Cooper University Hospital

Epic Reference Guide – Medical Student

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Epic Help

Contact the Help Desk

If you ever forget your Epic password or have a question about Epic, call the **Help Desk**.

1. Call **(856) 968-7166**
2. If they ask you for your computer's **IP Address**, here is how to find it:
    - All Programs > Cooper Tools > My Computer Info

Haiku & Canto

Haiku is Epic's mobile app for Android or iOS phones. Canto is Epic's mobile app for use with the Apple iPad.

Install Haiku on Android Phone

1. Enter the **Play Store**
2. Search for **Haiku** and select **Epic Haiku**

3. Install Epic Haiku and then open the app
4. Once the app is open, select the 3 dot menu

5. Select **Settings**
6. Enter the following settings:
    a. **Server**: mobileapps.cooperhealth.edu
    b. **Path**: Haiku-mobile
    c. **HTTPS**: check the box
    d. **Remember User ID**: check the box if you want the app to remember your user ID each time

7. Select **Back** to return to the log in page
8. Enter your user ID and password and select **Log In**

Install Haiku on iPhone

1. Go to the **App Store**
2. Search for **Haiku** and select **Epic Haiku**

3. Install Epic Haiku
4. Go to **Settings** from the Home screen
5. Find **Haiku** in the list of apps
6. Enter the following settings:
    a. **HTTPS**: slide to On (green)
    b. **Server**: mobileapps.cooperhealth.edu
    c. **Path**: Haiku-mobile

7. Find and launch the installed Haiku app from your Home screen

8. Enter your user ID and password and select **Go**

Install Canto on iPad

1. Go to the **App Store**
2. Search for **Canto**

3. **Install** Epic Canto
4. Go to **Settings** from the Home screen
5. Find **Canto** in the list of apps
6. Enter the following settings:
    a. **HTTPS**: slide to On (green)
    b. **Server**: mobileapps.cooperhealth.edu
    c. **Path**: Haiku-mobile

7. Find and launch the installed Canto app from the Home screen

8. Enter your user ID and password and select the Go arrow

Using Netscaler for Remote Access

NetScaler is an application system which provides remote access to your Cooper applications and E-mail, as well as the Cooper Portal.

Netscaler for iOS & Android Devices

Netscaler can be accessed on iPhone, iPad and Android devices.

1. Go to the **App Store** (iOS) or **Play Store** (Android) and download the **Citrix Receiver** app.
2. Enter the following General settings for the Citrix Receiver:
    a. **Host**: Remote.Cooperhealth.edu
    b. **User Name**: Cooper User Name (Last-First)
    c. **Password**: Cooper Password
    d. **Domain**: CHSMAIL
    e. **Security Token**: Default setting

!	If you have any issues with the Citrix Receiver, please uninstall and re-install the app

Installing Netscaler for Windows Explorer

0. Open Internet Explorer and type in the NetScaler URL: http://remote.cooperhealth.edu
1. Enter Cooper Username and Password
2. Review the next screen regarding the download to check your system for compatibility

3. ANALYSIS INSTALLATION: Select **Install** and follow the instructions. Then select **Finish.**

4. CLIENT DOWNLOAD AND INSTALL: Select the checkbox and click **Download.**

ActiveX Prompt: If prompted to run ActiveX Control add-on, click on the Information Bar (at the top of the page) and select **Run ActiveX Control** from the menu.

5. Once you are logged in, take note of the two tabs at the top: **Applications** and **Desktop**
   a. **Applications**- this tab will give you access to the applications that you have access to

b. **Desktop**- this tab will give you access to Windows Desktop, which acts as a remote computer session that mimics a generic Cooper computer with Microsoft Office and access to work files

!	If you have any questions or concerns, please contact our Helpdesk at (856)-968-7166

Personalization & Setup

Choosing Your Login Department

When you first log into Epic, you will see a red stop sign in the Department field. This means that the department is a required field.

1. Click the magnifying glass in the Department field, allowing search for the appropriate department
2. Your login department will differ depending on if you are logging into the inpatient or ambulatory environment.
3. Your login department is the location where you are working. This would include the mnemonic for the location and the specialty.
    i. For example: Nephrology staff may select KHM Nephrology (Cherry Hill), NES Nephrology (Mannington), GRA Nephrology (Thorofare), etc.

> Anyone currently working in the ambulatory office will be able to tell you what to type at the department prompt. It is important to log onto the correct department!

Log Out

Always remember to **Log Out/Swipe Out** when you are ready to step away from the workstation! This helps to maintain patient confidentiality. In addition, you do not want another user to do anything in Epic with your log on information.

