

EPIC TRAINING



Employee Health Quick Start Guide

HOUSTON
Methodist[®]
LEADING MEDICINE



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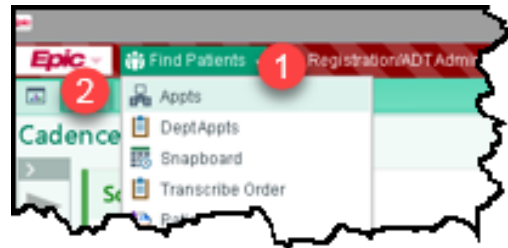


Employee Health: Schedule and Register Appointments Using One Click

Scheduling

Creating the Appointment

1. Click **Find Patients** on the **Hyperspace Toolbar**
2. Click **Appts**
3. On the **Patient Lookup** window, enter patient information
 - a. **Patient Name** or **MRN**
 - b. Patient's **SSN** or the last 4 digits with an *
 - c. Patient's **Sex**
 - d. Patient's **Birth Date**
 - e. Click **Find Patient**; or
 - f. For a new patient, click **New**



Patient Lookup

Select Patient **Patient Search** Recent Patients Family/Group Temporary Groups

Name/MRN: **a** TEST, EMPLOYEE HEALTHPATIENT EPI ID:

SSN: **b** 999999999 Sex: **c** Male [2]

Birth date: **d** 2/10/1977 Transplant Pt:

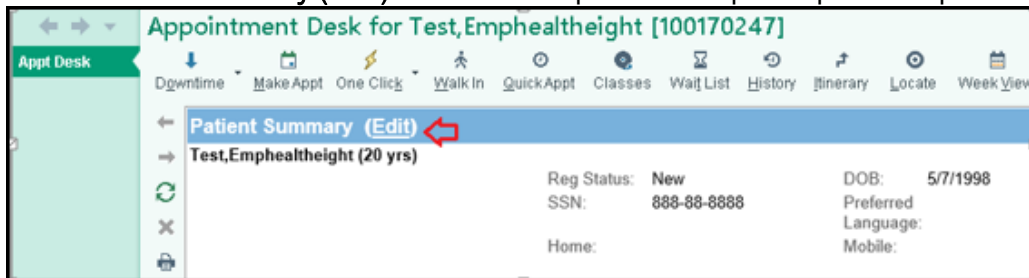
Phone # Zip Code

Alt Phone # Department

Use sounds-like

f New **e** Find Patient Clear Accept Cancel

4. Click **Patient Summary (Edit)** to enter new patient or update previous patient demographics.



5. Fill in or edit the required demographics data or verify existing patient demographics; then click **Accept**.
 - a. Address
 - b. Phone Numbers
 - c. Email

Demographics

HM Undo ECP Beg

Name: Emphealheight Test SSN: 888-88-8888

Sex: Female Birth date: 5/7/1998 Aliases: 1

1-PermanentAddress 2-TemporaryAddress 3-Confidential Address

Address: [Red circle 'a']

City (or ZIP):

State: ZIP:

County: Country: United States of America

Contact information:

Number Type	Number
1 Home Phone	[Red circle 'b']
2 Work Phone	
3 Mobile	

Email: none@none.com [Red circle 'c']

Needs interpreter? Pref language:

6. From the **Appointment Desk**, click the **One Click** button then select the appropriate **Visit Type** from the dropdown list.

Appointment Desk for Bologna, Julie

Make Appt One Click Walk In QuickAppt Wait List

Animal Handler

Annual Health Assessment

BBP (Blood Borne Pathogen)

HAZMAT (Hazardous Material Exposure)

Injury Follow Up (OJI Follow Up)

LBTI (Latent TB Infection)

New Hire (New Employee)

Non Occupational Visit

Nurse Visit (Employee Health)

OJI (On The Job Injury)

Switch current department

7. Select the correct appointment time from the **One Click** schedule display.

One Click

Appt Desk New Search Date: 4/16/2018 Appt notes:

One Click Animal Handler ()

Today, Monday April 16, 2018

HMH EMPLOYEE HEALTH in HMH EMPLOYEE HEALTH

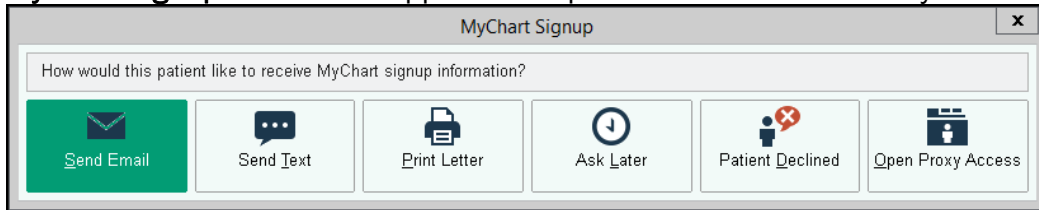
⚠ Patient already has an appointment scheduled on this day

