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.

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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.**	
	Transcription Types: • History & Physical • Discharge Summary • Operative Note • ED Dictation • Consultation • Sleep Study • Pulmonary Function Study • Crisis Note • Radiation Therapy Note • EMG • EG • Endoscopy • Cardiac Catherization	**Self-Authored Notes:** • History & Physical • Discharge Summary • Operative Note • ED Provider Note • Consultations	**Hospital Discharge Report:** A version of the patient's After Visit Summary (patient instructions). **Includes the following information:** • 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.

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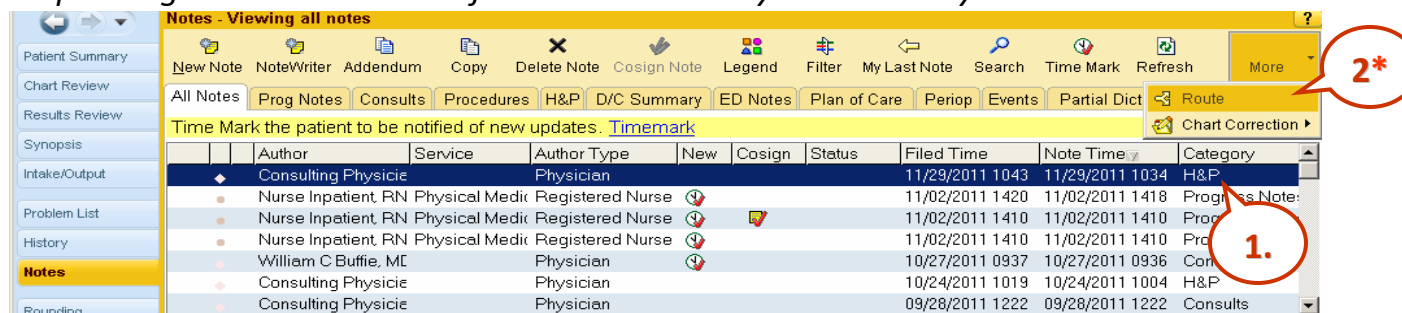**Don't forget to add CC: and recipient(s)**

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.
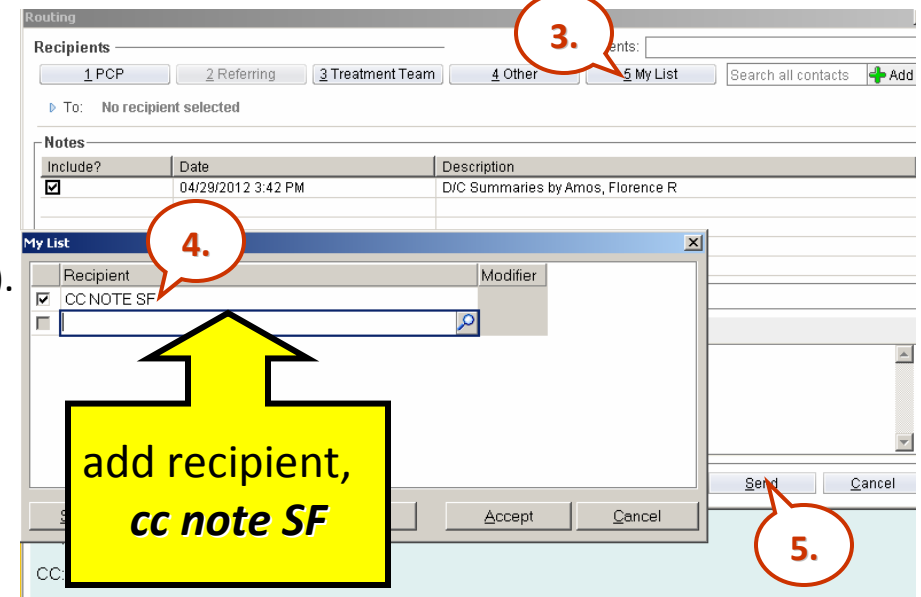2. Click on the Route icon located on the notes toolbar.

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

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).

add recipient, **cc note 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.

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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

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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.

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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.

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