

# ED EPIC WORKFLOW

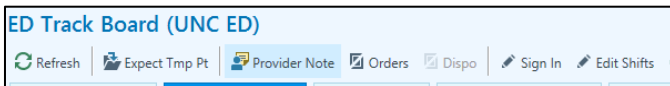
This document is not meant to be comprehensive. It's a broad strokes document to get you an overview of available Epic tools in the emergency department setting. Please ask your senior residents and attendings for their tips and tricks.

## Logging In – Signing In

1. When logging in, log into the appropriate EMERG department. Search EMERG and then choose the appropriate facility.

% ID	Department	Center	Specialty	Location	Service Area
10201323	EMERG DEPT CHT	CHATHAM REGION	Emergency Medicine	CHT	UNCHCS SERVI...
10112823	EMERG DEPT CLDH	MOUNTAINS CALDWELL REGION	Emergency Medicine	CLDH	UNCHCS SERVI...
10702953	EMERG DEPT HBR	TRIANGLE ORANGE COUNTY REGION	Emergency Medicine	HBR	UNCHCS SERVI...
10412933	EMERG DEPT JHCH	TRIANGLE JOHNSTON REGION	Emergency Medicine	JHCH	UNCHCS SERVI...
10413903	EMERG DEPT JHH	TRIANGLE JOHNSTON REGION	Emergency Medicine	JHH	UNCHCS SERVI...
10463290	EMERG DEPT NSHH	NASH REGION	Emergency Medicine	NSHH	UNCHCS SERVI...
10601283	EMERG DEPT OB REX	TRIANGLE REX HOSPITAL REGION	Emergency Medicine	Rex	UNCHCS SERVI...
10512943	EMERG DEPT PRDH	MOUNTAINS HENDERSONVILLE/ASHEVILLE REGION	Emergency Medicine	PRDH	UNCHCS SERVI...
10601283	EMERG DEPT REX	TRIANGLE REX HOSPITAL REGION	Emergency Medicine	Rex	UNCHCS SERVI...
10700110	EMERG DEPT UNCH	TRIANGLE ORANGE COUNTY REGION	Emergency Medicine	UNCH	UNCHCS SERVI...
10403900	EMERG DEPT VIRTUAL TRIAGE SVC				
10555630	EMERG DEPT WAYH	GOLDSBORO/KINSTON REGION	Emergency Medicine	WAYH	UNCHCS SERVI...
10700233	EMERG DEPT WBCAS UNC	TRIANGLE EAST WAKE REGION	Psychiatry	SBRK 107	UNCHCS SERVI...
10700110	UNCH EMERG DEPT VIRTUAL TRIAGE SVC	TRIANGLE ORANGE COUNTY REGION	Emergency Medicine	UNCH	UNCHCS SERVI...

2. Hyperspace will open to the ED Track Board. Click **Sign In** to sign into the EMERG Department. If you do not Sign In, you will not be able to assign yourself to patients.



**Sign In**

Provider: LARSON, JAMES LIONEL [1847]

Contact number: 919-928-4026  Pager

For non-numeric values, first enter a # symbol (e.g., #MyPhone).

Current role:  ED Provider  Attending Provider

or:

Assigned beds:

Shift:

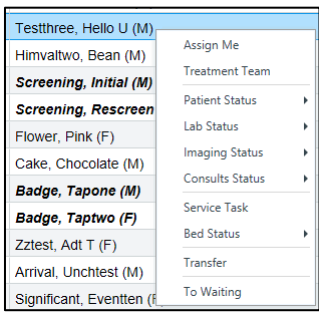
From: 1700 3/22/2020

To: 0200 3/23/2020

Length (hours): 8 9 10 12

Accept Cancel

3. To assign yourself to a patient, hover over the patient name on the Track Board, right-click and click on Assign Me. This will put your initials on the track board and route Hospital Chart Completion deficiencies to your In Basket. You will receive deficiencies for Clinical Impression, ED Provider note, ED Dispositio, and Send to Provider Billing. As you complete the documentation, the deficiencies will auto-retract.



4. Instead of using Patient List, the ED Providers use the Track Board to access patients. Track Board (TB) views filter patients. My Patients view will list patients you have assigned yourself to. All Patients view lists all patients arrived in the ED. Other TB views filter patients into Care Areas or patient types (To Be Admitted, etc.).

A. To understand the columns on the TB, hover over the column header and over icons to see descriptions. You can also find this information under Add'l Tools > Legend on the Toolbar. You will look for the RED patient status color to know which patients do not have a provider assigned to them.