2:00 PM 60 min	2:15 PM 60 min	2:30 PM 60 min	2:45 PM 60 min	3:00 PM 60 min	3:15 PM 60 min	3:30 PM 60 min	3:45 PM 60 min	4:00 PM 60 min	4:15 PM 60 min	4:30 PM 60 min	4:45 PM 60 min	5:00 PM 60 min
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8. Review the appointment details and click **Accept** to complete scheduling.



9. MyChart Signup window will appear if the patient does not have a MyChart account.



Registration

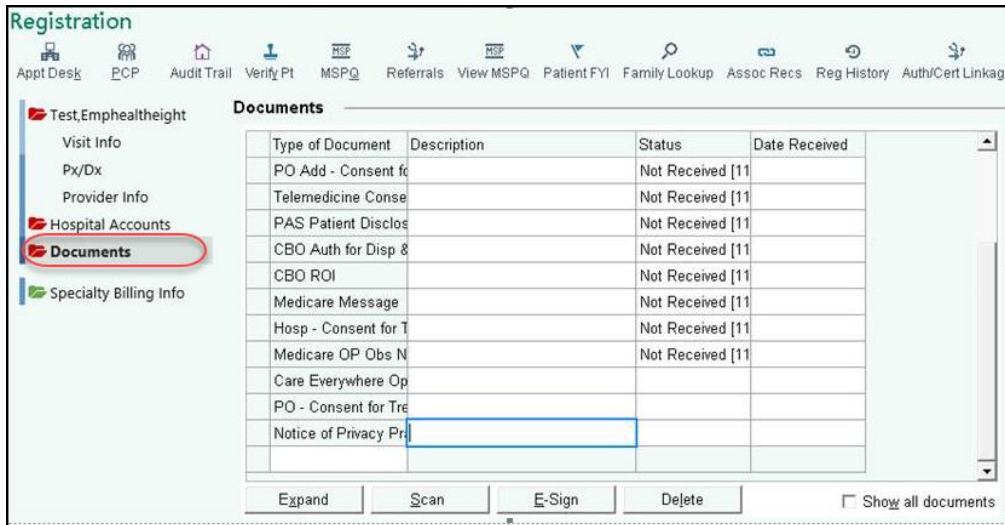
Registering the Appointment

1. Check In Registration Interactive Facesheet form





- Click the **Documents** folder to collect consent form and *Notice of Privacy* e-Signatures.



- Click the **Hospital Accounts** folder then select the **Add Guarantor** hyperlink.



- Verify the guarantor account type is listed as **Additional Type: Institutional**.
- Select **Other: Other** for **Who is responsible for this guarantor account?**

- In the **Guarantor Information** section, enter the correct account number in the **Name/ID** field. This number represents the department where you are scheduling and seeing the patient.

Note: Select the appropriate *Employee Health Clinic Institutional* account for the appropriate hospital.

- Click **Find Existing Account**

Account/Coverage Wizard

Account Questionnaire | **Add Guarantor Account Questionnaire**

Coverage Selection

What is the service area for this guarantor account? HOUSTON METHODIST SERV

What type of guarantor account would you like to add to this patient?
 Personal/Family Workers' Comp Third Party Add'l Type Institutional

Who is responsible for this guarantor account?
 Self Employer Spouse Father Mother Other Other

Guarantor Information

6 Name/ID: 668 SSN:

Sex: Birth date:

Home phone: Date of injury:

Employer:

Select a Patient Clear

Create New Account Find Existing Account 7

- Select the correct **Account ID** from the list of **Employee Health Clinic** accounts.

