

What you need to know about Epic Notes & Routing Options.

A new process is in place to support medical staff
with routing of Epic composed notes.



*This table illustrates the “**standard delivery rules**” of dictated and Epic composed notes.
Distribution occurs from St. Francis to the MD office via IHIE.*

	Dictation / Transcription	Epic Self-Authored Notes	Hospital Discharge Report
Delivery to the following:	All Patients	Inpatient, Emergency, and Outpatient	Inpatients Only
Dictating/Author	YES	YES	
Primary Care Provider	YES	YES	YES
Attending Provider			YES
Admitting Provider			YES
Ordering Doctor			
Consulting Provider			
Copy to:	YES	See the following slides for education on how to CC a self-authored note.	
	<u>Transcription Types:</u> <ul style="list-style-type: none"> • History & Physical • Discharge Summary • Operative Note • ED Dictation • Consultation • Sleep Study • Pulmonary Function Study • Crisis Note • Radiation Therapy Note • EMG • EG • Endoscopy • Cardiac Catherization 	<u>Self-Authored Notes:</u> <ul style="list-style-type: none"> • History & Physical • Discharge Summary • Operative Note • ED Provider Note • Consultations 	<u>Hospital Discharge Report:</u> A version of the patient’s After Visit Summary (patient instructions). <u>Includes the following information:</u> <ul style="list-style-type: none"> • Patient Name • Admission information • Allergies • Admission orders • Medical Problems • Hospital problem list • Discharge Medications

Steps to carbon copy another recipient when composing a note in Epic. (it is not necessary to cc: yourself or the patient's PCP)

Step 1:

1. Go to Notes Activity tab and compose a note.
2. At the bottom of the note, add **CC:** and the name of the desired recipient(s).
Recipient options include: individual physicians, a facility, or a physician group.
3. When the note is completed, sign off by clicking the Accept icon.

The screenshot shows the Epic Notes interface. On the left is a sidebar with navigation options: Patient Summary, Chart Review, Results Review, Synopsis, Intake/Output, Problem List, History, Notes (highlighted), Rounding, Order Entry, Order Review, Admission, Transfer, Discharge, and Admit. The main window is titled 'Notes - Viewing all notes' and shows a new note being composed for 'Consult, Anita - New Note by INPATIENT, ATTENDING PHYSICIAN'. The note header includes 'Type: H&P', 'Service: [blank]', 'Date: 11/29/2011', and 'Time: 1034'. The note body contains the following text: 'ECG: {Findings; diagnostics ecg reading:31282}.', 'Data Review{icu labs:18171}', 'Assessment:', 'Patient Active Hospital Problem List:', '*Racing heart beat', 'High blood cholesterol level', 'Plan:', and 'CC: Dr. David Mandelbaum, The Waters Extended Care Facility, Indiana Heart Physicians'. At the bottom of the note, there are three buttons: 'Copy Prev', 'Pend', and 'Accept' (highlighted with a red circle and the number 3). A yellow callout box with a red arrow points to the 'Notes' tab in the sidebar, containing the text: 'Important! Don't forget to add CC: and recipient(s)'. A red circle with the number 1 points to the 'Notes' tab, and a red circle with the number 2 points to the 'CC:' field.

1. Notes

Important! Don't forget to add CC: and recipient(s)

2. CC: Dr. David Mandelbaum
The Waters Extended Care Facility
Indiana Heart Physicians

3. Accept

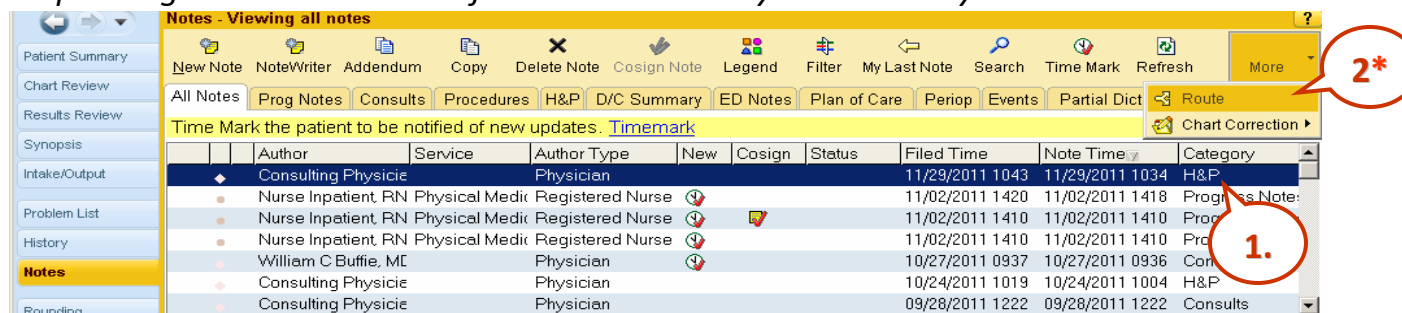
Next, route the desired note(s) to Health Information Management (HIM) for delivery.

