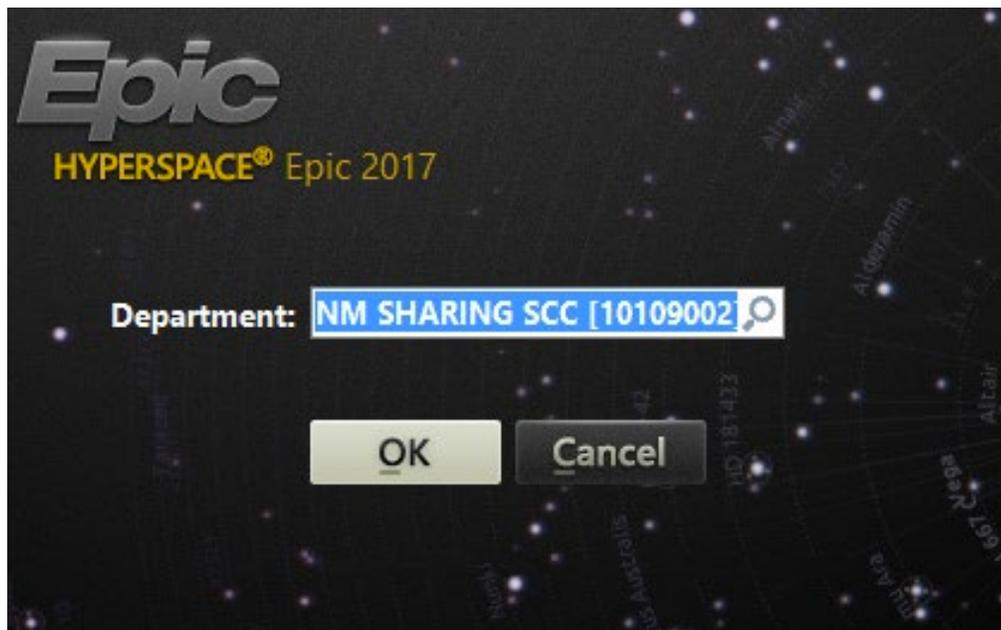


# SHARING Clinic Instructions for Students

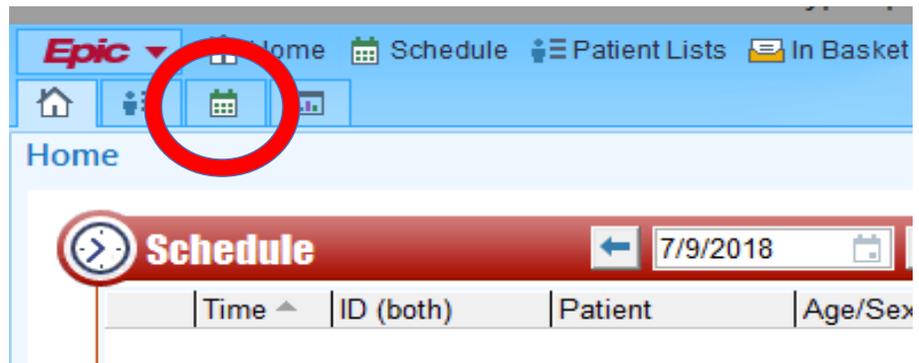
IT SUPPORT: 9-7700 (option 2 for EPIC)

## EPIC Access

1. If you did not complete the EPIC system training, you cannot login to the "Live/Production" version of EPIC.
2. If you did complete the training and you can't log into the live environment, call the IT support number above.
3. Log into the desktop using your UNMC Email and Password.
4. On the desktop of the computer, find the EPIC icon and double click to open. Use your username (Email ID **without** "@unmc.edu") and password to log in.
5. The SHARING clinic department name is NM SHARING SCC. You may search SHARING and find this department from the options that appear.



6. To open the SHARING Clinic Schedule, click the "Schedule" (calendar icon) located below the Epic button.



# Your Responsibilities as a Student

## Before Seeing the Patient

1. Find your patient in the SHARING schedule (see above) and review the patient's "Chart."
  - a. In the schedule, select (highlight) the patient and double click.
2. Select the "CHART REVIEW" folder on the left side of the screen.
  - a. Review the last SHARING progress note under the "Notes" tab in the Chart Review folder. You can also review lab results, imaging, meds, etc by selecting the appropriate tabs.
3. Based on your review of the patient, it may be appropriate to put in the orders for any labs before seeing the patient (for example, a continuity diabetic patient). When your patient arrives, the Clinic Administrator for the night will give you a packet of papers, one of which is the "Lab and POCT" form. If it's appropriate to order labs early, complete the form with the help of the attending physician (the form requires attending signature) and hand this to MLS (Medical Laboratory Science) staff. You may now get your patient from the waiting room, take vitals (nursing does this if they are at the clinic), and either direct them to MLS to have labs done or you can direct them to the patient room to interview the patient first (can complete the "Lab and POCT" form after seeing the patient if any orders are needed).

