# Inpatient Med/PA/NP Student Epic Training Exercise Booklet

All exercises can be accomplished using the Playground Environment of Epic and the practice login provided by your Epic trainer or found on the Learning Dashboard (see exercise 6) use SVG MD Surgical Department if you are in WI, and SJS Medical Department if you are in IL

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### **Exercise 1: Find Patients**

As Medical students you will not have access to create a list of the patients you are following, however, you will be able to save your attending's list of patients and various unit lists as favorites to quickly find your patients.

- **1.** Save your Attending's list of patients as a favorite
  - From the patient lists screen open the **hospital folder** under available lists (SVG for WI, and SJS for IL)
  - Physician lists are organized alphabetically by last name, choose any physician from the list



- **Right click** on your chosen provider's name and select **Save as Favorite** 
  - Depending on your location this may not be your actual attending provider. They will also not have any patients in their list in the training environments due to HIPPA

concerns







Your provider's list is now saved as a favorite in your Favorite Lists folder

- **2.** Save the Emergency Department as a favorite as well
  - Open the Units folder for the hospital (SVG for WI and SJS for IL)
  - Right Click on Emergency Dept and select Save as Favorite

Your Favorite Lists folder now contains your attending's list of patients and the list of patients currently in the Emergency Dept.

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Click on the name of either list to see all the patients in that list.

- **3.** Searching for you patient's name is a quick way to find a new patient that may not be assigned to your attending's list yet
  - Search for your **Charlie** patient (last name provided with log in information) in the **Search all Admitted** field on the Patient lists screen

o Search by patients last name, first name

agast.	Hyperspace - SVG MD SURGICAL - ACE2 - HSHS Training ACE2
Epic 🚽 🏢 IRIS 🏠 Home 🛗 Schedule 🚦	E Patient Lists 🗐 In Basket 🐞 Patient Station 🎽 Chart 🏢 UpToDate 🤻 Remind Me 🛔 Neofax 🥥 Schedule 🍕 Encounter 🐛 Telephone Call 🖾 Send Letter 🔒 Appts 🔒 Secure 🏢 ePDMP-WI 🎬 ePDMR-L
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Patient Lists	
🌽 Edit List 🗸 👘 Open Chart 🛛 🖋 Sign In 🔌	Sign Out 🕴 Add Patient — Remove Patient 🔿 Wrap Text 🔋 Patient Report Properties 🔂 Print Handoff
My Lists	No List Selected Search All Admitted
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i Allen, Tracy L	Last Name, Charlie
Emergency Department	

• Double click on your patient's name to open their chart

## Exercise 2: Open and Search Patient's Chart

- 1. To open your patient's chart **double click** on your patient's name on the Patient Lists screen
- 2. Search the chart to see if Charlie has a history of diabetes:
  - To quickly search Charlie's chart type what information you are looking for in the search field of the storyboard on the left side of the chart.
- 3. From the storyboard find the following information about Charlie
  - What is Charlie's principal problem?
  - What was Charlie's last HGB level?
  - Does Charlie have any allergies on file?
  - Does Charlie have any PRN medications ordered?
  - *Hint:* hover over any area of the storyboard to get useful information and save time clicking through the chart
  - *Hint:* abnormal results are indicated by a red exclamation mark

The tabs on top of the screen organize the chart, use the **Summary**, **Chart Review** and **Results Review** tabs to answer the following questions:

- 1. What was Charlie's most recent temperature?
- 2. Does Charlie have any previous CT scans in our system?
- 3. Click on the encounter from yesterday, who performed the surgery/procedure?
- 4. Does Charlie have any abnormal results listed? What are they?

🔢 IRIS 🖃 In Basket

Charlie Vegetable Male, 60-year-old, 3/17/1961 MRN: 58662392 CSN: 126332557

Unit/Rm/Bed: SVG7MEDI-TRN RXIP RM 6 -NONE Cur Location: SJS 4 MEDICAL Code: FULL (no ACP docs) Adv Directives: None

Pt Class: Inpatient

EARLY WARNING SCORE

ADAUTTED. 2 (17/2021 (1 D

Diabetes

COVID-19

No assign Allergies:

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### Exercise 3: Write a Note

Use the **Notes** tab on the top of the screen to open the notes section of the chart. Within this activity you will find notes from the current admission and be able to write notes as well.