Step 2:

1. Highlight in navy blue the desired note(s) to be routed.
2. Click on the Route icon located on the notes toolbar.



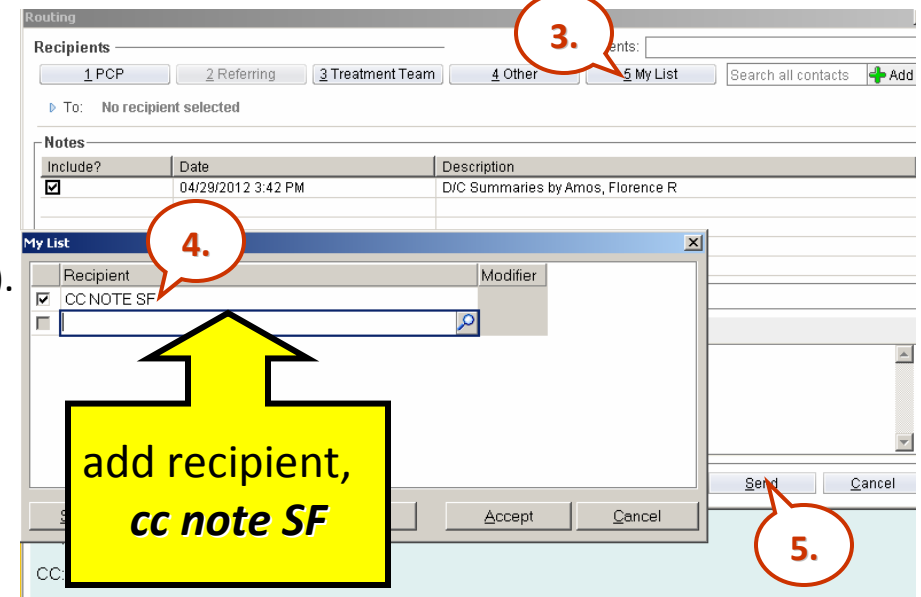
**Depending on the resolution of the monitor it may be necessary to click the MORE icon to access Route.*



The screenshot shows the "Notes - Viewing all notes" window. The toolbar at the top includes buttons for "New Note", "NoteWriter", "Addendum", "Copy", "Delete Note", "Cosign Note", "Legend", "Filter", "My Last Note", "Search", "Time Mark", "Refresh", and a "More" button. The "More" button is circled in red with a "2*" callout. Below the toolbar, there are tabs for "All Notes", "Prog Notes", "Consults", "Procedures", "H&P", "D/C Summary", "ED Notes", "Plan of Care", "Periop", "Events", "Partial Dict", and "Route". The "Route" button is circled in red with a "1." callout. The main area displays a table of notes with columns: Author, Service, Author Type, New, Cosign, Status, Filed Time, Note Time, and Category. The first row is highlighted in navy blue.

Author	Service	Author Type	New	Cosign	Status	Filed Time	Note Time	Category
Consulting Physicist		Physician				11/29/2011 1043	11/29/2011 1034	H&P
Nurse Inpatient, RN Physical Medir		Registered Nurse				11/02/2011 1420	11/02/2011 1418	Progress Note
Nurse Inpatient, RN Physical Medir		Registered Nurse				11/02/2011 1410	11/02/2011 1410	Progress Note
Nurse Inpatient, RN Physical Medir		Registered Nurse				11/02/2011 1410	11/02/2011 1410	Progress Note
William C Buffie, MD		Physician				10/27/2011 0937	10/27/2011 0936	Consult
Consulting Physicist		Physician				10/24/2011 1019	10/24/2011 1004	H&P
Consulting Physicist		Physician				09/28/2011 1222	09/28/2011 1222	Consults

3. Click **My List**,
4. Enter **cc note SF** and click Add icon.
4. Click the Send icon to route the desired note to Medical Records for delivery to the cc recipient(s).



The screenshot shows the "Routing" window. The "Recipients" section has tabs for "1 PCP", "2 Referring", "3 Treatment Team", "4 Other", and "5 My List". The "5 My List" tab is selected and circled in red with a "3." callout. Below the tabs, there is a "Notes" section with a table showing "Include?", "Date", and "Description". The first row is checked and shows "04/29/2012 3:42 PM" and "D/C Summaries by Amos, Florence R". Below the "Notes" section, there is a "My List" section with a table showing "Recipient" and "Modifier". The first row is checked and shows "CCNOTE SF". A yellow callout box with an arrow points to this row, containing the text "add recipient, cc note SF". At the bottom right, there are "Send" and "Cancel" buttons. The "Send" button is circled in red with a "5." callout.

Recipient	Modifier
CCNOTE SF	

Q: Why manually route a note to the Health Information Management department?

Answers:

1. You want to mail a note to another provider that would not receive the note by our standard delivery rules. (see slide #2)
2. Because Epic does not currently have the functionality to auto route notes to other providers besides the author and primary care provider.

Please note: This is an interim solution. Health Information Management (HIM) is in the process of validating all fax numbers and mailing addresses. This should improve routing options in the future.

Q: Can I route any note type to Health Information Management (HIM) for mail delivery?

Answer:

No, this process is only designed for these five note types.

1. History & Physical
2. Consultation
3. Discharge Summary
4. ED Provider Note
5. Operative Note

Q: Can I route a note to a physician directly by marking mail or fax?

Answer:

No, not at this time. Currently the options to manually route via mail and fax are turned off and should not be used. The fax numbers and addresses of all providers are currently being validated.

In the meantime, please designate the carbon copy recipients within the completed note. Then, manually route the note to our HIM department for delivery by mail.

More Information

- If you have questions about Indiana Health Information Exchange (IHIE) or your Docs4Docs subscription at your office please call or email the IHIE help desk.
 - Phone: 317-644-1752
 - Email: helpdesk@ihie.org
- If you have questions about how to route an Epic composed note to our HIM department or need assistance with Epic workflow please contact Florie Amos at 782-6917 or email at florence.amos@franciscanalliance.org
- Additional questions or request for help may be submitted to the St. Francis help desk at 317-783-8787.