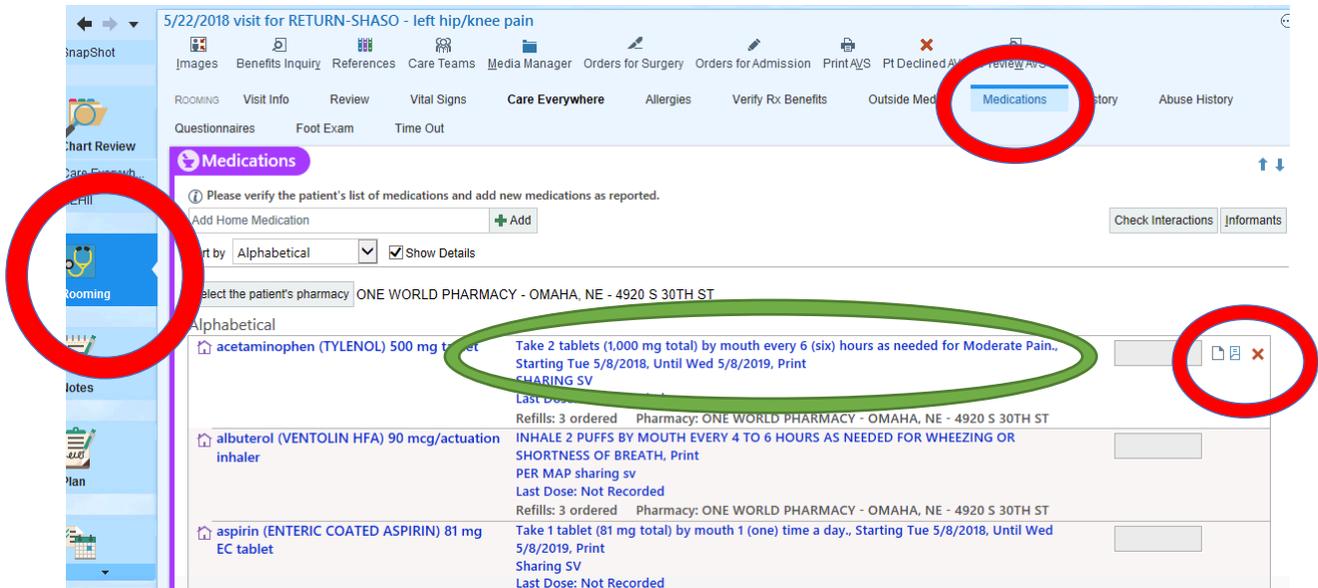
The screenshot shows the SHARING EHR interface. On the left sidebar, the 'Chart Review' folder icon is circled in red. At the top, the 'Notes' tab is also circled in red. Below the navigation bar, there are various filters and a table of lab results.

Attai	Date/Time	Test	Status	Normal/Abnl	Web Released	Pt. Viewed	Encounter Type	Department	Location
	04/11/2018 07:29	Extra heparin tube	Completed - Final...		N	N	Hospital Encounter	LABSS	Nebraska Me
	04/11/2018 07:29	TSH	Completed - Final...		Y	N	Hospital Encounter	LABSS	Nebraska Me
	04/11/2018 07:29	Comprehensive metabolic panel	Completed - Final...	Abnormal	Y	N	Hospital Encounter	LABSS	Nebraska Me
	09/19/2017 20:05	Lipid panel	Completed - Final...		Y	N	Hospital Encounter	LABSS	Nebraska Me

# Charting the Initial Encounter Once Patient Checks-In

(The following should be done after seeing the patient and taking the initial HPI)