Reviewing Your Patients Information From the Schedule

- Quickly review and find meaningful patient information from the schedule.

The schedule

- You can review high level information about an individual patient
  - Reports: review pertinent results or reminders regarding the patient from the **SnapShot** report.
    - Can customize which reports are available as buttons using the wrench icon

At-A-Glance Information In The Schedule

Absorb patient and appointment information. Color-coded statuses tell you where your patients are in their visit.

To view your calendar and department folders, select the arrow next to

You can **pin the calendar and folders to the side by clicking the pushpin**. To hide the calendar and folders just click the pushpin again.

The Status Column Updates Automatically Through Events Triggered In The System

Waiting status, may appear if the patient is waiting to be roomed, once the MA and/or provider documents on the encounter the status will update automatically.

Blue = Arrived	Pink = Rooming in Progress	Yellow = Visit in Progress
Mint Green = Signed	Gray = Not Seen/No Show	Green = Visit Complete
Red = Waiting		

You can **reset the status of the appointment when necessary**, by left-clicking the color-coded bar for the appointment. The current status of the appointment will determine the available options to reset the appointment status.

Update Patient Status on the Schedule (Dots)

When viewing the schedule in Epic, you will notice the ability to assign various colored dots to an appointment. These dots are used to communicate certain statuses to the RNs, physicians, and office staff.

1. To add a dot to an appointment on the schedule, simply click in the far left column of the schedule
2. Select the appropriate color based on the patient's status.

	Below is the list of standard meanings for each dot color: • Green – Patient arrived • Blue - Patient triaged by MA • Yellow- Patient roomed, triaged, ready to be seen • White - Patient needs procedure • Red – Visit complete • Black- Patient was a no-show/cancelled appointment

Appointment Comment Column

When rows are not condensed you will see up to 3 lines of appointment notes. To see if there is additional information you will click on the patient row and hover over the appointment note column.

Specialty Comments ▲	Status	Meds Due	Time	ACO Patient?	Type	Patient Name	Appt Comment
	Visit in Progress Checked in: 4:40 PM		4:30 PM	(None)	ESTABLISHED VISIT ENTERPRISE	Ambulatory, Lois (40 y.o. F)	testing HeroCare AVS
	Visit Complete Checked in: 12:14 PM		12:00 PM	(None)	FOLLOW -UP	Test, Jaime (51 y.o. M)	
	Signed Checked in: 4:45 PM		4:45 PM	(None)	ESTABLISHED VISIT ENTERPRISE	Ambulatory, Harry P (38 y.o. M)	testing a patient without herocare for avs

Preview Pane

You can now show, hide, and reposition the preview pane.

Click the dropdown next to Preview. Select the checkbox next to Auto-position, Bottom or Right.

To display the pane view just check the box next to Preview, to hide pane view uncheck the box.

Search For Schedule Columns

When you customize or create a schedule, find the info you need with a search field. **You can add standard columns, or more compact columns that include multiple pieces of information.**

Choose a **default column** to sort on in your patient lists and a default sorting order. If no column is selected, the patient list is sorted on the first column in the list in ascending order.

Pre-Charting (FYI: Providers find this most helpful)

Get a head-start on the chart before the patient arrives, this is called pre-charting. Pre-charting is automatically launched when you open the appointment before the patient presents.

- Pre-Charting is available to clinicians prior to the patient arriving for their scheduled appointment. This feature is used mainly by the providers to get a head start on charting.

- Any notes written before the patient checks in are accessible to the author and other clinicians who work in this encounter. Other clinical staff can't find these notes elsewhere in the chart.

- Any notes/orders that are not signed, and communications not sent are deleted by the system a set number of days after the appointment if the patient never arrives. You can view any notes that you write before the system deletes them and copy those notes forward to a visit within that time frame.

- Any orders that are signed are carried out regardless of whether the patient arrives for the scheduled appointment. If the patient no-shows, cancels, or reschedules the visit, the provider needs to cancel any orders that they don't want to remain active.

HIPPA and Break-the-Glass

A HIPPA violation occurs when an employee accesses the medical record of any individual that is not related to the performance of the employee's job responsibilities (**treatment, payment** or **operations**); unless Cooper has a signed written authorization form from the patient authorizing the employee to allow access to their medical record.

1. As a Cooper employee you are encouraged to utilize "My Chart" aka "My Cooper" to access your own medical record. If you access your own chart in **Epic** you are **not permitted to make any changes/updates** to your information.
2. You are <u>not</u> permitted to access fellow employees or family members charts (without on file authorization) unless it is directly related for **Treatment, Operations, and or Payment.**
   a. **Treatment**: the provision, coordination or management of healthcare. Coordination and management of health care with third party consultation
   b. **Operations**: Quality Assurance, performance improvement, auditing
   c. **Payment**: determining eligibility, billing, claims management
3. **Break-the-Glass is Epic's security measure for tracking user access to patient charts that are marked as secured.** Reasons for this type of security vary, some examples include: patients who are Cooper employees, those on Cooper's medical staff, VIP's and any patient who request to remain anonymous.