. You can sort by any column by clicking on the header.

B. The Track Board toolbar allows you to jump into the patient chart to Notes, Orders, Dispo activities, place a Sticky note (visible to all ED users), etc. Highlight a patient on the TB, then click the activity button.

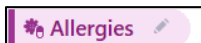
C. Highlighting a patient will populate TB reports in the bottom half of the screen. If you do not see reports, click the up-facing arrow in the bottom middle of the screen 'Show Report' – toggles to Hide Report.

5. You can double-click on a patient name, or use the toolbar buttons to open a patient chart.

6. Within the patient chart, you have activities for Chart Review (default), Results Review, Triage, Workup, Provider Note, Orders, Screening Tools and Dispo.

### Triage Activity

1. **Widgets (sections):** You will be able to review information entered by the Triage nurse such as Chief Complaint, VS, History, along with a link to further information such as OB/GYN status and Gender/Sexuality via the History 'jump to' arrow . Add information in any widget (section) that has a pencil.



Home Meds can be reviewed in this activity.

Mark as reviewed all sections by clicking **Mark All as Reviewed** button at the top of the screen.



2. **PIT Provider Time** – this is documentation utilized by a provider in triage who is going to start the work-up of the patient but will move the attending into a bed in the ED for an attending to complete the patient workup/visit. Filing First Provider Contact stops the Door to Doc clock metric.



3. **ED ECG Reading & ST Elevation** – Documentation for the provider to use when documenting an initial read of a first ECG for a patient experiencing chest pain. This captures the date/time of reading and whether or not there is ST Elevation. There is also a link to an ECG Progress note if warranted.

## Workup Activity

The Workup activity has BPA advisories, results, VS, and the ED Course.

The screenshot displays the Epic Workup interface with several widgets:

- Workup Header:** Includes a "Mark All as Viewed" button and a "Follow-Up Actions" dropdown.
- BPA (Business Process Advisory):** Shows "Other (Advisory: 1)" and a warning: "Allergies have not been verified during this encounter."
- Labs:** A "NEW" badge is present. It lists several test results:
  - COVID-19 PCR (03/07 1514): SARS-CoV-2 P... Detected !!
  - POCT gastric occult blood (03/06 1330): Occult Blood... Negative
  - Hemoglobin A1c (07/09 1621): Hemoglobin A1C 14.2 ^
  - Creatinine (07/09 1621): Creatinine 2.20 ^
  - EGFR CKD-EPI... (07/09 1621): EGFR CKD-EPI... 26 v
  - EGFR CKD-EPI... (07/09 1621): EGFR CKD-EPI... 30 v
- Imaging:** Lists several CT scans:
  - CT head WO contrast (Ordered 12/05/19 1401)
  - CT Abdomen Pelvis Wo Contrast (Ordered 12/05/19 1401)
  - NM Nuclear Medicine Stress Test (Exercise or Pharmacologic) (Ordered 12/05/19 1357)
  - CT Abdomen Pelvis W Contrast (Ordered 11/20/19 0842)
- Medication Status:** A section for tracking medications.
- ECG:** A section for ECG results.
- Vitals:** Shows vital signs for 01/14: Temp 41.1 °C (106 °F) !, Heart Rate 120, SpO2 Pulse —, Resp —, BP 90/60, SpO2 —.
- ED Course:** A text area for notes with a date of 3/22/2020 and time of 2042. Below it are "Accept" and "X" buttons.

When results are returned, there will be a blue icon  **Labs**  that identifies there are new results in that widget. There is also a widget for Vital Signs.

The ED Course allows the provider to begin their ED Provider note by clicking on any result which 'drops' it down to the ED Course widget and then attaches an entered free text note to that result. **Example:** Click on the component for the abnormal Creatinine result and enter a note.

The screenshot shows the ED Course widget with a text box containing the note: "Pt has no history of kidney disease. Will continue with further testing." Below the text box are fields for "Date: 3/22/2020" and "Time: 2042". At the bottom, there is a "Creatinine: 2.20" label with a red upward arrow, and "Accept" and "X" buttons.

Click Accept. The information will file in that widget and can be pulled into the ED Provider note by using the SmartPhrase .edcourse

ED Course

abc ↩ ↻ ? ? + More ▾

🧪 ⬆ **Creatinine: 2.20**

Pt has no history of kidney disease. Will continue with further testing.

Date: 3/22/2020 Time: 2050

✓ Accept ✕

## Orders Activity

The default for the Orders Activity is the ED Quick List. This is a listing of the most common Medications, Labs, Imaging, and Other order types used in the ED. Click on the desired order and it will populate in the Manage Orders sidebar.