1. If you didn't decide to order labs early, but would now like to order labs, now is the time to complete the "Lab and POCT" form with the help of the attending physician (the form requires attending signature) and hand this to MLS (Medical Laboratory Science) staff.  
**Do this first because it's important to get labs in ASAP.**
2. Now go into EPIC and enter Vital Signs (Nursing students are normally present to obtain vitals, otherwise student providers are responsible for this step)
  - a. To enter vitals: open the "Vital Signs" tab in the "ROOMING" folder.
3. Enter Results of PHQ2 (if applicable)
  - a. To enter results: click on the "more" tab in the bottom left corner and then select "flowsheets." In the search bar in the top right, search "PHQ2" and the questionnaire will show up. Enter the results and if patient meets criteria, the PHQ9 will show up. Be sure to do the PHQ9 with the patient when you go back to see them and come back here to fill out the results. If the PHQ9 score is high, consider consulting psych. **These results can be added to your note later by adding the smart phrase ".depressionscreen."**
4. Update the Medications
  - a. In the Rooming folder, click the "Medications" tab a few spots over from the "Vital Signs" (NOTE – this is different than the "meds & orders" tab in the "PLAN" folder because that is used for new medication and lab/imaging orders).
  - b. If you can't find the medication, select the "Database Lookup" tab and it should pop up.
  - c. Adjust the medication list to match the medications/doses the patient is currently taking. Pend for removal any meds that the patient is no longer taking or adjust doses (if patient is taking a medication differently). To pend a medication for removal, you must hover the mouse over the medication for the red X to appear. Click the "X" to remove the medication.



d. If the patient is taking the medication in a different way than listed, click on the dose instructions. (Green circle in the picture above). Document these adjustments by filling out the pop-up form that will come up (image below).

Accept Cancel

ⓘ If the patient is not taking this medication as prescribed, document the differences below.

Not Taking Reset to Prescribed Values 81 mg, Oral, Daily

Dose: 81 mg 81 mg 162 mg

Route: Oral Oral

Frequency: Daily Daily Once

Instructions: Click to add text

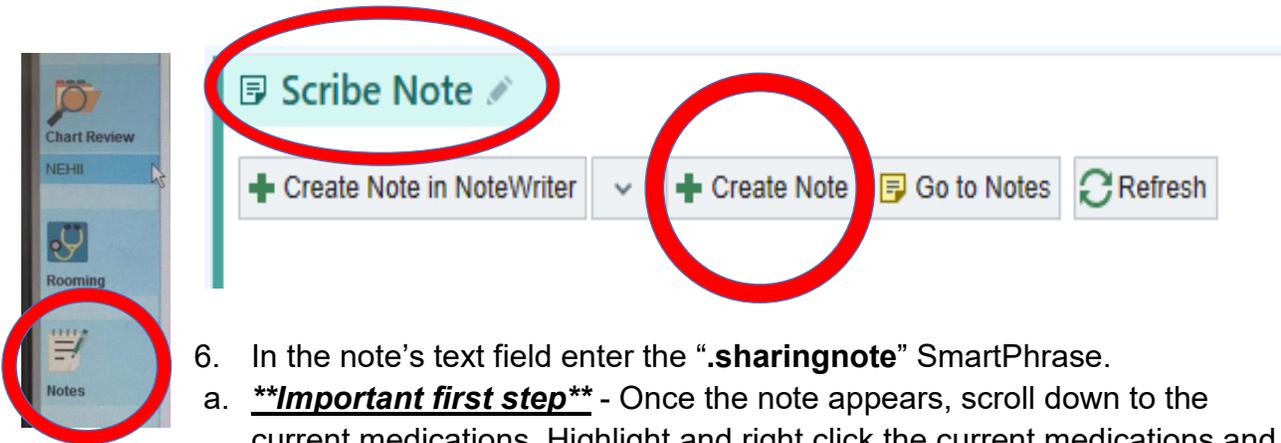
Indications:

<input type="checkbox"/> Blood Clot Prevention Following Percutaneous Coronary Intervention	<input type="checkbox"/> Inflammation of the Tendon	<input type="checkbox"/> Prevention for a Blood Clot going to the Brain
<input type="checkbox"/> Fever	<input type="checkbox"/> Joint Damage causing Pain and Loss of Function	<input type="checkbox"/> prevention of transient ischemic attack
<input type="checkbox"/> Head Pain	<input type="checkbox"/> Joint Inflammatory Disease in Children and Young Adults	<input type="checkbox"/> Rheumatic Fever
<input type="checkbox"/> Inflammation of the Covering of the Tendon	<input type="checkbox"/> Kawasaki Disease	<input type="checkbox"/> Rheumatoid Arthritis
<input type="checkbox"/> Inflammation of the Heart with Rheumatic Fever	<input type="checkbox"/> Myocardial Reinfarction Prevention	<input type="checkbox"/> treatment to prevent a heart attack
<input type="checkbox"/> Inflammation of the Lining of a Joint	<input type="checkbox"/> Pain	
<input type="checkbox"/> Inflammation of the Sac Surrounding the Joint - Bursitis	<input type="checkbox"/> Painful Periods	

