

EPICATONIA

Brown Bagging it with Epic

Documenting Phone Calls and Rx Renewal Requests in Epic

April 10, 2009

Questions: email epic@healthcare.uiowa.edu



How do I document a telephone call?

When a patient calls for medical advice or to refill a prescription over the phone or received by fax from a pharmacy document the call in a telephone or refill encounter.

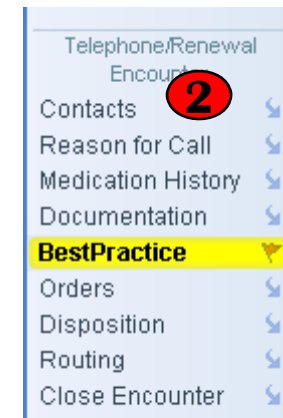
1. Click on the Tel Enc button on the main toolbar to create one.



Where do I record who is calling?

You can record who is making the call in the Contacts section of the navigator

2. Click the Contacts section in the navigator. The Contact Information window appears.





IPR Contact Types:

Phone

Fax

Email

In-Person

Other

In Epic use the Contact comments field to indicate the Contact Type.

3. Enter relevant information, including the name of the person calling and from what phone number. Click Accept.

Contact Information

Date: 4/9/2009 Time: 04:00 PM

Type: Incoming **Incoming** Outgoing

Relation: Self Self Mother

Contact: Master, Owen Father 1: Mattie

Emergency 2 Guardian

Phone: Pharmacy

H: 319-384-7007 W: 319-384-7008

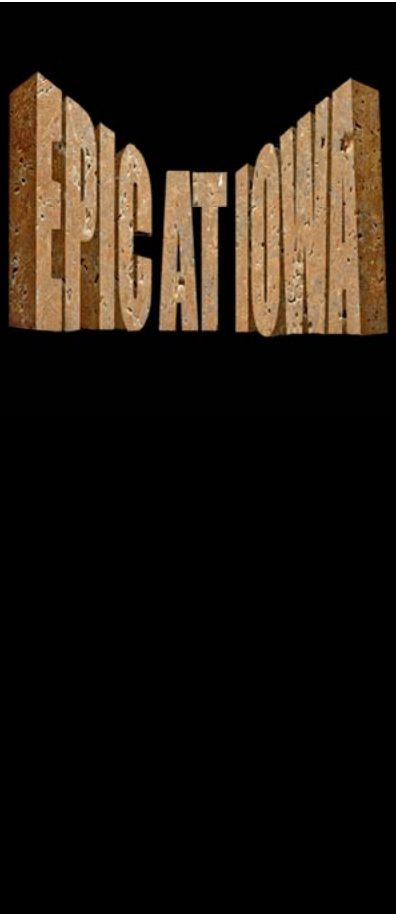
L: 319-356-0001 Other

Contact comments:

Permanent comments: **DON'T USE THIS - This is if a pharmacy is calling and does not have Iowa Pharmacies**

3 Accept Cancel

You can record both incoming and outgoing calls in the Contacts section of the navigator. Click Incoming or Outgoing to specify whether the call is incoming or outgoing.



Where do I record the reason for call?

If you are documenting a renewal encounter, type 'Med Ref' to bring in Medication Refill as the reason for call. The encounter changes to a Refill and it changes the routing to an Rx Request when routing to another staff member.

Steps to enter a different reason:

- Click Reason for Call in the navigator table of contents.
- Enter the first few letters of the reason for call that you want to document. Your Preference List Matches window appears.
- Select the reason for call and click Accept Selection.
- **The reasons for call are from database that HCIS manages with input from the end users.**

Reason for Call	Onset	Comment
Medications Refill	4/8/2009	

EDUCATION

How do I reorder a medication?

If the patient (parent, guardian, pharmacy, etc.) is calling for a medication refill, go to the Orders navigator section.

To reorder a medication that has been documented for the patient before, click the reorder button. The order is automatically set to **Pend** if you are not a LIP.

The screenshot displays the 'Orders' section of a medical software interface. On the left is a vertical navigation menu with the following items: Telephone/Renewal Encounter, Contacts, Reason for Call, Medication History, Documentation, BestPractice, **Orders** (highlighted in blue), Disposition, Routing, and Close Encounter. The main content area is titled 'Orders' and contains a section for 'Current Medications (3)'. This section lists three medications, each with a 'Reorder' button highlighted by a red box:

Medication	Dosage/Instructions
PREDNISONE tablet	take 5 mg by mouth daily., (12/16/06-)
TACROLIMUS capsule	take 5 mg by mouth 2 times daily., (12/16/06-)
PROZAC 10 mg	take 10 mg by mouth daily.

