Department-Specific Epic Training, Student Edition

Updated September Jan 2025

Purpose

To ensure the student's Epic profile is properly built

To educate and simulate most common workflows within Epic

To start conversation between student and CI regarding charting styles and preferences, and provide opportunity to troubleshoot questions/problems

Not, necessarily, intended to teach the user how to document, but how to use some of the tools at their disposal

Overview

- Build Check
- Patient lists & List Columns
- Chart Review & Associated Tools
- Flowsheets & Data Input
- End of Day Duties

Check the Build

Log in department should be	
VUH Physical Therapy	VUH Occupational Therapy

Tabs across the top should contain					
Eval/Treat Navigator	Flowsheets	Chart Review	Summary	Notes	Demographics

If not, please contact Taylor or Bobby to enter Help Desk ticket to modify account build
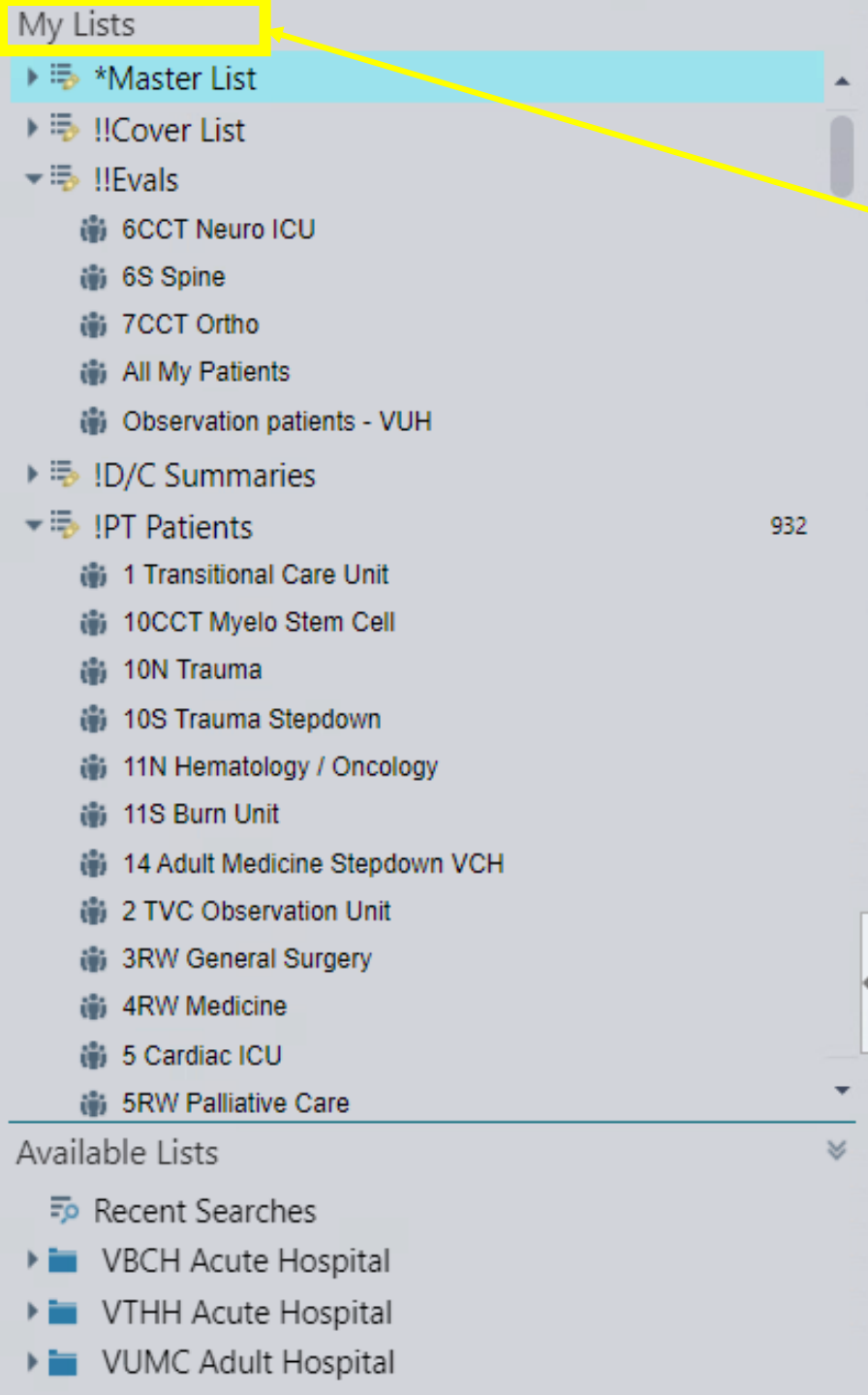
Patient Lists