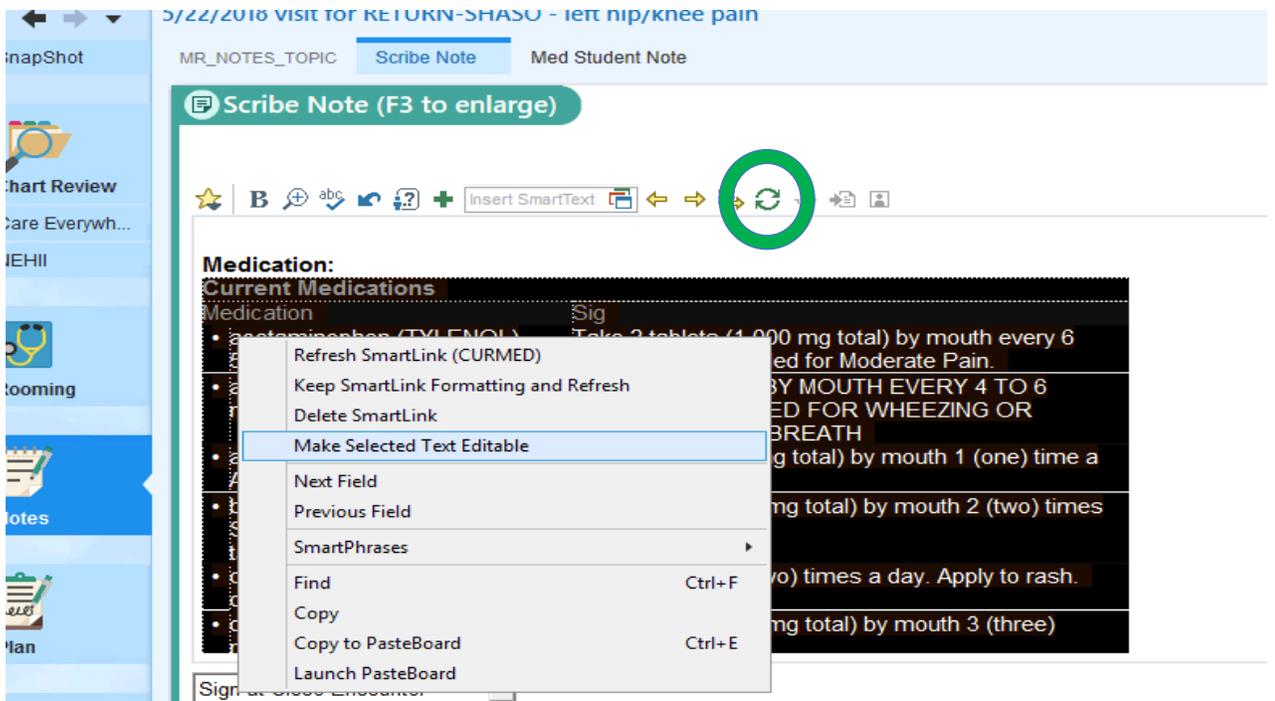
Indications (Free Text):

## 5. Start your note

- Once the med list is updated in the "ROOMING" folder, create a new note in the "NOTES" folder.
- Under Scribe Note, select "Create Note." Do **NOT** use "Med Student Note" or "Create Note in NoteWriter." (See image below)



6. In the note's text field enter the **".sharingnote"** SmartPhrase.
  - a. **\*\*Important first step\*\*** - Once the note appears, scroll down to the current medications. Highlight and right click the current medications and select "Make Selected Text Editable". (See image below) This step will remove the blue highlight for this section and **should be done after you have updated the patient's med list and before ordering new medications.** (See step 2 above) This will ensure the current medication list does not change when new orders are made.



7. You may leave the note and return at any time. Click the refresh button (green circle above) in order to update the note once additional changes are made in the "PLAN" folder. This will import changes to the note that were made in the "PLAN" folder without changing the medications from the HPI.