At the bottom of the interface, there is a 'New order:' input field, a 'Search' button, a 'Next' button, and links for 'Order Entry' and 'Diagnosis Entry'.



If these are patient-reported medications, Stop Signs will present. To resolve click the little box next to the 'X' to open the Order Composer.

The Approve and Refuse buttons are the LIPs use.



Medications (1) Rx ASC PHARMACY [Patient Preferred] ☎ None

Approve Refuse **Pend** predniSONE 5 mg tablet 📄 ✕

Sig: take 1 Tab by mouth daily.

Dose	Frequency	Dispense	Refill	Class	Start	End	Instructions
5 mg	DAILY	⚠️ ⚠️	⚠️	⚠️	4/8/09		

Approve All Refuse All Pend All

- Type in an end date (for example, m+6 for six months from now).
- The dispense and refill information will appear unless it is a patient-reported medication.
- Complete the 'Class' field. This tells Epic whether you'd like to E-prescribe the med to the pharmacy electronically, Phone In, or print the prescription.

Controlled medications cannot be e-prescribed. The prescription for controlled medications will print and still requires the LIP to manually sign.



From the order composer, you can complete the order and add the indication for use. If unknown, leave it blank and the LIP will need to add.

Y [Patient Preferred] 📞 None



Instructions

Pend All

Full Detail

predniSONE 5 mg tablet

Reference Links: 1. [UIHC Formulary](#) 2. [Micromedex](#)

Dose: 5 mg 5 mg

Prescribed Dose: 5 mg
Prescribed Amount: 1 Tab

Route: Oral Oral

Frequency: DAILY DAILY 2X/DAY

For: 183 Doses Days

Starting: 4/8/2009 Ending: 10/8/2009

Dispense: 30 Tab Refill: 6 Dispense As Written

Mark long-term: PREDNISONE

Instructions: [Click to add text](#)

Comments (F6): [Click to add text](#)
(300 char max.)

Indications:

<input type="checkbox"/> Acquired Thrombocytopenia	<input type="checkbox"/> Acute Lymphoid Leukemia	<input type="checkbox"/> Adrenal Cortical Insufficiency
<input type="checkbox"/> Adrenogenital Disorder	<input type="checkbox"/> Allergic Rhinitis	<input type="checkbox"/> Angioedema
<input type="checkbox"/> Ankylosing Spondylitis	<input type="checkbox"/> Asthma Exacerbation	<input type="checkbox"/> Atopic Dermatitis
<input type="checkbox"/> Autoimmune Disease	<input type="checkbox"/> Autoimmune Hemolytic Anemia	<input type="checkbox"/> Bell's Palsy

Accept Cancel



How do I select a Pharmacy?

It is important to select a pharmacy if one has not been identified for the patient. Click the pharmacy hyperlink. Pharmacies that are participating in e-prescribing are identified under the E-Pharm column.

Medications (1) No pharmacy selected

Approve Refuse **Pend** **predniSONE 5 mg tablet** ⓘ ✕

Sig: take 1 Tab by mouth daily for 183 days. Indications: Acquired Thrombocytopenia

Dose		Frequency	Dispense		Refill	Class	Start	End	Instructions
5	mg	DAILY	30	Tab	6	E-Prescribe	4/8/09	10/8/09	

Approve All
Refuse All
Pend All

Record Select

Search:

