred language (English), Ethnicity, Written language (1 English), and a permanent comments section.

- **Patient Instructions** can now be added during **Pre-Charting** and will no longer convert the encounter if the patient were to No Show.
- **Patient Instructions for Croup** have been added to the **Viral Respiratory Infection SmartSet**:

The screenshot shows the 'Patient Instructions' section of a SmartSet. The 'Croup' section is highlighted with a red box. It contains a list of checkboxes for various pediatric respiratory conditions in English and Spanish, including URI, Bronchiolitis, Bronchitis, Conjunctivitis, Cough, and Croup. The 'Croup' section is specifically highlighted.

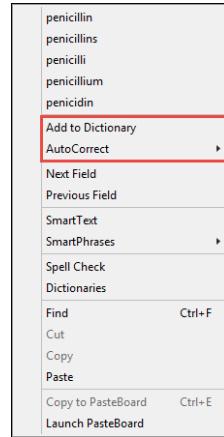
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- **Custom User Dictionaries:** ability to right-click on a misspelled word and use auto-correct or set ignored words, etc.



- **SOAP note formatting changes in version 2:**
 - **Tables** removed
 - **Titles** updated to full name and blue font
 - All changes can be seen in the **SOAP Note Version 2** video on Learning@PPOC (<https://ppoc.csod.com>)

Chief Complaint
Well Visit

History of Present Illness
Susan Richards is a 6mo female who presents to the office with her parents.

Review of Systems
Negative except as in HPI.

Development
Social:
looks at self in mirror
Language:
responds to name
Cognitive:
brings things to mouth
Movement:
rolls both ways.

Anticipatory Guidance
ANTICIPATORY GUIDANCE - Discussed: family functioning, infant development, nutrition and feeding, oral health and safety



Transforming with Epic to a Dynamic, and Data Informed Enterprise

- **History** activity updated headers: **General, Health Supervision, and Specialty**.
- **Substance Use History** renamed and reformatted to **Substances & Gender Identity** and includes the Screening to Brief Intervention (S2BI) and Sexual Orientation and Gender Identity (SOGI) forms.
 - All changes can be seen in the **Adolescent Substance Use and SOGI Form** video on Learning@PPOC (<https://ppoc.csod.com>).



Substances & Gender Identity

Substance Use: Screening to Brief Intervention (S2BI)
(© Boston Children's Hospital 2014)

Previous Substance Use History

In the past year, how many times have you used:

.	All Never			
Tobacco (smoked, chewed)?	1. Never	2. Once or twice	3. Monthly	4. Weekly or more
Vaping products (eCig, Juul, Hookah)	Previous value:	No previously filed data		
Alcohol?	1. Never	2. Once or twice	3. Monthly	4. Weekly or more
Marijuana (smoked, vaped,edible)?	Previous value:	No previously filed data		
Other Drugs	1. Never	2. Once or twice	3. Monthly	4. Weekly or more

Substance Use Comments

Choose Gender Identity: Female Cisgender (autofill) Male Cisgender (autofill) Other (open details of G)

Gender Identity Details

Restore Close Previous

- **Gender Identity** information will replace patient sex on the patient header, is denoted with the icon below and will flow into demographics.



