# **EpicCare Link - Patient Chart**

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## **Accessing the Patient Chart**

## Select your patient's chart from a list of current patients

- 1. Click Patient and go to the My Patients tab.
  - If you have access to many patients, your patients might appear on more than one page. Use the field at the top of the page to search for patients by their name.
- 2. Click a patient's name to open their chart.

n n Bas	i 🧿 😃 ket Patient List	Referral Search	Upcoming	Appts - My	Patient	
SnapShot	Chart Review	Care Every	where	Results Review	Flowsheets	Prob
Patient Se	earch					
				<b>8</b>	earch My Patients	
		Name (	or MRN			
2 My Patients	Recen <u>t</u>					
Patient Name			MRN	ID Type	Sex	Birth D

3. To view a list of currently admitted patients, click **Patient List** and select the tab for admitted patients. For patients to appear on this list, you must have a provider relationship of PCP, attending, admitting, or treatment team on the admission.



4. Select a patient's name to view additional patient-specific information in the report pane.



## Search for a patient's record based on name or MRN

- 1. Click **Patient** and enter the patient's name or MRN.
- 2. In the Search Results window, click the name of the patient whose chart you want to open.

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In two clicks, you can quickly open a patient chart that you recently had open. In the **Search My Patients** section of the Patient Search activity, select the **Recent** tab and then click the name of the patient.

## What if I can't find a patient?

If you don't find a patient using the methods above, you might not have been granted access to their chart yet, or they might not have a record in the system. Use the **Search All Patients** section of the Patient Search activity when you need to gain immediate access to a patient's chart for the first time, such as in the case of an emergency. Note that you must enter the patient's first and last name when using this method.

- 1. If your initial search returns no results, click **Search All Patients** from the Search Results window.
- 2. Complete all of the required fields, and then click P Search.

	Search My Patients	Search All Patients 🌣	
Please fill out the req Doe,John).	uired fields to gain access to a patient/memi	per. Enter the full name as LastName,FirstName (example:	
Patient Select	•	Sex	0
Birth Date	9 9 <sup>†</sup>	8	ç

3. Select the patient record you want to open, select the reason you need access to the patient's chart in the **Reason** field, and add any comments. Enter any additional comments and click **</ Accept**.



If the patient's record doesn't exist, you can create one in EpicCare Link by clicking **Create a New Chart** in the Patient Search activity.

## Remove a patient from your patient list

You can remove a patient from your list if you no longer need access to them. For example, you might remove a patient from your list if the patient moves away.

1. From the list of patients, hover over the patient you want to remove and click X.

M	y Patients Recen <u>t</u>	<u> </u>	
	Patient Name	MRN	SSN
#	Sector of Sector		xxx-xx-0000
A	100.000		xxx-xx-7878

2. Review the information in the window that appears to confirm that you want to remove the patient, then click **Remove Patient**.

Re	emove Patient		×
	<sup>①</sup> You Are Removing a Patient From a Shared Patient List	≽	
	If you remove this patient, they will no longer be available for you or your colleagues. Removing patients cannot be undone, although you may be able to search for them again.		
	Abx, Test A - 5469875462		
	Select the patient groups to remove the patient from:		
	✓ <u>R</u> emove Patient X ⊆	ancel	

## **Monitoring Your Patients**

Event Monitor allows you to monitor events that occur in your patients' care, such as inpatient admissions or discharges, outpatient visits, or new lab results. You can view these events on the home screen or in your In Basket.

### Target your event notifications

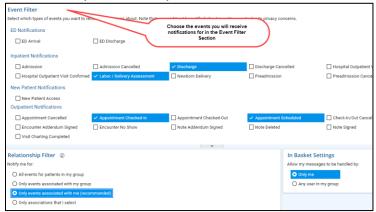
To focus on the medical events that matter most to you, use event and relationship filters in Event Monitor. You can tailor which types of events you're notified of and for which patients. For example, you can choose to be notified of only the events associated with you or certain providers in your group. You're associated with an event if you're the attending provider, admitting provider, referring provider, a treatment team member, a care team member, or the patient's PCP.

#### 1. Go to Menu > Settings > Event Settings.



- 2. Choose which types of events you'll receive notifications for in the Event Filter section.
- 3. Choose which events you'll receive notifications for by selecting one of the options in the Relationship Filtering section:
  - a. All events for patients in my group. This option includes events for any patient that you have access to. For example, if you choose to receive referral notifications, you are notified of any authorized referrals, even if the referral isn't to you or your group.
  - b. **Only events associated with my group.** For example, if a patient you have access to is admitted to the hospital, and the patient's PCP is in your group, you receive a notification even if the PCP isn't associated with the admission.
  - c. Only events associated with me (recommended).
  - d. **Only associations that I select**. This option includes only events associated with the relationships you select.
- 4. Choose who your notifications are sent to in the In Basket Settings section:
  - a. **Any user in my group**. Your notifications are sent to a group of users at your organization, and any of the users can access the message and mark it as Done, which removes it from the In Baskets of all the users in the group. This option helps reduce the risk of duplicate follow-up and can save time.

b. **Only me**. You are the only user who can mark the notifications as Done. Other users might still see and act on the same notifications, but they can't mark the message as Done. This option helps ensure that you see every notification.