# Entering Visit Diagnoses, Meds & Orders

(Be sure to consult the attending provider prior to these steps. They will often see the patient with you before submitting orders and medications)

1. Enter/review "Visit Diagnoses" in the "PLAN" folder. Include any diagnoses discussed with the patient.
  - a. Look at their current problem list. If the diagnosis is on the problem list, click the green "resolve" arrow button (blue circle in the image below), which will add it to today's "Visit Diagnoses."
  - b. Acute new problems discussed during the visit can be entered under "Visit Diagnoses".
  - c. New chronic diagnoses (those that will not be resolved before the next visit) should be added to the "Problem List." These will also automatically show up in "Visit Diagnoses."

The screenshot displays the EPIC interface for managing patient diagnoses. The top section, titled "Visit Diagnoses" (circled in red), includes a search bar and a grid of diagnosis buttons such as "HIV disease", "Human immunodeficiency...", "HIV (human immunodeficiency...)", "Essential hypertension", "Osteomyelitis", "Chronic hepatitis C...", "Medication management...", "Human immunodeficiency...", "Medication monitoring...", and "Depression". Below this, it states "No visit diagnoses." The bottom section, titled "Problem List" (circled in red), features a search bar and a table of existing diagnoses. The table has columns for "Diagnosis", "Resolved", and "Visit". Under the "Cardiovascular and Mediastinum" category, "Hypertension" is listed with a "Change Dx" button and a "Resolve" button (circled in blue). Under the "Endocrine" category, "Type 2 diabetes mellitus with renal manifestations" is listed with a "Change Dx" button and a "Resolve" button.

2. Enter Labs on EPIC even though you already filled them out on the "Lab and POCT" form earlier
  - a. In the "PLAN" folder, go to "medications and orders" to search for labs/imaging you wish to order.
  - b. Each order must be associated with a visit diagnosis. You can now pend the order and the attending will sign it on their account.

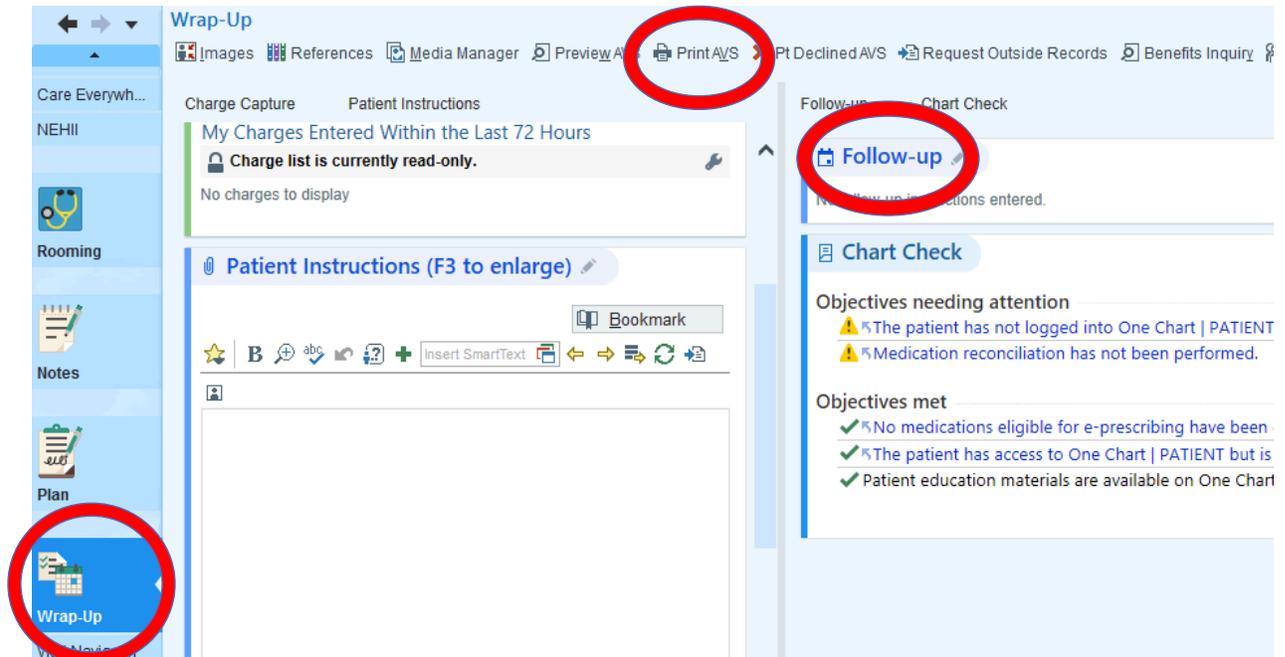
3. Enter new medication orders.
  - a. In the “PLAN” folder, go to “medications and orders” to search for new medications you wish to order.
  - b. NOTE – You can only “pend” ordered labs and medications (explained below). The attending provider will later sign orders through their EPIC account.
4. Enter medication refills.
  - c. If you click on the circular arrow next to the medication that the patient is currently taking, you get a “**reorder**” option that you can use to quickly prescribe refills.
    - i. Tip - anytime you see the red stop sign in an order field, it means it is NOT going to let you move forward with the order without filling in that blank.
  - d. For chronic, stable meds, prescriptions should be for 3 months
  - e. Be sure the supply of medications will last until the patient’s next appointment. Note that some months the next clinic will be in 5 weeks rather than 4 and so the patient will need 35 days of medication.
5. When you have completed your “Meds & Orders”, pend the orders, close the patient’s tab, **and tell the pharmacy administrator that you are ready for them to review your prescription orders.**
  - f. Pharmacy students will prepare prescriptions for eprescribing to OneWorld Pharmacy (30<sup>th</sup> and “L” Street).
6. When pharmacy is done reviewing meds, have faculty log in, review selections, and sign orders.
  - g. Signing the orders will automatically send any electronic prescriptions to OneWorld Pharmacy and print out any prescriptions that cannot be eprescribed or will be dispensed in the clinic.
  - h. Have faculty sign printed prescriptions, if any.