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		<ul style="list-style-type: none">- Change in printing default for the After Visit Summary (AVS):<ul style="list-style-type: none">- Patients under 13 years of age = AVS with Medications- Patients over 13 years of age = AVS without Medications- Ability to choose what you want to print is still available. The report selected to print, will also appear in MyChart. If nothing is printed, the AVS without Medications will be available on MyChart. As a reminder, proxies of patients over 13 years of age do not have access to the AVS on MyChart.																																								
Health Maintenance	New Look	<ul style="list-style-type: none">- In the Frequency column, for immunizations with clinical decision support information, the link to the detail report is now labeled Imm Details instead of Sequential.- Topics that are Completed, Addressed, Aged Out, or Discontinued are now grouped into a section titled Completed or No Longer Recommended instead of Inactive, to reflect that they might have been addressed in the past. <div style="border: 1px solid black; padding: 5px;"><p>Health Maintenance</p><p>Update HM Edit Modifiers Postpone Remove Postpone Override Remove Override Document Past Immunization Discontinue Edit Frequency</p><table border="1"><thead><tr><th>Topic</th><th>Due Date</th><th>Frequency</th><th>Date Completed</th></tr></thead><tbody><tr><td>Current Care Gaps</td><td></td><td></td><td></td></tr><tr><td>Hepatitis A Vaccines (2 of 2 - 2-dose series)</td><td>Overdue since 3/14/2008</td><td>Imm Details</td><td>9/14/2007 3/21/2007</td></tr><tr><td>Upcoming</td><td></td><td></td><td></td></tr><tr><td>Influenza Vaccine (1)</td><td>Next due on 9/1/2019</td><td>Imm Details</td><td>10/16/2013 1/25/2011 12/28/2010</td></tr><tr><td>Meningococcal Vaccine (2 - 2-dose series)</td><td>Next due on 3/19/2020</td><td>Imm Details</td><td>5/27/2015</td></tr><tr><td>DTaP, Tdap, and Td Vaccines (7 - Td)</td><td>Next due on 5/27/2025</td><td>Imm Details</td><td>5/27/2015 3/21/2008 6/23/2005</td></tr><tr><td>Completed or No Longer Recommended</td><td></td><td></td><td></td></tr><tr><td>Hepatitis B Vaccines</td><td>Completed</td><td>Imm Details</td><td>12/20/2004 5/24/2004 3/19/2004</td></tr><tr><td>Pneumococcal Vaccine</td><td>Completed</td><td>Imm Details</td><td>6/23/2005 9/22/2004 7/21/2004</td></tr></tbody></table></div> <ul style="list-style-type: none">- HPV: a 3-dose regimen for HPV will be recommended in Health Maintenance for males over 21 years of age who have not been vaccinated for HPV and are identified as having same sex partners.	Topic	Due Date	Frequency	Date Completed	Current Care Gaps				Hepatitis A Vaccines (2 of 2 - 2-dose series)	Overdue since 3/14/2008	Imm Details	9/14/2007 3/21/2007	Upcoming				Influenza Vaccine (1)	Next due on 9/1/2019	Imm Details	10/16/2013 1/25/2011 12/28/2010	Meningococcal Vaccine (2 - 2-dose series)	Next due on 3/19/2020	Imm Details	5/27/2015	DTaP, Tdap, and Td Vaccines (7 - Td)	Next due on 5/27/2025	Imm Details	5/27/2015 3/21/2008 6/23/2005	Completed or No Longer Recommended				Hepatitis B Vaccines	Completed	Imm Details	12/20/2004 5/24/2004 3/19/2004	Pneumococcal Vaccine	Completed	Imm Details	6/23/2005 9/22/2004 7/21/2004
Topic	Due Date	Frequency	Date Completed																																							
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Hepatitis A Vaccines (2 of 2 - 2-dose series)	Overdue since 3/14/2008	Imm Details	9/14/2007 3/21/2007																																							
Upcoming																																										
Influenza Vaccine (1)	Next due on 9/1/2019	Imm Details	10/16/2013 1/25/2011 12/28/2010																																							
Meningococcal Vaccine (2 - 2-dose series)	Next due on 3/19/2020	Imm Details	5/27/2015																																							
DTaP, Tdap, and Td Vaccines (7 - Td)	Next due on 5/27/2025	Imm Details	5/27/2015 3/21/2008 6/23/2005																																							
Completed or No Longer Recommended																																										
Hepatitis B Vaccines	Completed	Imm Details	12/20/2004 5/24/2004 3/19/2004																																							
Pneumococcal Vaccine	Completed	Imm Details	6/23/2005 9/22/2004 7/21/2004																																							
Best Practice Advisory (BPA)	Workflow Change	<ul style="list-style-type: none">- Chlamydia BPA refined to only fire for women who have been marked as sexually active who have not had a screening within 350 days. Also new button available if patient had been screened elsewhere within the year.- Screening BPAs: The alerts that fire when an abnormal screen is documented have been changed to suggestions and do not require an acknowledgement. The alert will only fire within the encounter in which the screen was documented.- Tufts ACO patients with a positive screen for depression will continue to receive the BPA asking if follow up actions had been taken; however, it has been reformatted and grammatically corrected.																																								



Orders & Results	New Look	<ul style="list-style-type: none">- Immunizations will automatically associate to a diagnosis in the Router upon signing the visit. They will also now appear under the heading Other orders in the SOAP note. - Default dosing of short acting stimulants to once a day in the ADHD SmartSet have been updated based on review of prescribing practices at the PPOC.- Quickly select an entire order group when releasing orders in Order Review by clicking the header.

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Transforming Epic to a Dynamic, and Data Informed Enterprise

- Added **Frequency of Every Afternoon** to list of options when prescribing medications.