### View a patient's recent events

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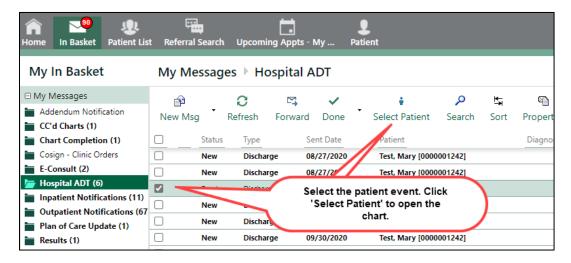
Select the **Home** tab and hover over each type of event in the Event Monitor section to review recent events for your patients.

If necessary, you can view more information about events and mark them as Done in In Basket by clicking the name of the patient in the Patient column.

For more information on In Basket, refer to In Basket: Viewing Messages.

### Open a patient's chart from an event message

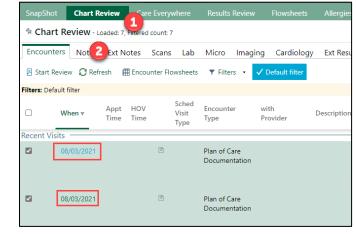
Select the In Basket message for the patient's event and click 🟺 Select Patient to open the patient's chart.



## **Reviewing the Patient Chart**

### Review the patient's chart before a visit

- 1. Open the patient's chart, click **Chart Review**, and select a tab that includes information you want to review.
- 2. To view more detail, such as a specific patient visit, click the date link that appears in the row.



To view details on several rows at once, select the check boxes in those rows, and then click **Start Review**.

	Encounters	Notes	Ext No	tes So	ans	Lab	Micro I
$\bigcirc$	E Start Review	v 📿 Refre	esh 🌐	Encount	er Flow	sheets	▼ Filters
	Filters: Default f	lter					
	wr	ien 🔻	Appt Time	HOV Time	V	ched ïsit ype	Encounter Type

- 3. To send a message to the patient's PCP regarding an office visit, open the specific encounter you would like to send the message for.
  - a. Click the **Order Date** hyperlink to open the encounter report.

🕸 Cha	Chart Review - Loaded: 2, Filtered count: 2									
Encou	nters Notes	Ext No	otes	Scans	Lab	Micro	Imaging	Cardiology Ext	Results	Proced
🗏 Start	🗏 Start Review 📿 Refresh IIII Encounter Flowsheets 🔻 Filters 👻 🗸 Default filter									
Filters: D	efault filter									
	When 🔻	Appt Time	HOV Time		Sched Visit Type	Encounter Type	r with Provider	Description	n Dept	Pt (
Recent \	/isits									
	08/02/2021	2				Orders Only	Luria, Scott, MD		BURL ADULT PRIM CARE	

#### b. Click Ask a Question to open the Encounter Question window

Chart Review - Encour		
	⑦ Do you have a question about this report?	Ask a Question
Blanca, Casa		MRN:
Orders Only 8/2/2021	Provider: I	
Status: Open		
UVM Medical Center Adult Pri	imary Care -	
Burlington		

c. Fill out the message form, and click **Send**.

counter Question			KA (
То		t High Priority	Low Priority
Recipient	Relationship	Encounter Info Casa Blanca	
Heath, Lincoln, MD  Luria, Scott, MD	PCP Encounter Provider	Orders Only Luria, Scott, MD	8/2/2021 Burl Adult Prim Care
bject		Contact Preferen	nces
🕘 🖕 🛃 Insert SmartText 📑 🖨	⇒ 🐇 🛼 100% 👻	Phone Number	Call <u>M</u> e
D This message will not be saved to the patien	's chart.		
			🚿 <u>S</u> end 💙

### Find information quickly in the patient's chart

For patients with large charts, you can enter text in the **Search Chart** field to quickly find the information you need. For example, search for "cholesterol" to see a list of relevant matches in the patient's chart, such as lipid panel results and progress notes that mention cholesterol.