- When a patient is registered with the Break-the-Glass security measure, a warning message will appear when the patient chart is accessed. If you accidentally selected the patient you should **Cancel** to back out.
- The Break-the-Glass warning box requires that you identify the reason for accessing the patient chart, you can click the magnifying glass to see what your options are. After making a selection, enter your Epic password. You should also free text type further explanation for opening the chart for clarification: **Think TOP: Treatment, Operations, and Payment.**
- When you "break the glass" and accesses a chart, your actions will be monitored. Cooper utilizes "Fair Warning" for patient privacy – this detects unauthorized access to medical records and sends an alert to security for further investigation. For questions please contact Cooper's Chief Information Security and Privacy Officer, Phil Curran via e-mail or PrivacyOfficer@CooperHealth.edu.

- It violates patient and Cooper policy to access a patient record for reasons such as curiosity or to check on the condition of a coworker, VIP, neighbor, friend, or relative who has not expressly authorized you, in writing, to obtain medical information. To clarify, it is against policy to access records other than your own unless it is directly related to the 3 top reasons, **treatment, operations or payment**. For any questions for accessing patient records please follow up with your manager.
- Cooper Employees are encouraged to use MyCooper to access your own record, however if you access your own chart in Epic you are **not permitted to make any changes/updates** to your information.
- Accessing the medical record of an adult family member living within your household with a signed written authorization: the authorization form must be signed prior to the access, scanned into the patient's Epic medical record and is good for 1 year. Cooper prefers that, in lieu of accessing the patient's medical record directly, you set up a proxy access in MyCooper, which can be accomplished by contacting the patient's PCP office.
- Accessing the medical record of an adult family member living within your household outside of payment, treatment and operations without a signed written authorization is against policy: first offense – written warning and re-education, assuming no malicious intent, second offense – termination.
- Accessing the medical record of your custodial minor family member under the age of 12 is acceptable, assuming no malicious intent.
- Accessing the medical record of your own minor family member outside of payment, treatment and operations age 12 and older is against policy: first offense – written warning and re-education, assuming no malicious intent, second offense – termination.
- Accessing the medical record of all other adult individuals with a signed written authorization. The authorization form must be signed prior to the access, scanned into the patient's Epic medical record and is good for 1 year. (Once again, Cooper prefers that you set up proxy access in MyCooper in lieu of accessing the patient record directly).
- Accessing the medical record of all other adult individuals outside of **payment, treatment** and **operations** without a signed written authorization is against policy. First offense – termination.

2019 Hospital National Patient Safety Goals:

Identify Patients Correctly: NPSG.01.01.01: Use at least two ways to identify patients. For example, use the patient's name and date of birth. This is done to make sure that each patient gets the correct medicine and treatment.

MyCooper

Helping our patients sign up for a MyCooper account is now easier than ever. **MyCooper** sign-up is available from the **patient banner**. When you open the patient's chart you will select the **MyCooper: Inactive** link from the patient banner.

This will allow you to send the patient a MyCooper sign-up letter via e-mail by clicking **Send Email**. From here you may also request **Proxy Access**.

In addition, MyCooper sign-up is also available from the **Rooming Activity**. While rooming the patient, select **MyChart Sign-up**.

Then select **MyCooper Signup**.

Next help the patient follow the steps to create a **Username** and **Password**, then select a **security question**.

Find Patient Information Fast with Chart Search

Save time and clicks with Chart Search, a powerful search engine right in Epic. Instead of looking through the patient's chart or browsing Hyperspace menus, you can enter keywords in a search box to find the information and activities you need.

Try It Out

Find Patient Information

1. Open a patient's chart, go to the search bar in the upper-right corner of Hyperspace, and enter a term related to the patient's chart. For example, if the patient has a history of hypertension, enter "hypertension" or the abbreviation "htn". Press **ENTER.** Your search results appear in the sidebar.
2. Use the buttons at the top of the sidebar to filter your search results. For example, click **Labs** to see a list of the patient's labs that are related to his hypertension diagnosis. You can click and then select **Group by encounter** to change how Chart Search groups your results: by encounter or by date.
3. Hover over one of the search results to preview the content.
4. Click a search result to open a report related to the result or click the encounter heading to open the associated encounter report.