Product: AMPHETAMINE-DEXTROAMPHETAMINE 5 MG PO TABS
Sig Method: Specify Dose, Route, Frequency Use Free Text Taper/Ramp Combination Dosage
Dose: 1 tablet 5 mg 10 mg 15 mg
Prescribed Dose: 5 mg
Prescribed Amount: 1 tablet
Route: Oral Oral
Frequency: Every afternoon Daily BID TID
Duration: 30 Doses Days 30 days
Starting: 7/18/2019 Ending: 8/17/2019 First Fill: _____
Dispense: Days/Fill: Full (30 Days) 30 Days 90 Days
Quantity: 30 tablet Refill: 0 0
Total Supply: 30 Days
 Dispense As Written
Mark long-term: AMPHETAMINE-DEXTROAMPHETAMINE

- Updated layout for **Medication Dispensing** information within the Order Composer to group Duration and Dispense together.

Product: AMOXICILLIN 250 MG/5ML suspension
Sig Method: Specify Dose, Route, Frequency Use Free Text Taper/Ramp Combination Dosage
Dose: 90 mg/kg/day 250 mg 45 mg/kg/day 90 mg/kg/day
Weight Type: Recorded Ideal Adjusted Dosing Order-Specific
Weight: 23.6 kg
Recorded weight: 23.6 kg (recorded in the last hour)
Prescribed Dose: 1,050 mg
Prescribed Amount: 21 mL
Route: Oral Oral
Frequency: 2 times daily BID TID
Duration: 10 Doses Days 7 days 10 days 14 days 21 days 30 days
Starting: 7/17/2019 Ending: 7/27/2019
Dispense: Days/Fill: Full (10 Days) 30 Days 90 Days
Quantity: 420 mL Refill: 0 0
Total Supply: 10 Days
 Dispense As Written
Mark long-term: AMOXICILLIN

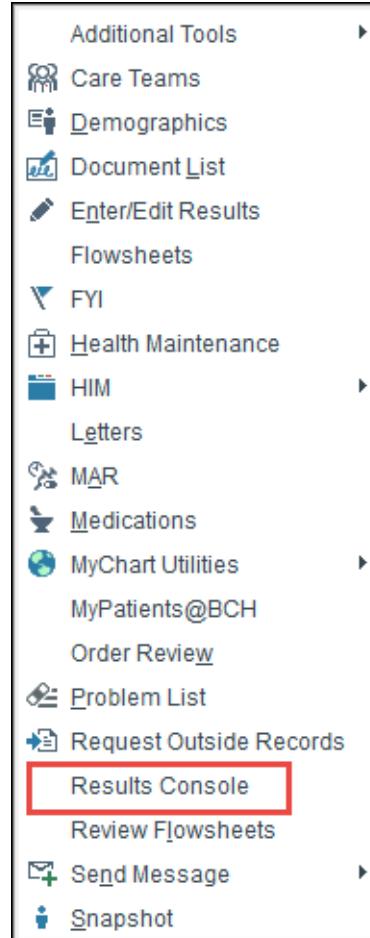
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- **Historical Results** entered through the **Results Console** will no longer be routed to the Authorizing Provider, but file directly to the patients chart
- The **Results Console** has been added to the **More** activity in Office Visit encounters. You can now quickly add historical results from within a scheduled visit by launching the **Results Console**.





MyChart

New Feature

- Patients can opt into **Two Factor Authentication** for MyChart login (Profile > Security Settings).

Security Settings

Change Password

Your password must be different than your MyChart Username. For increased security, use a combination of numbers and letters (lowercase and uppercase).

Current Password:

New Password:

Confirm New:

SAVE PASSWORD

Two-Step Verification Settings

Two-step verification is an additional level of security to help keep your account secure—even if someone has your password.

TURN ON TWO-STEP VERIFICATION

- **Clinical Updates** added by a patient or proxy on MyChart will now be routed to the **Pt Clinical Update** folder of the **PCP** listed in the patient's chart. These can be filed to the chart directly or from the In Basket message by clicking the **Reconcile Clinical Update Requests** button in the toolbar.

Reconcile Clinical Update Requests

Patient Review of Clinical Information

Problems

This clinical information was not verified, but there are updates pending review:

Reported Problems	Start Date	Reported By	Reporter Comments
Itch of eye		Tink Bell	testing update clinical folder for TINKERBELL - to Louis Vernachio
Juvenile myoclonic epilepsy	6/5/2019	Tink Bell	please add this to my history

Medications

This clinical information was not verified, but there are updates pending review:

Reported Medications	Start Date	Reported By	Reporter Comments
predniSONE 1 MG tablet delayed-release		Tink Bell	

Allergies

This clinical information was not verified, but there are updates pending review:

Reported Allergies	Start Date	Reactions	Reported By	Reporter Comments
Food		Hives, Rash	Tink Bell	lobster