- Notes ← → Summary Chart Review Results Review Manage Orders Charges Notes 📩 <u>N</u>ew Note All Notes Progress Consults Nursing Notes Procedures H&P Discha Number of notes shown: 5 out of 5. All loaded. \* There are new updates. Sort b al ⊗ 🌮 Sort: Date Note Type Service More -🖋 Addendum Co H 🗐 🖚 Yesterday  $\approx$ Walt Ilwhitecoat, MD H&P Walt Ilwhite Date of Service: 03/17 0854 Physician Physician File Time: 03/17 1422 Emergency M... Emergency M Addendum
- 1. Write a progress note for Charlie
  - Click New Note
  - Enter the type of note: progress note, and the service you are working with
  - As a student you will be **required to have a co-signer** for all notes, enter Dr. Chris Vegetable (WI) or Dr. Chris Buttercrunch (IL) as your co-signer
  - search for Adult Daily Progress Note template
  - complete the note using the Subjective, Objective, and Assessment/Plan quick buttons on the top of the note
- My Note
   Tag
   Ishare w/ Patient
   Details 

   Type:
   Progress Notes
   Service:
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- When finished click **Sign**
- 2. Write another progress note for Charlie
  - Search for COPD template and select "Obstructive Lung Disease" template
  - Use the F2 key on the keyboard to fill in all the areas in brackets to complete the note

     Remember: "left click to pick, right click to stick"
  - When finished **sign** the note
    - your co-signer will receive a message that your note needs to be co-signed, for one of your notes to be considered billable your attending must add to, or addend, your note.

3. To practice writing other notes click Create in Notewriter

•

the chosen note, and click accept

• Click magnifying glass and select Medical Student Note

Notes				
t New Note t Create in NoteWriter ▼ Eilter ≔ Load All □ St	iow My Notes 🗌 Show Notes by 🖛 My Last Note 🤸 Mark All as Not New 📿			
All Notes Progress Consults Nursing Notes Proce	dures H&P Discharge Emergency Plan of Care Periop Event			
Number of notes shown: 6 out of 6. All loaded.	e are new updates. Sort by new notes			
Sort: Date Note Type Service   More -	Addendum 🖆 Copy 🗙 Delete 🖉 Sign = 🕻 Route 🕎 Flag For Chart Cor			
Today 🔗				
Neeshazero Cereal         Progress Notes           Medical Student         Date of Service: 03/24 1138           Hospitalist         File Time: 03/24 1144           Cosign Needed	Neeshazero Cereal         Progress Notes         Image: Second sec			
Yesterday 😞	fdsafbdsafdsafdsa			
Walt Ilwhitecoat, H&P Physician Date of Service: 03/23 0854 Emergency M File Time: 03/23 1422				
Jim Ilurgent, MD         ED Provider Notes           Physician         Date of Service: 03/23 0843           Emergency M         File Time: 03/23 0850	Select Note Type & Template Select a note type:			
Colon Iloscopy, Anesthesia Post-op Physician Date of Service: 03/23 0839 Gastroentero File Time: 03/23 0839	Note Type			
Deb ligurney, RN ED Triage Notes	Progress Notes			
Registered N Date of Service: 03/23 0837 Emergency M File Time: 03/23 1420	Pre-Sedation Assessment			
Colon lloscopy, Consults	Consults			
Physician Date of Service: 03/23 0801 Gastroentero File Time: 03/23 1448	Procedures			
	H&P			
	Discharge Final Progress Note			
	ED Notes			
	ED Provider Notes			
Medical Student Note The content of this medical student note is for e				



## Exercise 4: Admission Navigator

Use the **Admission Navigator** to admit, discharge, or enter orders for Charlie (click the **admission tab** on the top of the screen)



A navigator in Epic will walk you through necessary documentation for certain activities for your patient, such as admitting, discharging, etc.

• The column on the left side of the screen in a **table of contents** of the documentation, open each section by clicking on the name in the table of contents or the section header

\*\*\*As students we will have very abbreviated versions of these navigators and limited access in what we can document. Many sections will have a "read only" statement, we cannot document in those sections\*\*\*

Use the table of contents (left hand column) to work through the following activities/questions:

- 1. What are the 2 problems being addressed during this admission?
- 2. Does Charlie have any allergies?
- 3. Has Charlie had any surgeries in the past? If so, what procedure was performed?