Jump to an Activity

1. In the upper-right corner of the screen, enter part of an activity name in the search bar. For example, enter "calc" for Calculator or "sc" for Schedule. As you type, Chart Search shows a list of possible matches for your search.
2. Click the name of the activity that you want to open or, with the correct activity selected, press **ENTER** to open the activity.

Search Like a Pro

- To save time, press "CTRL+SPACEBAR" to automatically move your cursor to the search bar and type your search term.
- When you search for a term, Chart Search also returns results for common synonyms of that term and related terms. For example, if you search for arrhythmia, Chart Search returns results related to arrhythmia, chest pain, and fibrillation. Similarly, a search for HTN returns results for hypertension. This also means you can find medications using either their generic or brand names.
  If you're looking for a specific piece of information and don't want to see results for synonyms or related terms, enter your search terms in quotation marks to find results that include only that exact phrase.
- To pull in your most recent search, press "=".
- Quickly perform searches by highlighting text in a report. Then, right-click on it and pick the **Search** option to look for that information in the current patient's chart.
- Refine your search results by using the AND / OR operators. For example, if you search for "CHF AND pain", only results related to both of these terms appear. A search for "CHF OR pain" finds results related to either term. You can also use a comma instead of AND, like by searching for "CHF, pain".

You Can Also...

Ctrl + Spacebar will always **jump you right to Chart Search** so you don’t have to reach for the mouse.

Adding SmartTexts (student note templates) as Favorites

Student Notes: your student note will not be a part of the patient's permanent medical record. You will use Smart Text Templates to compose the note, this tool will allow you to practice note writing in Epic.

There are specific note templates (SmartTexts) built for Medical Students to use. It is helpful to add your most commonly-used SmartTexts as favorites, as it will prevent you from having to search through the SmartText database each time you wish to write a note.

1. Go to the **Notes** activity
2. Click **New Note**
3. In the **Insert Smart Text** field, type **CMSRU** then press **Enter**

4. In the **SmartText Selection** window, click once to highlight the SmartText you want.
5. Click **Add to Favorites.**
6. Click **Cancel** to save your favorite selections without inserting them into your note.
7. Add other commonly used SmartTexts to your favorites by searching for them in the **Match** field.
8. Select the Favorites tab and click **Make Tab Default**.

   From now on, when you click in a new note, your favorite SmartTexts appear.

   Additionally, when you search for a SmartText in the **Insert SmartText** field, only your favorites appear.

   If you can't find the SmartText you need on your Favorites tab, select the Encounter Matches tab and and search for it in the **Match** field.
9. Click **Accept** to insert the SmartText in your note, or click **Cancel** to save your favorite selections without inserting them into your note.

Writing Student Notes

Note type	Use following **SmartText** to write notes:
Student Progress Note	▪ CUH AMB CMSRU ADULT HEALTH PROGRESS NOTE
	▪ CUH AMB CMSRU OB/GYN PROGRESS NOTE
	▪ CUH AMB CMSRU PEDIATRIC PROGRESS NOTE
	Use following **SmartText** to write notes:
Student Initial Note	▪ CUH AMB CMSRU ADULT HEALTH INITIAL NOTE
	▪ CUH AMB CMSRU OB/GYN INITIAL NOTE
	▪ CUH AMB CMSRU PEDIATRIC INITIAL NOTE

To pull this information into a note…	Use these **SmartLinks**:
Recent lab results from this visit	.thisvisit
Current list of medications	.cmed
Your name	.me
Today's date	.td
The patient's age, name, and sex	.id

Additional Epic Tips

Jump Start Routine Notes with Speed Buttons

Add personalized buttons to your Notes navigator sections to quickly write routine notes. You can create a button that opens a note window containing a SmartText.

1. Click the blue arrow next to Student Notes
2. Click the in the upper-right corner of a notes navigator section. The Notes Personalization window opens.
3. Click to add a new button.
    a. In the **Caption** field, enter the name that you want to appear on the button. Such as Adult Progress Note
    b. Add the SmartText templte.
4. Click **Accept.** The button appears at the top of your Progress Notes section.
5. Click again to add or edit your note buttons.

The speed buttons you have created will display whenever you click on the blue arrow next to the words progress notes in the navigator.

Search a Patient's Chart

If you're looking for specific patient information but aren't sure where to find it, search the patient's chart. For example, enter "hypertension" to look for problems, clinical notes, medications, and other orders related to that condition.

1. In the patient's chart, enter a keyword in the **Search** field in the upper right and press **Enter**. Results appear in the Search sidebar.
2. Filter the results using the buttons at the top of the **Search** sidebar. For example, click **Meds** to see only the patient's medications related to hypertension.

   a. Click to sort the search results by date.
   b. Click to group the search results by encounter.