Guarantor Select

Given Criteria

Name: employee health DOB:

Sex: SSN:

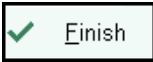
Type: Institutional Service Area: HOUSTON METHODIST SERVICE AREA

Wt	Account ID	Guarantor Name	SSN	DOB	Address	P
113	5004751	EMPLOYEE HEALTH CLINIC HMH, INSTITUTIONAL	xxx-xx-0000		ATTN: SUSANA BALDERAS, HOUSTON	E
113	4217709	EMPLOYEE HEALTH CLINIC HMSJ, INSTITUTIONAL	xxx-xx-0000	1/1/2000	Candice Parrack, BSN, RN, BAYTOWN	E
113	4476136	EMPLOYEE HEALTH CLINIC HMSL, INSTITUTIONAL	xxx-xx-0000	1/1/1900	ATTN: Jameka Means - Employee Health Clinic HM	E
113	4154334	EMPLOYEE HEALTH CLINIC HMSTJ, INSTITUTIONAL	xxx-xx-0000	1/1/1901	ATTN: KRISTY HANKS, HOUSTON	E
113	3623117	EMPLOYEE HEALTH CLINIC HMTW, INSTITUTIONAL	xxx-xx-0000	1/1/1900	17201 I-45 S, The Woodlands	E
113	4153965	EMPLOYEE HEALTH CLINIC HMW, INSTITUTIONAL		10/22/1973	ATTN: PAULA R SMITH, RN, HOUSTON	E
113	4476208	EMPLOYEE HEALTH CLINIC HMWB, INSTITUTIONAL	xxx-xx-0000		ATTN: KIMBERLY RUSHING, HOUSTON	E

Results loaded: 55

Expand Select Go Back



9. Click  on the Account/Coverage Wizard form:

Account/Coverage Wizard

Guar Acct Note Ent Guar Summ

- Account Questionnaire
- Guarantor Info**
- Coverage Selection

Guarantor Demographics

Service area: HOUSTON METHODIST SERVICE

Account type: Institutional Active?

Name: EMPLOYEE HEALTH CLINIC HM

Address link? No

Address: 17201 I-45 S
Attn: Employee Health

City (or ZIP): The Woodlands

State: TX ZIP: 77385

County: MONTGOMERY Country: US

Account status: 1 Active Staff [121]

Account contact: EMPLOYEE HEALTH CLINIC HM

Associated patient: EMPLOYEE HEALTH CL Select

Rel to patient: Other

SSN & type: 000-00-0000 Standard Unkn

Sex: U Birth date: 1/1/2000

Home phone: 936-494-5700

Work phone:

Fax:

Email:

Guarantor Employment

Employer: HOUSTON METHODIST HOSPITAL

Address:

City (or ZIP):

State: ZIP:

County: Country: US

Employment status: Full Time

Employment date:

Employee ID:

Occupation:

Phone: 713-790-3311

Fax:

Restore
Back Next

Finish

10. Click **Create New Account** to create the hospital account.

Check In

Appt Desk ECP Audit Trail MSPQ View MSPQ Patient FYI Referrals LCD/ABN Benefits Outside Records Act Maint Hosp Acct Note

Astrakhan,Julie Patient class: Guarantor acct type:

This Encounter

Patient Class: Outpatient Guarantor: INSTI Diagnosis: Unit/Dept: HEH Provider: Hmh Employee*

Select a hospital account for this encounter

Create New Hospital Account

Account ID - Guarantor	Relation to Patient	DOB	Address
510 - EMPLOYEE HEALTH CLINIC HMH,INSTITUTION*	Other		ATTN: SUSANA DELGADO

[Add Guarantor](#)

Hospital Account 4000018221

Account Overview

Name: TRAIN,EMPLOYEE HEALTH [4000018221] Hospital Account Status: OPEN
 Class: Outpatient Guarantor: EMPLOYEE HEALTH CLINIC H... Financial Class: Self-pay
 Guarantor Type: Institutional Service Area: HOUSTON METHODIST Location: HMH PARENT

[Create New Account](#)

11. Click the **Visit Info** folder and complete the **Accident related?** field.

Registration

Appt Desk ECP Audit Trail Verify Pt MSPQ Referrals View MSPQ Patient FYI Family Lookup Assoc Recs Reg History Auth/Cert Linkage Auth

Test,Emphealheight **Visit Info**

Guarantor Accounts

ID-Name	Type	Status	Rel to Pat	Balance
668-EMPLOYEE HEALTH CLINIC HMH,INSTITUTIONAL	INSTI		Other	558.00

Visit Coverages [Use Default Coverages](#) [Show Detail](#)

No active coverages on the selected visit guarantor

Visit claim:
 Private encounter?
 Expected acct type:

Accident related?
 Survey Opt Out?

12. Click on **Specialty Billing Info** form and enter the **Client billing** code for the correct entity.

Registration

Travel Screening Appt Desk ECP Audit Trail MSPQ Referrals View MSPQ Patient FYI Family Lookup View WQs Assoc Recs Reg History

Research Study

There are no active research study enrollments you are authorized to link to this encounter.