%	ID	E-Pharm?	Pharmacy	Address
	21431	Yes	HY-VEE #1068 800 N 2ND STREET CHEROKEE IA51012 712-225-6121	800 N 2ND STREET
	58912	Yes	HY-VEE PHARMACY CLINIC,WATERTOWN,SD 525 5TH STREET SE WATERTOWN SD57201 605-886-4207	525 5th Street SE
	32085	Yes	HY-VEE Pharmacy,Chillicothe,MO 1210 Washington Street Chillicothe MO64601 660-646-1280	1210 Washington Street
	58806	Yes	HY-VEE, 9TH, WATERTOWN, SD 1320 9TH AVENUE SE WATERTOWN SD57201 605-886-0661	1320 9th Avenue SE
	58872	Yes	HY-VEE, BROOKINGS, SD 790 22ND AVENUE SOUTH BROOKINGS SD57006 605-692-7311	790 22nd Avenue South
	56828	Yes	HY-VEE, E 10TH,SIOUX FALLS, SD 3020 EAST 10TH STREET SIOUX FALLS SD57103 605-336-8998	3020 East 10th Street
	58842	Yes	HY-VEE, VERMILLION, SD 525 WEST CHERRY STREET VERMILLION SD57069 605-624-9591	525 West Cherry Street
	58826	Yes	HY-VEE, YANKTON, SD 2100 NORTH BROADWAY YANKTON SD57078 605-665-8261	2100 North Broadway
	58820	Yes	HY-VEE,S MARION,SIOUX FALLS,SD 1900 SOUTH MARION ROAD SIOUX FALLS SD57106 605-361-3347	1900 South Marion Road
	58750	Yes	HY-VEE,S LOUISE,SIOUX FALLS,SD 4101 SOUTH LOUISE AVENUE SIOUX FALLS SD57106 605-361-1382	4101 South Louise Avenue
	58742	Yes	HY-VEE,SYCAMORE,SIOUX FALLS,SD 1601 SOUTH SYCAMORE ROAD SIOUX FALLS SD57110 605-334-1173	1601 South Sycamore Road
	21358	Yes	Hy-Vee Care #4013 3998 NW Urbandale Dr Urbandale IA503227922 515-278-0117	3998 NW Urbandale Dr
	19373	Yes	Hy-Vee Clinic Pharmacy, Cuba, IL 313 E. Jefferson Cuba IL61542 309-785-5029	313 E. Jefferson
	32518	Yes	Hy-Vee Clinic Phar.,Osage Beach,MO PO Box 556 Osage beach MO65065 573-348-2721	PO Box 556
	32166	Yes	Hy-Vee Clinic Pharmacy #1036 710 W Main St Princeton MO646731141 660-748-7730	710 W Main St
	21349	Yes	Hy-Vee Clinic Pharmacy, Marcus, IA 321 North Main Marcus IA51035 712-376-2844	321 North Main
	32388	Yes	Hy-Vee Clinic Pharmacy,Princeton,MO 710 Main Princeton MO64673 660-748-7730	710 Main
	21441	Yes	Hy-Vee Clinic, Bedels,Storm Lake,IA 409 West 5th St. Storm Lake IA50588 712-732-4819	409 West 5th St.
	19223	Yes	Hy-Vee Clinic, Galesburg ,IL 3315 N. Seminary, Suite 104 Galesburg IL61401 309-344-2020	3315 N. Seminary, Suite 10-



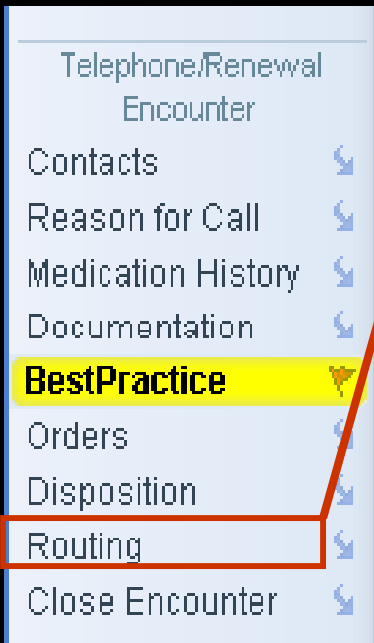
How do I route telephone call information?

Telephone and refill encounters can be routed to other staff members or groups using the Routing navigator section.

For example, you might route a refill request to the patient's PCP, who will respond with an Rx Response In Basket message. Their Rx Response message will indicate whether the prescription was approved or refused, and if a phone call to the pharmacy or notify the patient are needed.

Click **Routing** in the navigator table of contents.

Enter the names of the recipients in the Recipient field or send to a group of staff members (i.e. pool) by entering a 'p' followed by a space and the name of the pool. (i.e. p FCC) or select from your built list.



Resp	Recipient	Modifier
<input checked="" type="radio"/>	PETERSON, TOM	

Route as: Patient Calls Rx Request Rx Response

Priority: High Normal Low

Buttons: Route to Sender, Routing History, Send Fax, Add PCP, Add My List, Build My Lists, Clear All

Comment:

Faxes to send: 0

How does the LIP approve or refuse a refill request?