3. Hover over a search result to view more details in a bubble.
4. Click a search result to open a full report.

Create Quick Filters in Chart Review

You can find specific patient data quickly in Chart Review by creating Quick Filters and selecting criteria to limit which information appears. You can also filter on specific medications, orders, chief complaints, and more.

1. In Chart Review, select the Encounters tab and click **Filters**.
2. Select a filter type such as **Provider**.
3. Select the specific criteria on which you want to filter.
4. Click **Save** and enter a specific name for your Quick Filter, then click **Accept.**

You Can Also...

- Filter on multiple criteria in a Quick Filter. To do so, repeat steps 2 and 3. For example, to see all encounters in which you prescribed Lipitor, select the **Medication** filter type and select Lipitor as your specific criterion.
- Enter dates in the **Date Range** fields to further restrict the data that appears.

Patient Status on the Schedule (Dots)

When viewing the schedule in Epic, you will notice the ability to assign various colored dots to an appointment. These dots are used to communicate certain statuses to the RNs, physicians, and office staff.

3. To add a dot to an appointment on the schedule, simply click in the far left column of the schedule
4. Select the appropriate color based on the patient's status.

	Below is the list of standard meanings for each dot color: • Green – Patient arrived • Blue - Patient triaged by MA • Yellow- Patient roomed, triaged, ready to be seen • White - Patient needs procedure • Red – Visit complete • Black- Patient was a no-show/cancelled appointment

Care Everywhere - Review clinical data from outside organizations

Allows Epic customers to quickly and securely exchange patient information with each other. Patients must first give consent. It provides access to data such as notes, labs, medications, allergies etc. Some area hospitals that also use Epic are: Temple Health, The Children's Hospital of Philadelphia, University of Pennsylvania Health Systems, Hackensack University Medical Center, The Mount Sinai Health System, and Nemours to name a few.

How to request records:

- **AMBULATORY:** From the Visit Navigator, click **Care Everywhere**
- If the patient has been seen at a nearby Epic organization, you will see a link to View Outside Records

- If the patient has been seen at an Epic organization outside of a 50 mile radius of their home you can use the link to Request Outside Record (you will need to be in the Visit Navigator)
- Then search the database for an organization, city or state
- For some organizations, patient authorization is required
- If so, click the **collect authorization** link
- Click **Print** to print authorization forms
- Once the patient has signed the authorization forms, click the **Signed** button
- Next, click the **View Chart** button to access patient information

Viewing Patient Information:

A screen similar to the one below will appear allowing you to select the tabs at the top for the information you would like to collect.

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Using SmartLinks

You can use SmartLinks in any text field that contains this toolbar:

To insert a SmartLink in your text (or add it to a SmartPhrase), enter a period followed by the SmartLink abbreviation. After you've selected the appropriate SmartLink, press **Spacebar** to accept it and continue typing. If you press **Enter** with the SmartLink selected, your cursor moves to the next line.

Allergies

SmartLink	Description
alg	Summary of patient's allergies
algenc	Patient's allergies as of the current encounter, with last reviewed date
algp	Patient's allergies in prose format
allergy	Patient's allergies presented in a table

Date and time

SmartLink	Description
ed	Date of the current encounter
fdate	Formal date
now	Current time
td	Today's date

Demographics

SmartLink	Description
id	Patient's age, name, and sex
fname	Patient's first name
lname	Patient's last name
name	Patient's full name
age	Patient's age as of today
sex	Patient's sex
add	Patient's full address

dob	Patient's date of birth
ph	Patient's phone numbers
hmph	Patient's home phone number
wkph	Patient's work phone number
payor	Patient's payor and plan information
pcp	Patient's primary care provider
ss	Patient's Social Security number
mrn	Patient's medical record number

Diagnoses

SmartLink	Description
assessplan	Encounter diagnoses in prose format, along with associated orders and order details
dx	Short diagnoses
diag	Encounter diagnoses, along with the orders associated with each diagnosis
diagx	Abbreviated encounter diagnoses
diagprim	Primary diagnosis with ICD code

Future appointments

SmartLink	Description
afutappt	A list of all future appointments. If no appointments exist, the following text appears: "No future appointments."

Generic reference to patient

These SmartLinks are useful for creating SmartPhrases and SmartTexts.