Specialty Billing Info

Client billing:
 Transplant review:



13. Select the correct Client Name.

Record Select

Search Recent

%	Client ID	Client Name	Billing Status	Client Type	Address
<input checked="" type="checkbox"/>	HMH000...	EMPLOYEE HEALTH CLINIC HMH	Active		ATTN: SUSANA BALDERAS 6565 FANNIN SM555
<input checked="" type="checkbox"/>	099997488	EMPLOYEE HEALTH CLINIC HMSJ	Active		Candice Parrack, BSN, RN Employee Health Clinic HMSJ 43
<input checked="" type="checkbox"/>	HMSL00...	EMPLOYEE HEALTH CLINIC HMSL	Active		ATTN: Jameka Means - Employee Health Clinic HMSL 16655
<input checked="" type="checkbox"/>	HMSTJ00...	EMPLOYEE HEALTH CLINIC HMSTJ	Active		ATTN:KRISTY HANKS 18300 ST JOHN DR
<input checked="" type="checkbox"/>	HMTW00...	EMPLOYEE HEALTH CLINIC HMTW	Active		ATTN: DEBBY HUGHES 17201 Interstate 45 South
<input checked="" type="checkbox"/>	099992018	EMPLOYEE HEALTH CLINIC HMW	Active		ATTN: PAULA R SMITH, RN 18500 KATY FREEWAY MWH
<input checked="" type="checkbox"/>	HMMWB00...	EMPLOYEE HEALTH CLINIC HMMWB	Active		ATTN: KIMBERLY RUSHING 18220 Tomball Pkwy

< ||| >

9 records total, all records loaded.

✓ Accept ✗ Cancel



Completing the Appointment



1. There are two **Accept** buttons.

- **Accept** (with the check mark): Completes the appointment without checking in patient.
- **Accept** (with the lightning bolt): Completes the appointment and automatically checks the patient in. The patient will then appear as arrived (AR*) on the **Appointment Desk**.

Encounter Date	Time	Appt	Visit Type	Provider	Department	Appt Notes	Or
5/10/2018 Thu	11:30 A(Ar*)	60	ANIMAL HANDLER	HMH EMPLOYEE HEALTH	HEH		



Employee Health: Placing Orders and Collecting Specimens

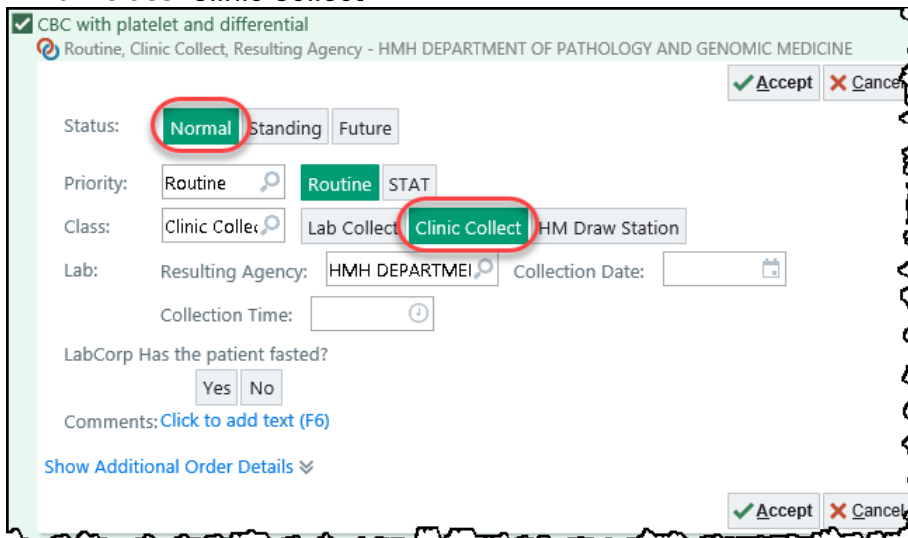
Orders

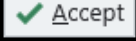
Placing the Order

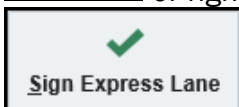
1. Double-click your patient from the **Schedule** workspace to open the appointment

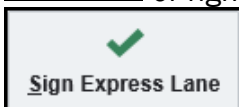


2. In the **Express Lane**, navigate to the **Employee Health SmartSet**. Expand the appropriate visit type and select orders that you wish to place
3. Click the blue summary sentence to modify details of the order, if necessary
4. Ensure that the following information is selected in the order composer
 - a. Status: **Normal**
 - b. Class: **Clinic Collect**