4. Click manage orders in the table of contents to place, modify, and discontinue orders

Manage Orders					? ∠
Active Signed & Held Home Meds Cosign Or	der History				
View by: Therapeutic Class Go to: Expiring Medications	v				
Expiring Medications					
Dextrose-Sodium Chloride 5-0.9 % SOLN	100 mL/hr, Intravenous, at 100 mL/hr, Continuous, Starting Tue 3/23/21 at 0740, Until Thu 3/25/21 at	Reorder	Let Expire	Modify	Discontinue
	<ul> <li>Expires in 18 hours 58 minutes</li> </ul>				
pantoprazole (PROTONIX) 80 mg in sodium chloride	8 mg/hr (25 mL/hr), Intravenous, at 25 mL/hr, Continuous, Starting Tue 3/23/21 at 0840, Until Wed		Let Expire	Modify	Discontinue
0.9 % 250 mL infusion	<ul> <li>24/21 at 2100</li> <li>29 Expires in 8 hours 58 minutes</li> </ul>				
Cardiovascular Agents					
furosemide (LASIX) tablet 20 mg	20 mg, Oral, Daily, First dose on Tue 3/23/21 at 0915, Until Discontinued			Modify	Discontinue

- Change Charlie's Oxygen Therapy order from continuous to PRN
  - Click **Modify** next to the oxygen order
- Discontinue Charlie's **Zofran order** 
  - Click **Discontinue** next to Zofran order
- Enter in an order for Tylenol
  - Search for **Tylenol** in the search field on the top right
  - Choose a Tylenol option from the list, click **accept**
  - Click on the name of the order to adjust details
  - o Click sign
- Change the Lasix order from tablet to IV form
- 5. *Hint*: we cannot modify orders to change the route, the original order (tablet form) must be discontinued, and a new order, in IV form, must be entered
- When finished click **Pend-** the orders will be reviewed, changed as necessary, and signed by your attending provider

Click admission tab to continue through the admission navigator



6. **Medication reconciliation** is an important task when admitting, transferring, or discharging a patient. Click **Admission Medication Reconciliation** in the table of contents to open this 4 step process for Charlie's admission. (Students will only have access to pend these orders, the attending provider will review and sign the orders entered)



- Continue all of the current orders (click continue unselected)
   O Click let expire for both continuous orders
- Click **mark as reviewed** on the review home medications step
- Reconcile for home medications
  - Nothing to reconcile, continue to step 4
- New orders
  - Add any new order you would like
- Click **Pend** (bottom right of the screen)

## Exercise 6: Learning Dashboard

The Learning Dashboard is your Epic reference tool and is updated regularly

1. Open the **Learning Dashboard** (click the bar graph icon)- you may need to search for the learning physician dashboard, click the downward arrow next to the dashboard name and type learning in the search field, select learning physician



- 2. The right side of the learning dashboard in reserved for Inpatient Providers, there are some specialties listed below the **Specialty Supplements** section (OB/GYN, Psychiatric care, surgeon)
  - Open the Inpatient Handouts section (click the double grey arrows) and review the information on the 21<sup>st</sup> Century Cures Act.
    - Open the information by clicking on the carrot/arrow to the left of the title
    - Select any handouts that you would like to review
  - Upgrades happen typically every spring and every fall, any changes that will affect your role in Epic will be communicated through the purple **Inpatient Provider Upgrade** section.
    - <u>Please visit this area before a planned</u> <u>upgrade to learn about upcoming changes</u>.

#### Inpatient Handouts

#### > 21st Century Cures Act

- > COVID-19
- > General Information
- > Admission
   > BPAs
- > Charge Capture
- > Consult
- > Discharge

### Inpatient Provider Upgrade

Access to All Upgrade Companions and Changes Orders v.Feb2020 Epic Upgrade Companion Upgrade Handouts Admission, Transfer, Consult & Rounding Navigator Update Updates to blood ordering handout

- Find additional practice log in information in the **IP Provider Playground/Sandbox Practice Documents** section – be sure to select your appropriate role and state
- Epic E-learning videos are available under the **Training Quick** Links section
  - Scroll to the Inpatient section and view the EpicCare Inpatient Using the In-Basket video and other videos that you find helpful.

#### **Training Quick Links**

IT Training Survey Epic E-Learnings Epic Training Portal Instructions Epic Training Resource Guide