"My Lists" vs System Lists

System Lists

- *Created by the institution*

- *Distinguishes patients by a host of features:*

  location, diagnosis, procedures, consulting service, admission status, insurance coverage, ice cream preferences
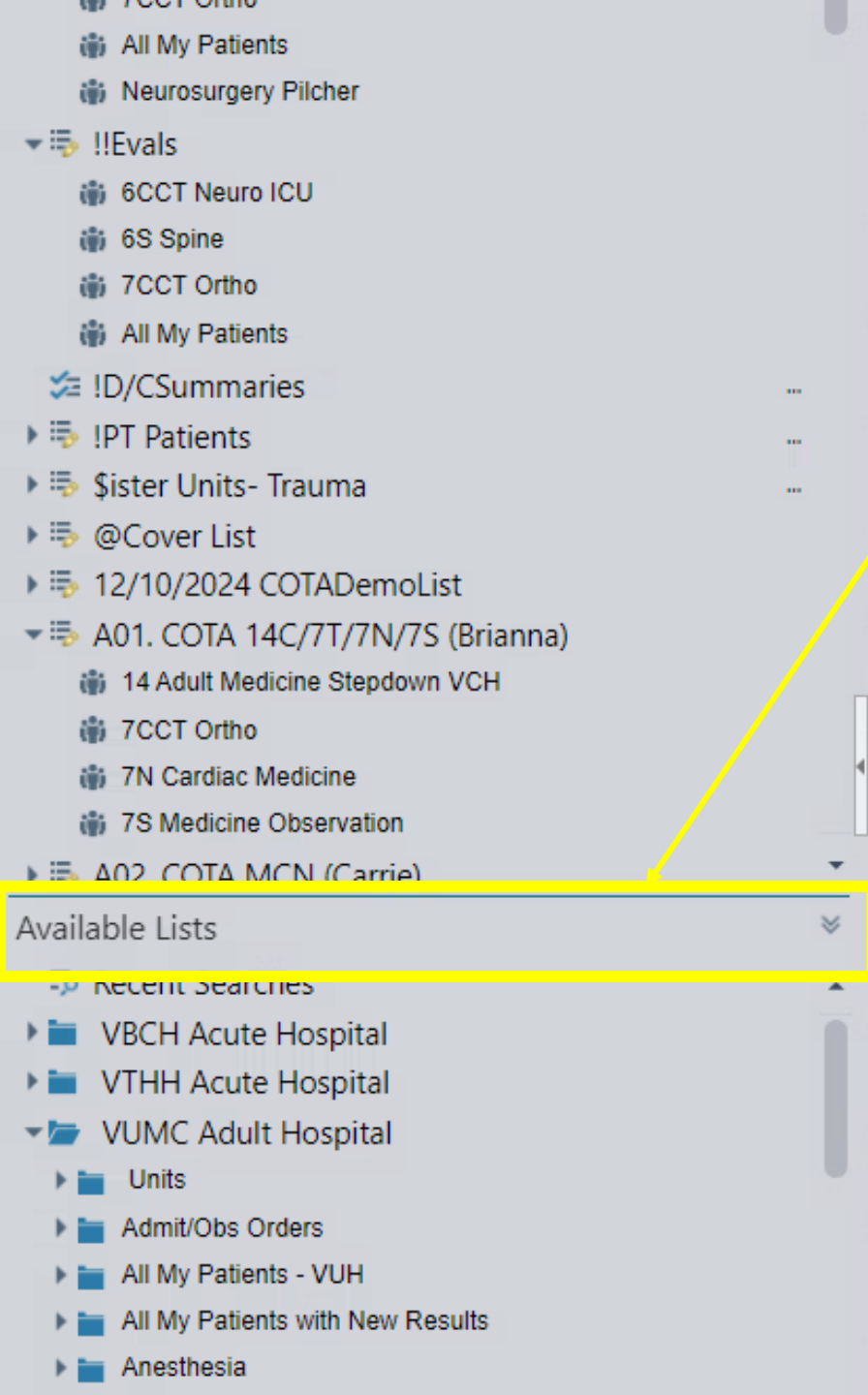
My Lists