5. Click  or right-click anywhere in the order composer



6. Click  or press Alt + S on your keyboard



- 7. Select an Ordering provider
- 8. Click Accept

 Nearby' option, an 'Order mode' dropdown set to 'Per protocol: no cosign required', and an 'Ordering provider' dropdown menu. A red circle with the number '7' is placed over the 'Ordering provider' dropdown. The 'Authorizing Providers' section has a 'For procedures' dropdown menu with a red circle containing an 'i' icon. The 'Entry Information' section includes an 'Entered by' dropdown menu and a 'Comments' text area. At the bottom right, there are 'Accept' and 'Cancel' buttons. A red circle with the number '8' is placed over the 'Accept' button."/>

The screenshot shows the 'Providers' window with the following details:

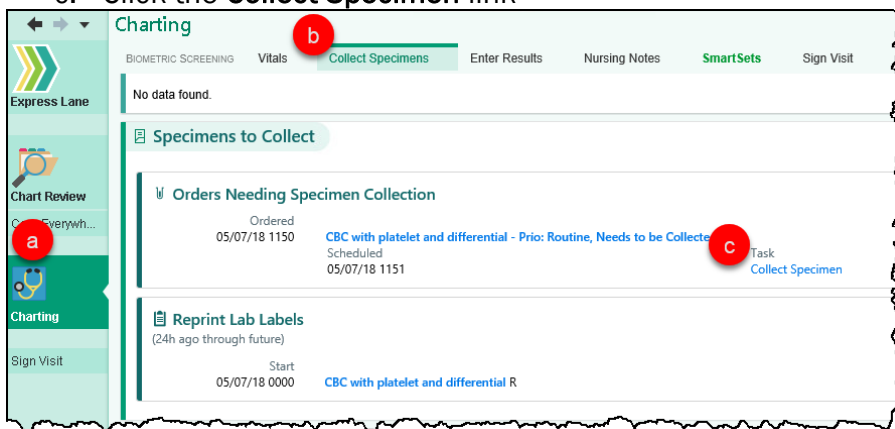
- Ordering Information:** Filter: Nearby; Order mode: Per protocol: no cosign required; Ordering provider: [Red circle 7]
- Authorizing Providers:** For procedures: [Red circle i]
- Entry Information:** Entered by: [Redacted]; Comments: [Empty text area]
- Buttons:** Accept (with red circle 8), Cancel



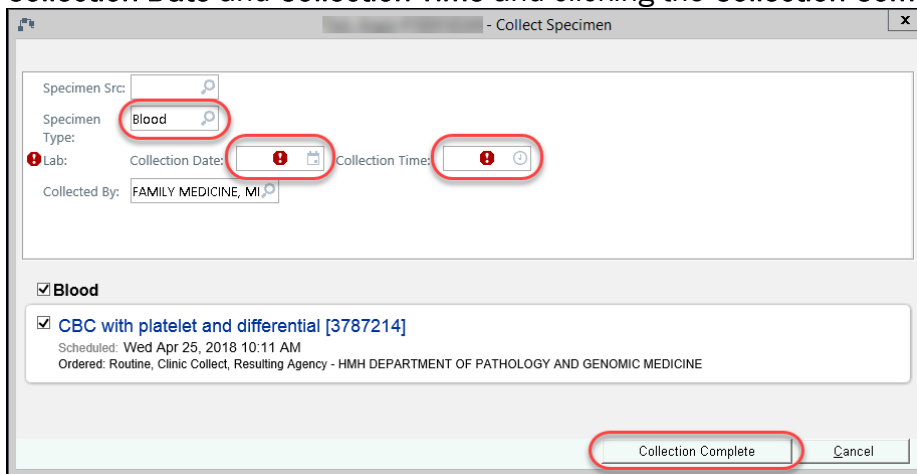
Specimens

Collecting the Specimen

1. After signing the **Express Lane**, a specimen collection task is automatically generated. To access it:
 - a. Click the **Charting** activity
 - b. Click the **Collect Specimens** section
 - c. Click the **Collect Specimen** link



2. Complete the **Collect Specimen** window by verifying that the **Specimen Type** is *Blood*, entering a **Collection Date** and **Collection Time** and clicking the **Collection Complete** button



3. After the **Collection Complete** button is selected, a patient label and order requisition prints and the information is electronically transmitted to designated laboratory services
4. Return to the patient's encounter and click Sign Visit