	SnapShot	Chart Review	Care Every
HA	🛠 Chart R	Review - Loaded: 8	
	Encounters	Notes Ext N	otes Scans
Hpdemotwo Adt Female	🗏 Start Revie	ew 🤁 Refresh  🗄	Encounter Flc
Female, 73 y.o., 1/1/1948 MRN: 0000005701 CSN: None	• •	/hen ▼ Appt Time	HOV Time
	Recent Visits		
Cholesterol 🔎		8/03/2021	Ē
Cholesterol Pt Type: None COVID-19 Vaccine: Unknown			

### Use filters to narrow the list of information you see

You can also use filters to find visits, labs, medications, or other information in Chart Review. For example, on the **Encounters** tab, you can filter the list so you see only the visits associated with certain providers.

- 1. In Chart Review, select a tab.
- Click **T**Filters and select a filter type. Then, select check boxes next to the values that you want to see.
  For example, select Encounter Type, and then select the Hospital Encounter filter.
- 3. Click **Apply** to make the results of your search appear.

☆ Chart Review - Encounters ▷ Filters						<b>† (</b> )
Clear All						
🗁 Filters		Encounter Type 🔺		#Enc	Last Date	
Appointment Status		Hospital Encounter		2	07/21/2021	
Attachment Type						
-						
					✓ Apply 🗙 C	Cancel

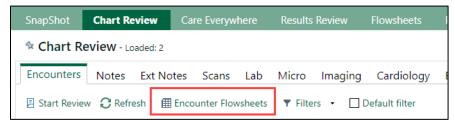
To remove the search criteria and begin a new search, click ᆇ Clear All.

## View trending data in graph or table format in Chart Review

- 1. In Chart Review, select the check box for the data you want to view. For example, select specific visits or lab tests.
- 2. Select the type of flowsheet that you want to create.

lacksquare

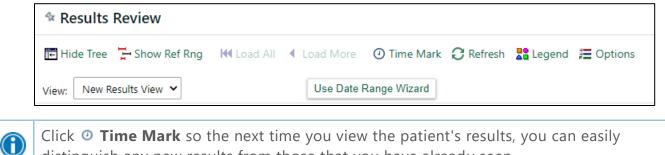
- Click Encounter Flowsheets to graph data such as vital signs or medications. Then select a specific flowsheet, such as Diabetes Brief.
- Click Lab Flowsheets to graph lab result data.



- 3. Click and drag to select the table cells that contain data that you want to graph.
- 4. Click 🖾 Line Graph or 🛄 Bar Graph to create a graph of the selected data.

## View a patient's trending lab results in Results Review

- 1. Select the Patient tab and click Results Review.
- 2. Select the date range for the results data you want to see and click **Accept**.
- 3. To view a specific result component type, such as Hematology, or a specific result component, such as Hemoglobin, expand the tree on the left. Select the name of the component or component type that you want to view.
- 4. To view more columns of results, click < Load More. To view all columns of a patient's results for the time range that you selected, click < Load All.



Click **O Time Mark** so the next time you view the patient's results, you can easily distinguish any new results from those that you have already seen.

### Customize the way results appear

- 1. In Results Review, click **E Options**.
- 2. To make the most recent results appear from left to right by default, select the Trend Dates in reverse chronological order check box.
- 3. Set your other default preferences, such as the default number of columns to show, using the other options.
- 4. Click **</** Accept.

☆ Results Review	
E Show Tree Show Ref Rng	d All 🖪 Load More 💿 Time Mark 🤤 Refresh 🔡 Legend 🗮 Options
View: Extended View 💙	Use Date Range Wizard
There is no result data for this patient.	🚥 https://epiceclinkdirecttest.uvmhealth.org/epiccarelink-poc/epiccare/rr – 🛛 🗙
	https://epiceclinkdirecttest.uvmhealth.org/epiccarelink-poc/epiccare/rr_optio
	Results Review Options
	Reset to Defaults
	Default number of columns for Extended View: 5 🗸
	Number of columns per row when printing: 5 💙
	Trend Dates in reverse chronological order
	Show time in Extended View
	Show date range wizard before starting Results Review
	Start with date range filter enabled
	Show grid lines
	✓ Accept X Cancel

## View a patient's allergies

Select the Patient tab and click Allergies.



### View a list of the patient's current medical problems

Select the Patient tab and click Problem List.



For more information about a problem, click the View Report link.

### View a patient's current medications

Select the Patient tab and click Medications.

For more information about a medication, click **View Details**.

## View a patient's history

Select the **Patient** tab and click **Histories** to see a report with information about the patient's medical, surgical, family, and social history. Social history includes topics like tobacco use and sexual activity.



For a high-level summary of the current patient's chart, select **SnapShot** from the Clinical Review menu.

## View a patient's demographics

Select the **Patient** tab and click **Demographics** to see a report with demographic information like the patient's address, PCP, emergency contacts, and more.

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