Chart Review Results Review Triage Workup Provider Note Orders Scoring Tools Dispo To Do Orders ▾

Orders

Quick List All Orders Active Results Signed & Held Home Meds Order History

Order Sets

Suggested (1) ED Nurse Standing Orders Sepsis

Favorites (3) ED Adult Chest Pain ED Adult Skin Wound (My Version - GTLWC) ED Adult Stroke

ED Quick List POCUS ED PEDS QUICK LIST Procedure Quick List STI Quick List Alternatives to Opiates (ALTO) Images

**MEDICATIONS - Analgesia**

- acetaminophen (TYLENOL) liquid
- acetaminophen (TYLENOL) 325 mg tablet
- aspirin 324 mg chewable tablet
- ibuprofen (ADVIL, MOTRIN) oral suspension
- ibuprofen (ADVIL, MOTRIN) tablet
- ketorolac (TORADOL) injection
- HYDROcodone-acetaminophen (NORCO) 5-325 mg per tablet
- HYDRomorphine (DILAUDID) injection
- Morphine injection
- oxyCODONE-acetaminophen

**Blood Bank**

- Type and Screen

**Cardiac**

- CK total and CKMB
- Pro-BNP
- Troponin I

**Chemistry**

- Basic Metabolic Panel
- Comprehensive Metabolic Panel
- Ethanol
- Lactic Acid, Venous, Whole Blood
- Lipase Level

**Imaging - CT**

- CT ABDOMEN PELVIS WITH ORAL AND IV CONTRAST
- CT Abdomen Pelvis with IV Contrast ONLY
- CT Abdomen Pelvis Without Contrast (Renal Protocol)
- CT Cervical Spine Screening
- CT Head Wo Contrast
- CT Maxillofacial Wo Contrast
- CT NEURO INTERPRETATION OF OUTSIDE FILM (UNCH)
- CTA Chest W Contrast

**MRI**

- MRI Head With Contrast (MIP)

**OTHER ORDERS - Adm**

- ED Admit Decision (ADT)
- ED Transfer to L&D (ADT)

**Medical Consults**

- Inpatient consult to Gen Surgery
- Inpatient consult to Hos
- Inpatient consult to Neu
- Inpatient consult to Neu
- Inpatient consult to Ophthalmology
- Inpatient consult to Orth Surgery
- Inpatient consult to

Manage Orders Order Sets Options

Interactions

Place new orders or order sets + New

Standard ▾ + New

**New Orders**

- Comprehensive Metabolic Panel
  - STAT, First occurrence today at 2055
- acetaminophen (TYLENOL) tablet 650 mg
  - 650 mg, Oral, Once, today at 2055, For 1 dose
  - STAT

Orders not found on any of the available Quick Lists can usually be found by searching in the 'Place new orders or order sets' search field (see above).

Order Sets: If an order set is desired, click on the Order Sets button in the upper right. Choose the order set and then make your choices within that order set. Orders will populate into the side bar to be Signed.

Order Sets

Order Sets

Suggestions

- ED Adult Abdominal Pain
- ED Adult Altered Mental Status
- ED Adult Blood Administration
- ED Adult Chest Pain (My Version - CEJ Chest Pain)
- ED Adult Flank Pain (My Version - CEJ Flank Pain)
- ED Adult GI Bleeding
- ED Adult Headache
- ED Adult Hyperglycemia DKA
- ED Adult Opioid Use Disorder
- ED Adult Respiratory
- ED Adult Seizure
- ED Adult Sepsis
- ED Pediatric Altered Mental Status
- ED Pediatric Procedural Sedation
- ED Pediatric Sepsis
- ED Peds Anaphylaxis
- ED Peds and Adult Sexual Assault
- ED Peds Asthma Wheezing
- ED PEDS BLOOD TRANSFUSION
- ED PEDS Child Abuse
- ED PEDS DKA
- ED Peds Febrile Neonate
- ED PEDS Fever Central Line Immunocompromised
- ED PEDS Seizure