SmartLink	Description
his	"his" or "her"
caphis	"His" or "Her"
he	"he" or "she"
caphe	"He" or "She"
him	"him" or "her"

Growth chart

SmartLink	Description
bmifa	Body mass index-for-age percentile (0-20 years)
lbmifa	Body mass index-for-age growth percentile (2-20 years) for the last visit in which the patient's height and weight were recorded
hcfa	Head circumference-for-age percentile (0-36 months)
lhcfa	Head circumference-for-age percentile (0-36 months) for the last visit in which the patient's head circumference was recorded
sfa	Stature-for-age percentile (0-20 years)
lsfa	Stature-for-age percentile (0-20 years) for the last visit in which the patient's height was recorded
wfa	Weight-for-age percentile (0-20 years)
lwfa	Weight-for-age percentile (0-20 years) for the last visit in which the patient's weight was recorded
wfl	Weight-for-recumbent length percentile (0-36 months)
lwfl	Weight-for-recumbent length percentile (0-36 months) for the last visit in which the patient's height and weight were recorded
wfs	Weight-for-stature percentile (2-5 years)
lwfs	Weight-for-stature percentile (2-5 years) for the last visit in which the patient's weight and height were recorded

Health Maintenance

SmartLink	Description
hmlist	Health Maintenance topics due

History

SmartLink	Description
alchx	Alcohol history
alchxp	Alcohol history in prose format
drughx	Drug history
drughxp	Drug history in prose format
famhx	Family history

famhxp	Family history in prose format
ob	Status of pregnancy history (not asked, never pregnant, or history of pregnancy) and information from pregnancy history fields
obhxprose	Status of pregnancy history in prose format
ped	Pediatric history, such as birth weight, birth length, head circumference, discharge weight, and delivery method
pmh	Past medical history
pmhpnn	Past medical history in prose format, excluding negatives
pnmh	Pertinent negatives from a patient's past medical history
psh	Past surgical history
pshp	Past surgical history in prose format
pnsh	Pertinent negatives from a patient's past surgical history
prob	Problem list, not including comments
probl	Extended problem list, including comments
probp	Problem list in prose format
soch	Social history in short form, excluding empty fields
sochx	Social history in long form, excluding empty fields
sochxp	Social history in prose format
tobhx	Tobacco history
tobhxp	Tobacco history in prose format

Immunizations

SmartLink	Description
imm	Immunization history
ims	Most recent immunizations (as opposed to entire history)

Letters-related

SmartLink	Description
encprovnmtitle	Encounter provider's full name and title
refprovlname	Last name of the referring provider for the encounter
me	Your name

Medications

SmartLink	Description
cmed	Current medications
cmeds	Current medications displayed on a single line
dcmed	Medications discontinued in this encounter
encmed	Encounter medication list
encmedp	Encounter medications in prose format
med	Current medications that were ordered before the current encounter
ltmed	Long-term medication information
refill	Requested medications

Obstetrics

SmartLink	Description
edd	Estimated date of delivery
ga	Estimated gestational age
mom	Used in a baby's chart to display the mother's information. Enter the mother's information you want to display as the parameter of this SmartLink. For example, enter the following to display the mother's age: .mom[age Note that this SmartLink functions properly only if you have ADT installed or if you are using an interface capable of linking mother to baby.
ob	Status of pregnancy history and information from pregnancy history fields
obhxprose	Status of pregnancy history in prose format

Orders

SmartLink	Description
encord	List of orders placed during the encounter, along with order comments, scheduling instructions, and order-specific questions with answers and comments
encordnm	List of orders placed during the encounter (names only)

Patient instructions

SmartLink	Description
patinstr	Patient instructions from the encounter

Results

SmartLink	Description
last	Most recent lab results for the specified component after "last" ex) ".lasthct" shows the most recent Hemocrit lab results
resulast	Most recent lab results for the specified component(s) after the bracket ex) ".resulast[HbA1c" shows the newest HbA1c results ex) ".resulast[MCH,HCT" shows the newest results for both MCH and HCT
resultrcnt	All lab results for the specified number of hours or weeks after the bracket ex) ".resultrcnt[1H" shows all results from the past hour ex) ".resultrcnt[1W" shows all results from the past week

Visit information

SmartLink	Description
cc rfv	Chief complaint/reason for visit
enotes	Nursing notes (exam notes) that have been filed
pnotes	Visit progress notes

Vitals

SmartLink	Description
bsa	Body surface area
lastbp	Most recent blood pressure readings*
lasthc	Most recent head circumference measurement*
lastht	Most recent height measurements*
lastpf	Most recent peak flow readings*
lastpulse	Most recent pulse readings*

lastresp	Most recent respiration readings*
lastspo2	Most recent SpO2 readings*
lasttemp	Most recent temperature readings*
lastwt	Most recent weight measurements*
lmp	Date of patient's last menstrual period
lmpvitals	Visit vital signs with date of patient's last menstrual period
vitalsm	All vitals readings for the current encounter, displayed in table format
v	Visit vital signs on one line
vs	Visit vital signs separated by lines, including comments
vsp	Visit vital signs in prose format

The asterisk (*) indicates that the number of readings to show is a parameter in the SmartLink. To use the SmartLink, enter the SmartLink (.lastbp, for example) followed by a left bracket ([) and the number of readings you want to display. For example, enter ".lastbp[2" to pull in the two most recent blood pressure readings on record for the patient.

