

Firm Faculty Coaching Topic PGY1 #2

Result Note/Release lab to patient in MyChart or Send Letter

1. Go to Inbasket in EPIC. Select a result. Does patient have MyChart? Click Result Note (a-c)
2. Send Letter for normal results in patient WITHOUT MyChart (d-i)
3. Send MyChart Message for normal result for patient WITH MyChart (j-o)



a. Patient without MyChart



b. Patient with MyChart

c. Click Result Note

d. Patient without MyChart

e. Click Lab names so note shows up attached to Lab

f. Click Route and chose PCG letter pool (use magnifying glass)

g. Write note to patient

h. Click Also File as Note to put note in Notes section

i. Leave MyChart section blank since patient does not have MyChart

Component	Ref Range & Units	1 d ago (6/30/22)	6 mo ago (12/26/21)	10 mo ago (9/2/21)	1 yr ago (4/15/21)	1 yr ago (4/15/21)
Glucose, Ser/Plasma	60 - 99 mg/dL	75	104 [▲]	72 [○]	88 [○]	74
Comment: Reference range for fasting plasma glucose only.						
Sodium	135 - 145 mmol/L	144	142	142	139	142
Potassium, Ser/Plasma	3.5 - 5.0 mmol/L	4.3	4.2 [○]	4.4	4.2	4.3

j. Patient with MyChart

k. Click Lab names so note shows up attached to Lab

l. Leave Route empty, unless you want to notify PCP or attending

m. Write note to patient

n. Click Also File as Note to put note in Notes section

o. Click Copy from Result Note to send same note to patient in MyChart

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Telephone Note

- a. Click on Telephone Call, find patient using MRN
- b. Need to enter Contact information, Reason for call

1. Open Telephone encounter and note (a – c)
2. Residents should use either faculty coach or faculty this patient was staffed with for orders in between visits (d)
3. Residents can sign telephone encounters, no need for cosign (e)

The screenshot shows the Epic EMR interface for a telephone encounter. The top navigation bar includes 'Telephone Call' (highlighted with a yellow circle), 'Call Intake', 'Refill', 'Orders Only', 'Status Board', 'Personalize', 'UpToDate', 'Patient Station', 'My Reports', 'SlicerDicer', 'UCMC Tools', 'Remind Me', 'Triage Call', 'Dragon Login', 'Print', and 'Log Out'. The patient information section on the left includes 'Ambulatory/III CBISTest', 'Male, 74Yrs, 12/11/1947', 'Sex Assigned At Birth: None', 'MRN: 2861581', 'Phone: 312-222-2222', 'Code: DNAR* (has ACP docs)', 'HCA: Active', 'OON: None', 'Attending: None', 'FCP: None', 'IMAGING AND PROCEDURES: None', 'MDRO: OTHER', 'Stephen J Heaney, M.D. PCP - General', 'Coverage: None', 'Allergies (14)', 'Pathway: None', '6/30 TELEPHONE', 'No contact', 'Ht: 162.6 cm (5' 4")', 'Weight: 55 kg (121 lb 4.1 oz) >365 days', 'SINCE LAST PRIMARY CARE GROUP VISIT', 'IM/Peds', 'No results', 'CARE GAPS', 'LUNG CANCER SCREENING', 'ZOSTER SERIES VACCINE (1 o...', 'ANXIETY SCREENING', 'AAA SURVEILLANCE 4.5-5.4 cm', 'Start Review', and '+ ADD ORDER'. The main content area shows the visit title '6/30/2022 visit with Julie L Oyler, M.D. for Telephone' and various tabs: 'Contacts', 'Reason for Call', 'COVID-19 Screening', 'BMV Screening', 'PT Vitals', 'Allergies', 'SmartSets', 'Nursing Assessment', 'Current Meds', 'History', 'Problem List', 'Visit Diagnoses', 'RPM', 'Non Clinical Telephone Notes', 'Routing', 'PowRx', and 'Sign Encounter'. The 'Contacts' section shows 'No contacts'. The 'Reason for Call' section shows 'No reason for call.'. The 'COVID-19 Screening' section shows 'No data found.'. The 'BMV Screening' section shows 'No data found.'. The 'Patient Reported Vitals' section shows 'No data found.'. The 'Allergies/Contraindications' section shows a table of allergies:

Allergies	Reaction	Severity	Reaction Type	Noted	Valid Until	Updated
Iodine	Dizziness	High	Allergy			
Milk	Dizziness	High				

The 'Documentation' section on the right shows a 'Create Note' button (highlighted with a yellow arrow) and 'No notes of this type file'. The 'SIGN ENCOUNTER' button is at the bottom right (highlighted with a yellow arrow). A yellow arrow points to the 'ADD ORDER' button at the bottom left.

c. Write a short note documenting discussion with patient

e. OK for residents to Sign Encounter for Telephone notes

d. Place orders, sign using Faculty Coach name or the Faculty most recently staffed patient