Manage Orders Order Sets Options

Interactions

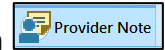
Place new orders or order sets + New

Standard ▾ + New

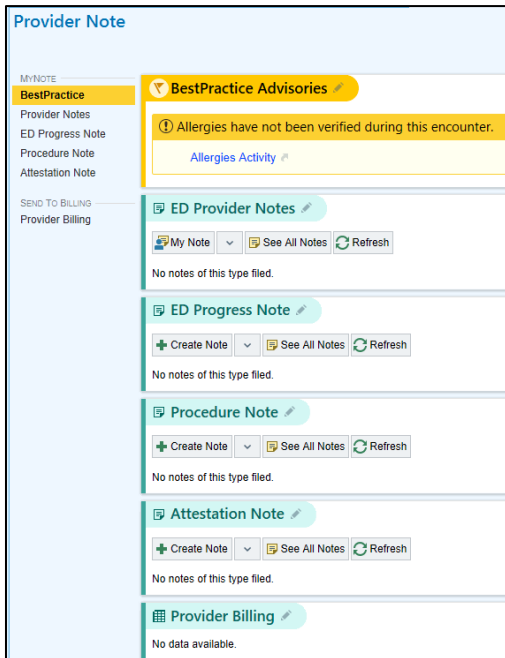
**New Orders**

- Comprehensive Metabolic Panel
  - STAT, First occurrence today at 2055
- acetaminophen (TYLENOL) tablet 650 mg
  - 650 mg, Oral, Once, today at 2055, For 1 dose
  - STAT

## Provider Note Activity:



ED Providers do not go to Notes Activity to document their notes. The ED note types are all found in activity tab.



1. **Provider Notes** – this would be your ED Provider note. It can be signed, shared, or pended. If you wish to use NoteWriter, you can click on the My Note button. If you wish to pull in a template, you can click the drop-down arrow and choose Blank Note.

**NOTE:** If you have a patient who started through the Provider in Triage (PIT) process, you will see the ED Provider note started by that provider and shared with you. Click on the note and continue documentation below the Triage note. Sign your note when complete.

2. **ED Progress note** – this is used for short notes if picking up a patient from another provider who has already completed the ED Provider note OR used for patients who are waiting to be transferred to another facility, such as Behavioral Health patients, as an update to the original ED Provider note.
3. **ED Procedure note** – this is used to document procedures and is in NoteWriter format.
4. **Attestation note** – this is to attest to a resident’s care of a patient.

**Dispo Activity:**

Dispo activity houses all of the discharge/admit documentation.

The screenshot shows the Epic@UNC Dispo (Disposition) interface. The left column contains several widgets: Clinical Impression (with 'Add from Problem List' and 'Add'/'Associate' buttons), Bed Request (with 'New Order' button and three order types: ED Admit Decision, ED Transfer to L&D, and Place Patient in ED Psych), PDMP Report (with 'New Order' button), ED/Orders/Rx/Amb Ref (with 'New Order' button), Follow Up Nurse (with 'New' button), RDC Referral (with 'New' button and a table of referrals), and BestPractice Advisories (with 'Follow-Up Actions' button). The right column contains: Discharge Inst (with 'Add' button and 'Patient's Written Language' dropdown), Work/School Excuse (with 'New' button), Follow-Up (with 'Suggestions' dropdown), Disposition (with buttons for Discharge, Transfer to Another Facility, HBR ED to UNC ED, AMA, Eloped, Expired, and LWBS after Triage), and Chart Status (with a refresh button).

## LEFT COLUMN:

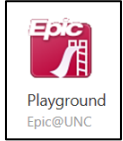
- Clinical Impression:** There may be some suggested depending on the Chief Complaint, however, you can search in the 'Add a new Impression' search field.
- Bed Request:** If you are **ADMITTING** a patient, use the ED Admit Decision order in the Bed Request widget. This will be sent to Bed Planning as a heads-up. It will not assign a bed. If sending a patient that has been medically screened and needs to go to L&D, use the ED Transfer to L&D order, if the patient is being moved to the BHED (Behavioral Health area), use the Place Patient in ED Psych order.
- PDMP report:** Link to the PDMP.
- ED/Orders/Rx/Amb Ref:** This Manage Orders activity allows you to place both ED orders that you wish to have acted upon before the patient leaves OR discharge orders for prescriptions and referrals. Click +New and search for the order. **NOTE:** ED Providers do NOT place a discharge order. They place an ED Disposition.
- Follow up nurse:** Can be used to send an In Basket message to the resource nurse for follow-up with a patient.
- RDC Referral:** Won't be used within the main ED.