Navigation

Navigate General Epic Workflows With The Keyboard

You can always look up keyboard shortcuts by clicking the Help icon in a navigator. Use the following keyboard shortcuts to speed up your work in Epic:

Shortcut	Action
F1	Open Help for the current activity.
Ctrl+Space	Open Chart Search.
Shift+F5	See the possible values for a field with a Selection button.
Tab	Move to the next field or button on the page.
Shift+Tab	Move to the previous field or button on the page.
Ctrl+Up Arrow	Move up through activity tabs.
Ctrl+Down Arrow	Move down through activity tabs.
Ctrl+Tab	Move right through open workspaces.
Ctrl+Shift+Tab	Move left through open workspaces.
Ctrl+W	Close the selected workspace.
Ctrl+D	Open the **More** menu.
Ctrl+Alt+S	Secure your Epic session.
Ctrl+Alt+L	Log out of Epic.
Alt+F4	Close Epic.

You can also use the following standard Windows shortcuts in Epic:

Shortcut	Action
Ctrl+A	Select all text.
Ctrl+C	Copy selected text.
Ctrl+X	Cut selected text.
Ctrl+V	Paste selected text.
Ctrl+Z	Undo last action, such as restore a deleted block of text or undo your selection in a SmartList. Use repeatedly to undo more than one action.
Ctrl+Y	Redo the last action you undid.

Navigate An Encounter With The Keyboard

Use the following keyboard shortcuts to move through an encounter workspace:

Shortcut	Action
F7	Open the previous section.
F8	Open the next section.
F9	Open or close the current section.
F5	Refresh the navigator.
Shift+F7	Go to the previous section without opening it.
Shift+F8	Go to the next section without opening it.
Alt+Up Arrow	Move up through the table of contents. The selected section opens when you release the **Alt** key.
Alt+Down Arrow	Move down through the table of contents. The selected section opens when you release the **Alt** key.
Ctrl+Shift+A	Open the **Allergies** section.
Ctrl+Shift+H	Open the **History** section.
Ctrl+Shift+I	Open the **Patient Instructions** section.
Ctrl+Shift+M	Open the Notes activity.
Ctrl+Shift+O	Open the **Meds & Orders** section.
Ctrl+Shift+V	Open the **Vital Signs** section.

Enter Dates And Times Using Shortcuts

Use the following conventions to enter dates and times in Epic:

Convention	Function
t	**Today**. Use this to indicate today's date. You can also use this as a relative date. For example, for today's date, enter "t." For tomorrow's date, enter "t+1."
w	**Week**. Use this for relative dates. For example, for two weeks ago, enter"w-2."
m	Month. Use this for relative dates. For example, to for five months from now, enter "m+5."
y	**Year**. Use this for relative dates. For example, for one year ago, enter "y-1."
n	**Now**. Use this to indicate the current time. You can also use this for relative times. For example, for 30 minutes from now, enter "n+30."

Ambulatory - Glossary

Activity

A feature in Epic that supports a task, such as reviewing the patient's chart or writing a note. Chart Review and Wrap-Up are two common activities used during office visits. Click an activity tab on the left side of the patient's chart to open that activity.

Activity Toolbar

The toolbar at the top of an activity on which you can find buttons for actions you can take related to that activity. For example, in the Wrap-Up activity, you may want to print the After Visit Summary for the patient at the end of an office visit.

Addendum

Information added to or edited in an encounter after it is closed.

After Visit Summary (AVS)

A report summarizing orders, diagnoses, notes, and other information for an encounter that you can print and send home with the patient. Patients can also view After Visit Summaries via MyCooper.

Completion matching

The process by which you enter a partial value in a field (for example, "amox" instead of "amoxicillin") and the system returns all related matches. Any related terms starting with the characters entered are returned, and the results appear in a selection list.

Encounter

A clinical contact. For example, an office visit, an admission, or a telephone encounter. Even if more than one evaluation or procedure takes place at a visit, it is still usually considered one encounter.

Epic button

A button always available in Epic that allows you to access additional menus, such as the Tools, Patient Care, and Admin menus.

Filter

A restriction applied to narrow a list down to only those items that meet your defined criteria. Used frequently in the Chart Review activity to find relevant information. For example, in the Notes tab of Chart Review, you can filter to find only notes that you've written.