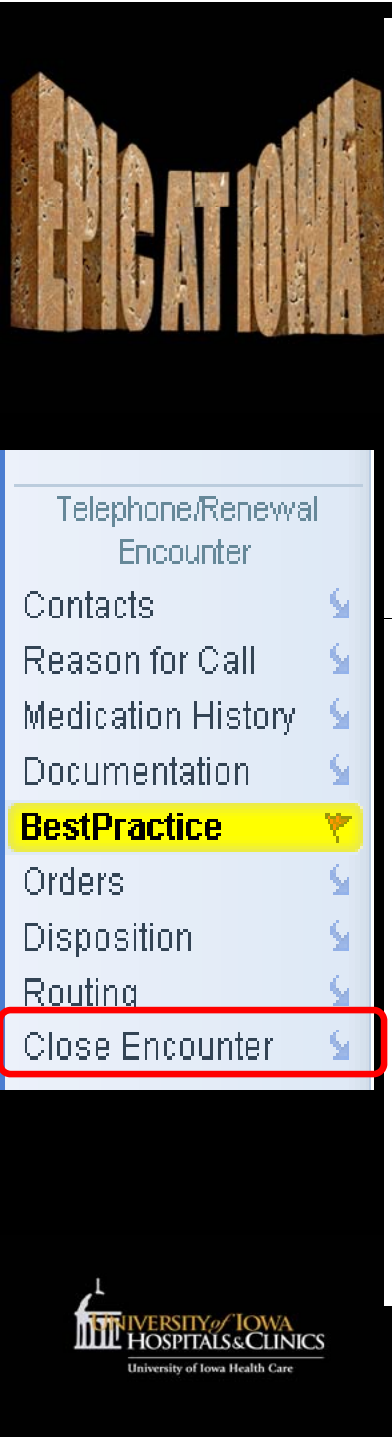
Once a nurse or clerk routes the telephone encounter request to the LIP, the LIP will receive an Rx Request message in their In Basket.

The screenshot shows a software interface with a left-hand navigation pane and a main content area. The navigation pane lists folders: 'Meghan Test Rose's In Bas', 'Rx Request (1)', 'Letters-Unsent', 'My Patient Calls (8)', 'Letters', and 'My Incomplete Notes (1)'. The main content area is titled 'Rx Request 1 unread, 1 total' and includes an 'AutoAdvance' checkbox and a 'Resize' button. Below this is a toolbar with icons for 'Selective Approve', 'Approve Rx', 'Refuse Rx', 'QuickNote', 'Enc', 'Review', and 'Flowsheet'. A table below the toolbar displays the details of the request:

P	Status	Encounter	Time	Patient	Contr...	Last Accessed	Pool	Sent By	Open?
	New	04/08/2009	3:52 PM	Testpatient, Path...		ROSE, MEGHA...		Rose, Megha...	Open

Rx Request

Why did I get it?	A patient has requested a prescription refill.
What can I do with it?	<ul style="list-style-type: none"> •View the encounter summary •Open the associated encounter •Approve or refuse the request by clicking Approve Rx or Refuse Rx •You can edit the prescription order by choosing Selective Approve •Review the patient's chart •Add a quick note to the encounter
How do I remove it?	Approve or refuse the request.
	<p>IF approved or refused without entering the encounter the message automatically route back to the sender.</p> <p>IF the encounter is opened by the staff member must manually route the message back to the sender.</p>



When do I close the encounter?

- The practice should be to close the encounter once all the documentation is completed by all staff members involved in the telephone encounter.
- Closing the encounter is the electronic equivalent of signing the paper chart.

Example:

After the LIP approves or refuses the Rx Request the Nurse (sender) receives an Rx Response message in their InBasket. The Nurse can document additional information i.e. informed the patient, local pharmacy notified.

The sender will have a My Open Encounters InBasket until the encounter is closed.

1. Select the Close Encounter section of the navigator.
2. If the encounter is missing required or recommended information, the Close Encounter activity appears, listing the information you need to complete.
3. After all information is complete, click Close Encounter again.

If closed in error, you will need to create an addendum. Note that the Close Encounter tickler in the InBasket is no longer present.

How do I set-up 'Build My Lists'?

Routing

Exit workspace to send In Basket messages and faxes.
The green ball with the ! icon denotes the responsible user or pool.
Click the Resp column to toggle responsibility.

Route as: Patient Call Rx Request Rx Response

Resp	Recipient	Modifier
	WALKER, KRISTY TEST	
	HAFNER, MICHAEL J	

Priority:
 High
 Normal
 Low

Route to Sender
Routing History
Send Fax

Add PCP Add My List **Build My Lists** Clear All

Comment:
abc Add From Multiple Lists ...
Routing Call Encounters

Restore Close F9

Build My Recipient Lists

You can build your recipient lists for different routing needs. Click on a different tab below to build the recipient list for that module.

Currently you are building the recipient list for routing Call Encounters.

Allow selection of individual recipients?

Charts Results **Call Enc** Letters Addenda CRM

Recipient	Modifier
WALKER, KRISTY TEST	
HAFNER, MICHAEL J	