## RIGHT COLUMN

- Discharge Inst:** You can add suggested attachments or search by the search field, or clicking the hyperlink to Clinical References. Patient instructions are free-text or SmartPhrases/SmartTexts can be pulled into that field.
- Work/School Excuse:** These are used for patients and/or caregivers. Click +Add, complete the note and click Print, then Accept. This will print separately from the AVS.
- Follow Up:** This is for patient follow-up information.
- Disposition:** Set the Disposition. Each Disposition will populate appropriate SmartText in the comment. There are three dispositions that will populate other widgets for documentation. The AMA disposition will populate the AMA form, Transfer to Another Facility will populate the EMTALA form, and Expired will populate the Preliminary COD documentation.
- Bottom Right:** Preview AVS button will take you into the AVS to review and print.

**PLAYGROUND:**

In your My App, you can go to the Epic@UNC folder and log into Playground (PLY) environment.



You can practice with any patient in the EMERG UNCH department. The login user ID for PLY is: edmd01, edmd02, edmd03.....edmd10 with password: train.

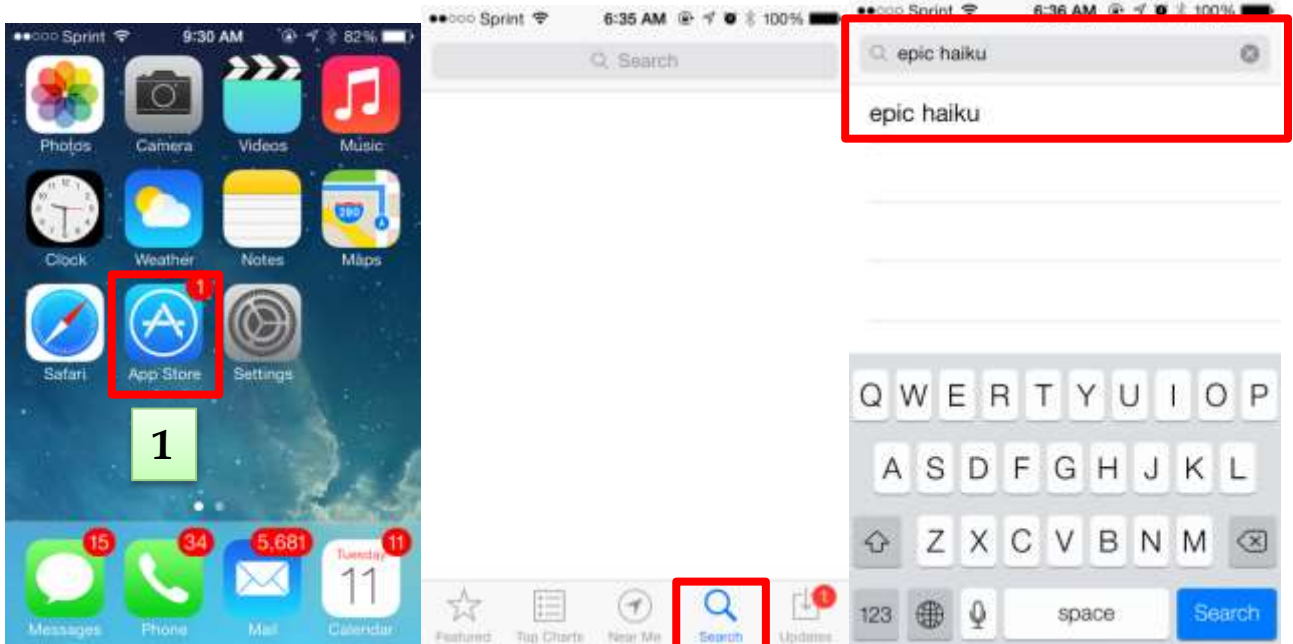
# TIP SHEET


## Accessing Haiku on the iPhone for the First Time

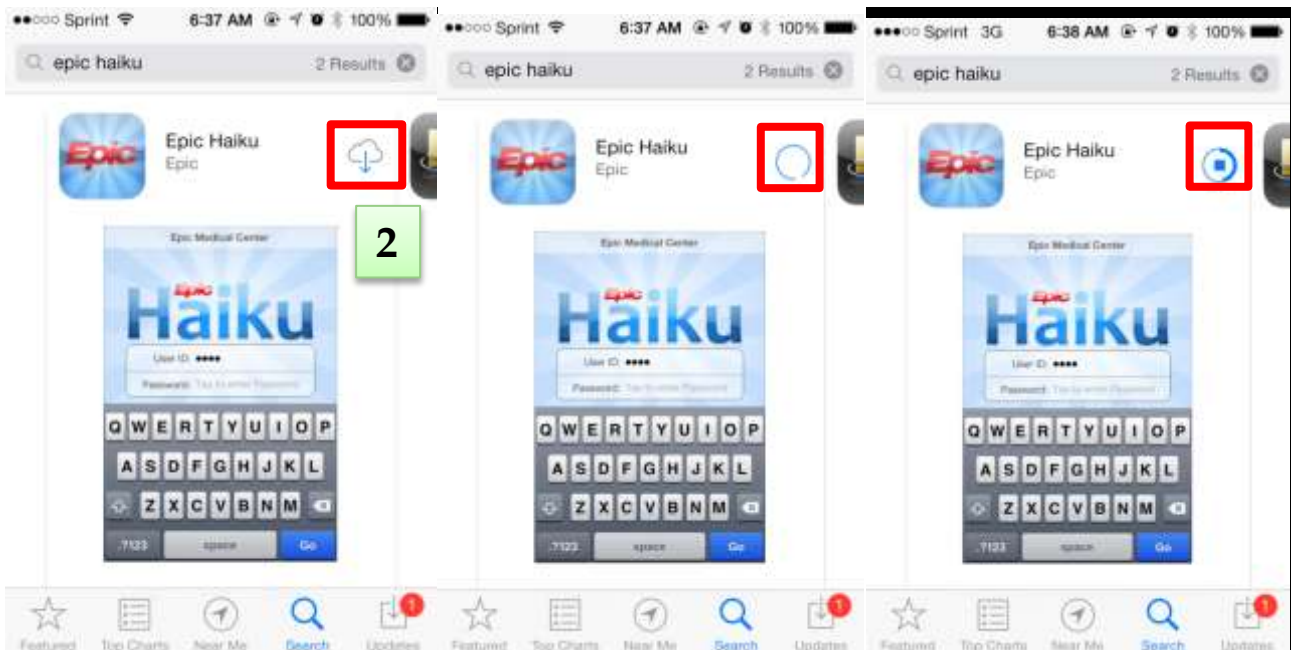
Before accessing the mobile applications Haiku for the iPhone or Android and Canto for the iPad, you must first setup your connection with the UNCHC servers.

### Downloading the Haiku Application

1. You must first download the Haiku application: Access the App store and search for "Epic Haiku."



2. The first application to return will be the mobile device application for your use. Touch the Cloud icon to begin downloading the application. The Cloud icon changes to a rotating circle as it processes the request and you can track the download progress as the  makes its way to a complete bolded circle.

