

Firm Faculty Coaching Topic PGY1 #4

Create Quick Action- Result Release

1. Go to Inbasket. Find a Result to Release. Go through all steps to release result BUT click “Save as Quick Action” (a)
2. Create Quick Action for MyChart, Letter and Phone note results (b-e)
3. For future find Quick Actions within Inbasket (f)
4. Can also Manage Quick Actions within InBasket (g)

a. Create Result Note as described in coaching topic PGY1 #2 BUT click “Save as Quick Action” when done.

The screenshot shows the 'Result Note' section of the InBasket interface. A yellow arrow points to the 'Save as QuickAction' button. Below it, a list of results is shown, including 'COMPREHENSIVE METABOLIC PA...', 'LIPID PANEL [266859539]', and 'HCV C AB SCREEN WITH REFLEX...'. The 'Result Note' section is expanded, showing a 'Route' button and a 'To: P PCG LETTERS' field. A yellow arrow points to the 'Save as QuickAction' button.

b. Name Quick Action

c. Click “Mark as Done”

d. If Letter, chose PCG letters to forward to everytime

e. Change to generic @fname@ @lname@

The screenshot shows the 'Result Note QuickAction Editor' interface. A yellow arrow points to the 'Name' field, which contains 'MyChart Result'. Another yellow arrow points to the 'Mark message as done' checkbox. A third yellow arrow points to the 'Route To' field, which contains 'P PCG LETTERS'. A fourth yellow arrow points to the 'Dear @fname@ @lname@' field. A fifth yellow arrow points to the 'Dear @fname@ @lname@' field.

f. Find Quick Actions in Inbasket. (See Mychart, Letter and Phone note quick action options)

g. Can also “Manage Quick Actions” in Inbasket to create new Quick Actions

The screenshot shows the 'Manage QuickActions' dropdown menu in the InBasket interface. A yellow arrow points to the dropdown menu. The menu items are: '1 Mychart results', '2 Letter -result note', '3 Phone call results', '4 COVID-19 Work Note', and 'Manage QuickActions'. A yellow arrow points to the 'Manage QuickActions' item. Another yellow arrow points to the 'Manage QuickActions' dropdown menu.

Firm Faculty Coaching Topic PGY1 #4

Create Quick Action- Patient Message

1. Go to Inbasket. Click “New Patient Message” (a)
2. Write a patient message (b-d)
3. Create Quick Action Patient Message (e-g)
4. For future find New Patient Message Quick Actions within Inbasket (h)

The screenshot shows the Epic In Basket interface. At the top, the navigation bar includes 'Epic', 'Chart', 'Encounter', 'In Basket', 'Telephone Call', and 'Pt Out'. Below this, a secondary bar shows 'In Basket', 'New Msg', 'New Patient Msg', and 'Edit Pools'. A yellow arrow points to the 'New Patient Msg' dropdown menu, with a callout box 'a. In Inbasket, Click “New Patient Message”'. The main content area is titled 'Secure Patient' and contains a form for creating a quick action. The 'Button Name' field is set to 'MYCHART BLOOD PRESSURE'. A callout box 'e. Add Title to Quick Action' points to this field. The 'Subject' field contains 'Following up on your blood pressure'. A callout box 'f. Change to generic @fname@' points to the '@FNAME@ @LNAME@' placeholder in the 'Dear' field. The 'Dates' section shows 'Delay sending until' set to 7/26/2022. A callout box 'g. Update delay, Attachments, etc and “Accept” save Quick Action' points to the 'Accept' button. The 'Options' section has 'Send patient reply to me' checked. A callout box 'c. Chose whether to delay or allow patient to reply' points to this checkbox. The 'Tasks & Attachments' section lists 'General Questionnaire', 'Vital Flowsheet', and 'History Questionnaire'. A callout box 'd. Save as Quick Action' points to the 'Save as QuickAction' button at the bottom left. At the bottom right, a callout box 'h. Message Quick Actions available by clicking on arrow' points to a dropdown menu in the 'In Basket' section showing a list of messages, including '1 Call to schedule appointment', '2 MYCHART BLOOD PRESSURE', '3 MYCHART ER FOLLOW UP', and 'Create Patient Msg QuickAction'.

The screenshot shows the Epic Patient Message interface. The 'To' field is set to 'AmbulatoryIII CBIS Test'. The 'Regarding' field is 'AmbulatoryIII CBIS Test'. The 'Subject' field is 'High Blood Pressure'. A callout box 'b. Chose patient. Write text.' points to the 'To' field. The message body contains the text: 'Dear AmbulatoryIII CBIS Test, This message is to follow up on your high blood pressure in clinic. Please check your blood pressure a few times per week and send me the result in a note or in the attached flowsheet. If you need further instruction, please call the clinic at 773-702-6840, Julie L Oyler, M.D.' A callout box 'c. Chose whether to delay or allow patient to reply' points to the 'Send patient reply to me' checkbox. A callout box 'd. Save as Quick Action' points to the 'Save as QuickAction' button at the bottom left. The 'Dates' section shows 'Delay sending until' set to 7/26/2022. The 'Reply' section has 'Send patient reply to me' checked. The 'Tasks & Attachments' section lists 'Attachment', 'General Questionnaire', and 'History Questionnaire'.