Flowsheet

A subset of patient data appearing in chart form. The flowsheet format can be useful when analyzing trends. You can specify a data set and view that data in a flowsheet by clicking the **Lab Flowsheet** button in the Chart Review activity.

Historical medication

A medication that a patient has taken in the past. Entering patient-reported historical medications in Epic helps you to maintain a complete list of the patient's medication history. When medication orders expire or are discontinued, they also become historical medications.

Hyperspace

The integrated platform that hosts most Epic applications, including EpicCare Ambulatory.

Hyperspace toolbar

The set of buttons that appear next to the Epic button and provide for basic navigation and access to common activities. From the Hyperspace toolbar, you can initiate a variety of actions, such as opening your In Basket, accessing your schedule, securing your workstation, and logging out of Hyperspace.

In Basket pool

Used to send a shared message to a group of recipients to request that any one member of the group perform a task. When you send a message to a pool, everyone in that pool gets the message. After one person marks that message as Done, it disappears from the other users' In Baskets. Common examples include transcription pools and phlebotomist pools.

Macro

A tool clinicians can use in NoteWriter to quickly make a pre-defined set of selections on a form.

Log out vs. Secure

To maintain patient confidentiality, you must log out or secure your computer when you leave it. There are two ways to do this:

- Click **Log Out** on the main toolbar.
- Click **Secure** on the main toolbar. The system remembers where you are when you secure a computer, so the next person who logs in with appropriate security sees the same thing.

For example, if you secure the computer while viewing a patient's chart, the next person who logs in is taken directly to the same patient's chart. This is useful when different people are working with the same patient in the same room.

Mark as Done

To indicate that you have reviewed an In Basket message and completed any associated tasks. Messages that are marked as Done are removed from your In Basket after the In Basket is refreshed.

Mark as Reviewed

To indicate that you have reviewed the data and verified its accuracy. **Mark as Reviewed** buttons appear in patient charts in the **Allergies**, **Medications**, **History**, and **Problem List** sections.

Navigator

A series of sections containing documentation tools meant to follow a particular workflow, such as an office visit or a medication refill. The Rooming and Plan activities are examples of common navigators in which you can move from one section to the next to complete your review and documentation of a visit.

Patient header

The section that appears at the top of the patient's chart or encounter workspace that shows important patient information, such as vitals and allergies.

Patient Lookup window

A window that helps you to search for a specific patient using data such as name and date of birth. It also contains a **Recent Patients** tab, where you can select a patient whose chart you recently accessed.

Report toolbar

A toolbar in the In Basket activity that appears above the contents of a message you're viewing. The report toolbar allows you to view related, detailed information about the patient without opening a chart or encounter.

Selection button

A button you can click to select a value for a field from a defined list. The Selection button appears in many fields in Hyperspace as an icon.

Sidebar

A pane that can be opened to the right of your main Hyperspace activity which allows you to work in a second activity alongside the first. For example, you can view and edit your note text in the sidebar while placing orders in the main workspace. The sidebar can be hidden, resized, or opened as a separate window.

SmartLink

A SmartTool that pulls (or "links") information from the patient record directly into your documentation. For example, if you enter ".name", the patient's name is pulled in.

SmartLink/Phrase Butler

A window accessible from SmartTool-enabled fields from which you can search for and select SmartLinks and SmartPhrases. Click or enter ".?" to open the SmartLink/Phrase Butler.

SmartList

A SmartTool that allows you to choose from a list of pre-configured choices in a SmartText or SmartPhrase. Single-response lists are highlighted in yellow, while multiple-response lists are highlighted in teal.

SmartPhrase

A SmartTool that allows you to type a period followed by a few characters that automatically expand into a longer phrase or block of text. SmartPhrases can be as short as a single word or as long as an entire note template.

SmartSet

A documentation template comprising orders and other elements, such as notes, chief complaints, and levels of service, that are commonly used together to document a specific type of visit.

SmartText

A text template for charting that can include text, SmartLists, and SmartLinks. Frequently used in progress notes.

SmartTools

Charting shortcuts that you can use to pull different information into your documentation. SmartTools include SmartLinks, SmartLists, SmartPhrases, and SmartTexts. SmartTools can be used in any field with these buttons:

Staff message

A type of In Basket message you send to other users at your organization. In addition to the message's text, you can specify the priority of the message, the date it is sent, what action the recipient should take, and, if applicable, the patient your message concerns.

Workspace

A collection of one or more activities. A patient chart, Schedule, and In Basket are a few examples of workspaces. Select a workspace tab at the top of the screen to view that workspace.