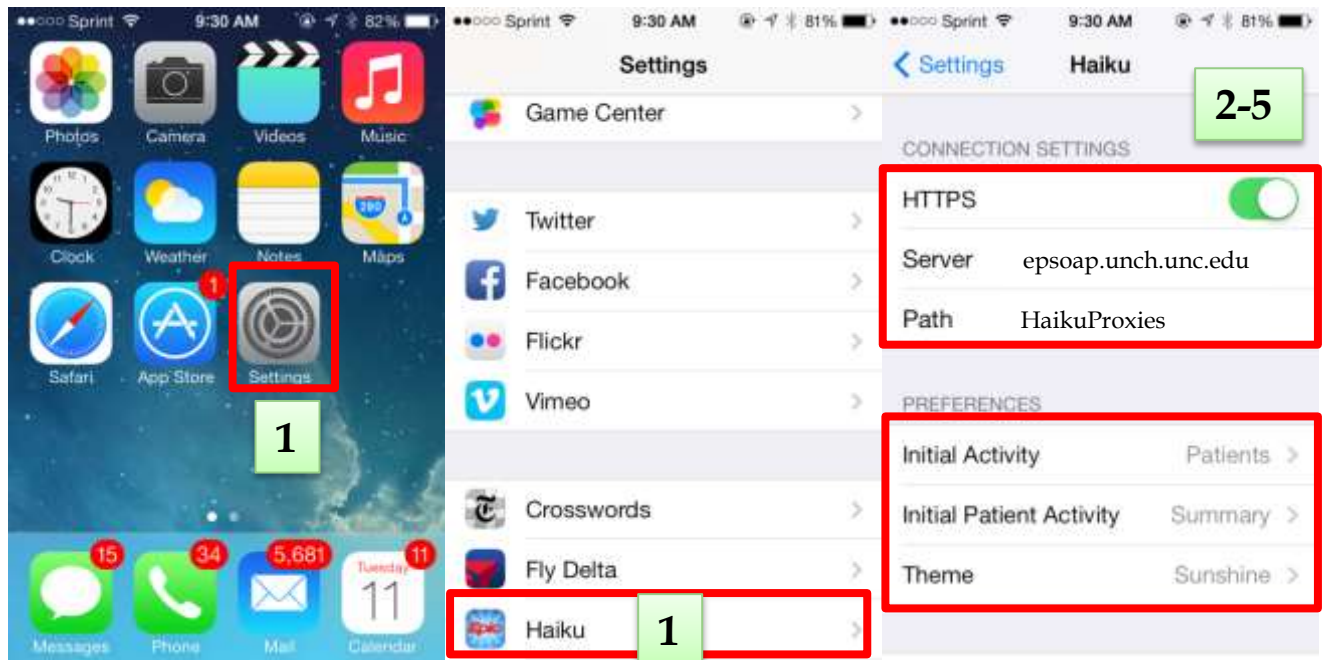






## Establishing a Connection to the UNCHC Server

1. Now that you have downloaded the application you must set up your iPhone to access the UNCHC database: Open settings on your iPhone. Access the Haiku application in settings.
2. Set the HTTPS option to ON (it will display bright green).
3. Set the server option to "epsoap.unch.unc.edu"
4. Set the Path option to "HaikuProxies."
5. If you would like, in the settings you can set your home log in screen by changing your preferences.



## Login for the First Time

1. Now that you have completed all setting options necessary to connect your Haiku application to the UNCHC database, you can access the application from your Haiku icon.
2. The first time accessing the application, you will be prompted with a License Agreement. Read the agreement and Accept.
3. Enter your Hyperspace login information to get started.





## FAQ

- What if I own an iPod touch?
  - You can access Haiku on an iPod touch connected to the internet. Follow the same setup steps detailed above.
- On how many devices can I download Haiku?
  - You can download Haiku on as many devices as you wish. You will be required to enter your log in credentials every time you access to application regardless of device to verify your identity.
- Where can I learn more?
  - A Quick Start Guide with additional details and information on how to use Haiku and Canto (the iPad application) can be found on the training site for your review under the Mobile Applications directory.