**ALL ORDERS MUST BE SIGNED BY THE ATTENDING BEFORE PRINTING THE AFTER VISIT SUMMARY!**

# Completing the After Visit Summary (AVS)

(Do this before finishing your note so the patient can leave the clinic as early as possible)

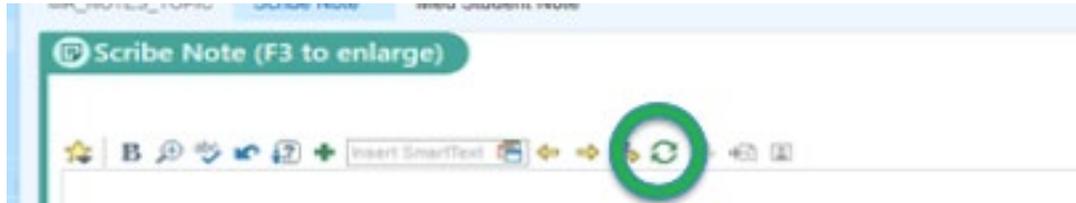
1. In the “WRAP-UP” Folder, enter the Follow-up date and add any Patient Instructions.
2. Hit the Print AVS (top menu) and hand this copy for the patient. (You may preview the AVS by selecting the “Preview AVS” tab.
3. You may now give the AVS to your patient and they can leave the clinic.



# Completing Your Note

(Instructions for starting your note are on page 4)

1. Since you already started your note, hit the green refresh button to load the Visit Dx & Orders into the note.



2. Work through the note using the F2 function.
3. Add additional dot phases to the note field as needed.
  - a. For example, enter ".PEMALE / .PEFEMALE" to the appropriate note section to add a physical exam SmartSet.
4. **All sections with \*\*\* and drop down menus need to be completed before the note can be signed and closed.**
5. Click "Accept" when done with Progress Note and you (the student provider) may now Log Out. However, you are NOT done, as you need faculty to sign off on your note. **Below are the steps faculty should take to finish the encounter (some might have their own unique way to do this and that is fine).**
6. Faculty will Log In to their EPIC account
7. Faculty will find the correct patient, find the medical student's note, and enter ".MEDSTUDENT" at end of note, which will look like the following:

I personally interviewed and examined (patient's name) and participated in the key facets of the medical decision making. I discussed the case with the medical student and the note reflects our joint efforts.

8. Then faculty should enter ".SIG" to sign the note themselves
9. Faculty will go to the "WRAP-UP" folder and enter the Level of Service. They should also put a "no charge" modifier.
10. **VERY IMPORTANT LAST STEP!** Finally, faculty will go to the clinic patient schedule page, highlight the correct patient, right click, and select "change provider to me". Then faculty can sign visit and close encounter.

**YOU ARE NOW DONE! THANK YOU SO MUCH FOR YOUR TIME AND EFFORT!**