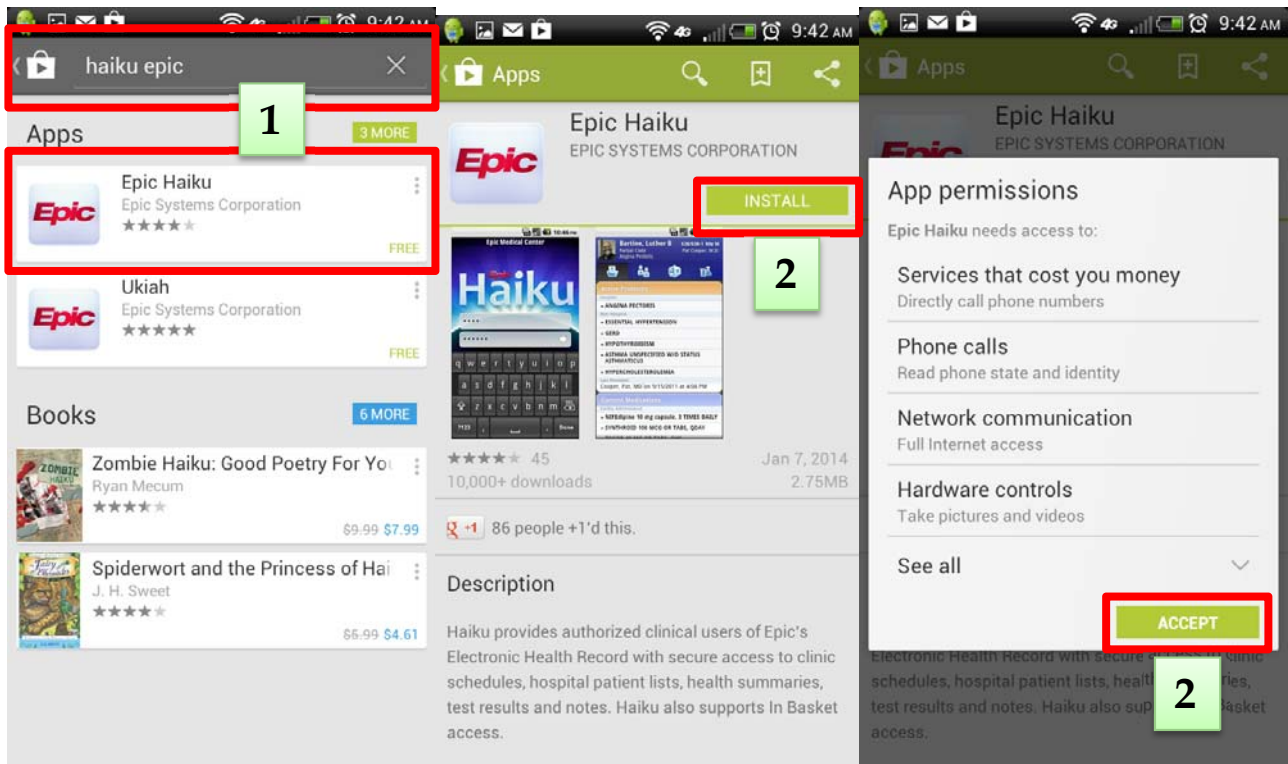
## TIP SHEET

### Accessing Haiku on the Android for the First Time

Before accessing the mobile applications Haiku for the iPhone or Android and Canto for the iPad, you must first setup your connection with the UNCHC servers.

#### Downloading the Haiku Application

1. You must first download the Haiku application: Access the Play store and search for “Haiku Epic.”

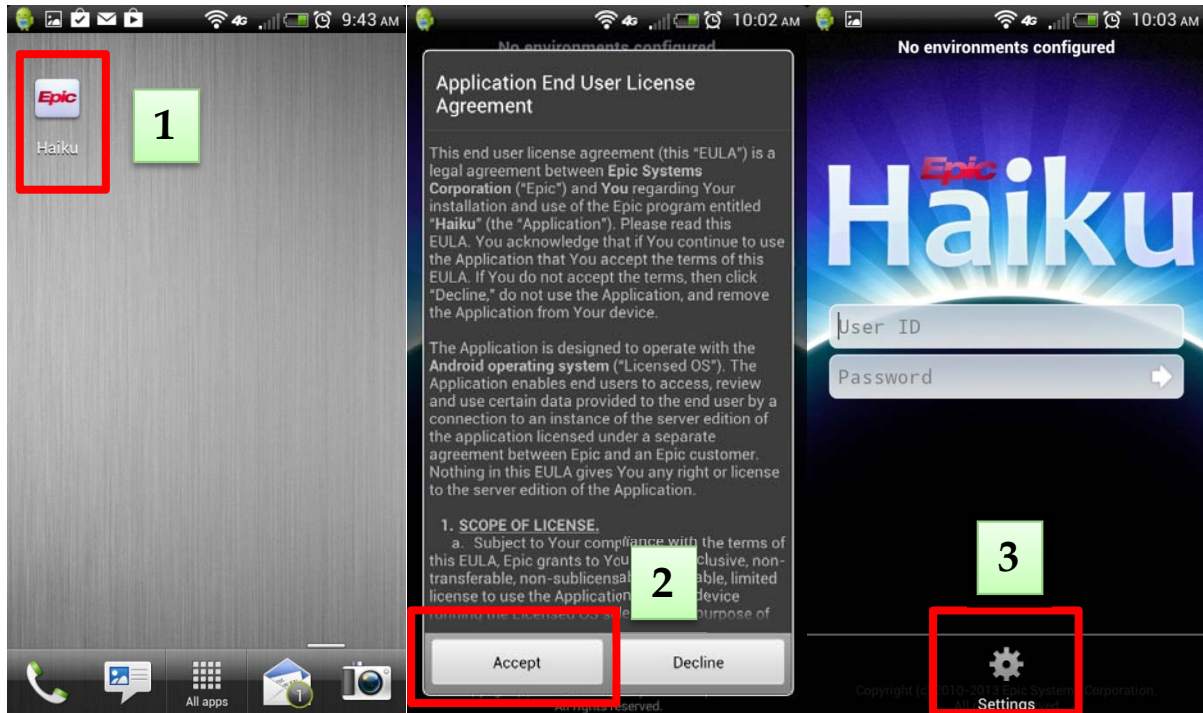


2. The first application to return will be the mobile device application for your use. Select Install to begin downloading the application. You will be prompted with an App permissions screen. Click Accept.
3. Once downloaded your phone will display a screen with Open and Uninstall options, and the icon will be available alongside your other downloaded apps.



## Establishing a Connection to the UNCHC Server

1. Now that you have downloaded the application you must set up your Android to access the UNCHC database: Locate and open the Haiku application icon on your phone.
2. You will be prompted with an Application End User License Agreement. Read and accept this agreement.
3. Select Settings from the bottom of the Haiku login screen. This will display the Haiku setup screen.



4. Set HTTPS to On by checking the box.
5. Set the server option to "epsoap.unch.unc.edu"
6. Set the Path option to "HaikuProxies."
7. If you would like, in the settings you can set your home log in screen by changing your personalization section.





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