- *Created by the user or shared with the user*

  i. Department pre-builds

  ii. Shared lists

My Lists

- Created by the user or shared with the user

i. Department pre-builds

ii. Shared lists

- Customizable

- Infinite– as many as you want for whatever purpose needed

System Lists

- Includes familiar and personalized lists, such as

  - "All My Patients"
  - Team- ortho total joint
  - Units- 6S

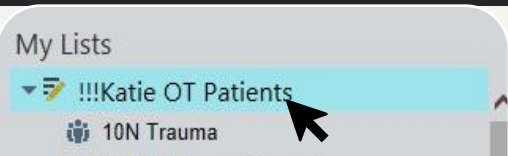- As well as hospital initiatives, such as "Priority Discharges"
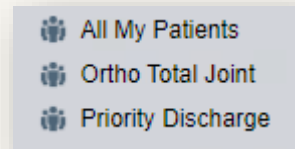
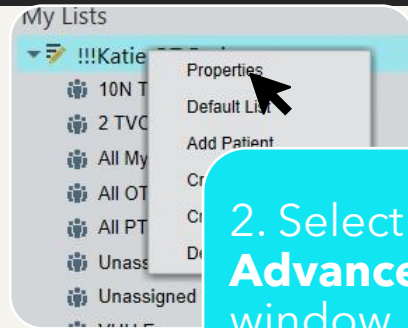# *Video Demo: Patient Lists and Columns*

Patient Lists & Editing My Lists Columns.mp4

Patient Lists: How to view your CI/FE's list

My Lists

▾ ≣ !!!Katie OT Patients
  🖳 10N Trauma
  🖳

CI/FE must *share* their list with the student:

1. From the far-left sidebar, right-click the list to share.

My Lists

▾ ≣ !!!Katie...
  🖳 10N T...   Properties
  🖳 2 TVC...   Default Li...
  🖳 All My...   Add Patient
  🖳 All OT...   Cr...
  🖳 All PT...   Cr...
 🖳 Unass...   De...
  🖳 Unassigned
  🖳

2. Select **Properties** and go to the **Advanced** tab within the pop-up window.

3. Add student to "User" line

4. Select level 3, or "add/remove" patients.

General   Criteria   Advanced   Epic Monitor

Default Report: [🔍]

Refresh Interval (in minutes): [   ]

☐ Show number of patients in the list

☐ Suppress rich features and allow flexible row height

Allow access to any of the following:

User	Access Level
student's name here	Add/Remove Patients
🔍	
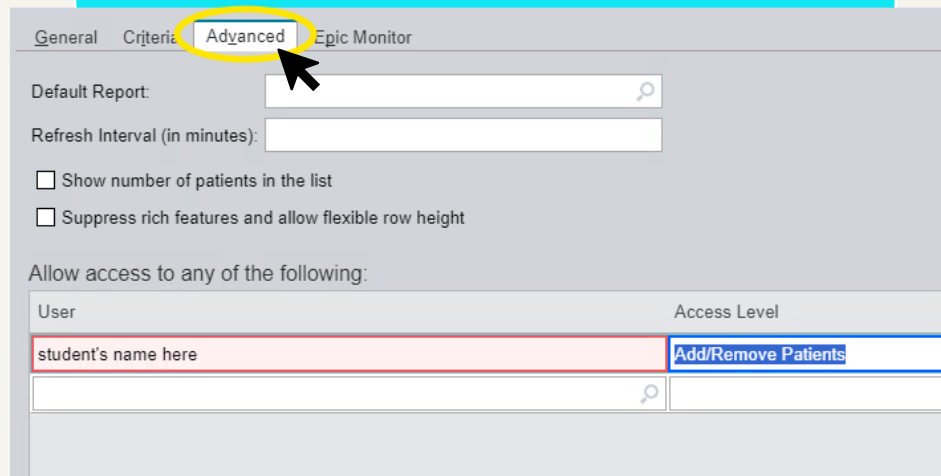
Student can now view the list under the **Shared Lists** heading of their patient list side bar

▾ 📁 Shared Patient Lists
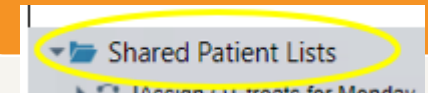
List Columns

Taylor's Patients 19 Patients

PT Priority	OT Priority	PT Needs Update	OT Needs Update	PT Order Status	OT Order Status	Priority Discharge	PT Progress Note Due Date	OT Progress Note Due Date	Today's charges

Patient Lists: Columns to Discuss

PT or OT Priority

PT Priority	OT Priority	PT Needs Update	OT Needs Update	PT Order Status	OT Order Status	Priority Discharge	PT Progress Note Due Date	OT Progress Note Due Date	Today's charges

Taylor's Patients 19 Patients

- A means of internal communication to designate or prioritize patients for follow-up treatment

- Workflow sequence:

Double-click the dash (-) in priority column to open pop-up

Select the number and/or applicable title

Subsequent providers (therapists or assistants) should *remove* the number after treatment (titles, such as CVA, total joint, etc. may remain)
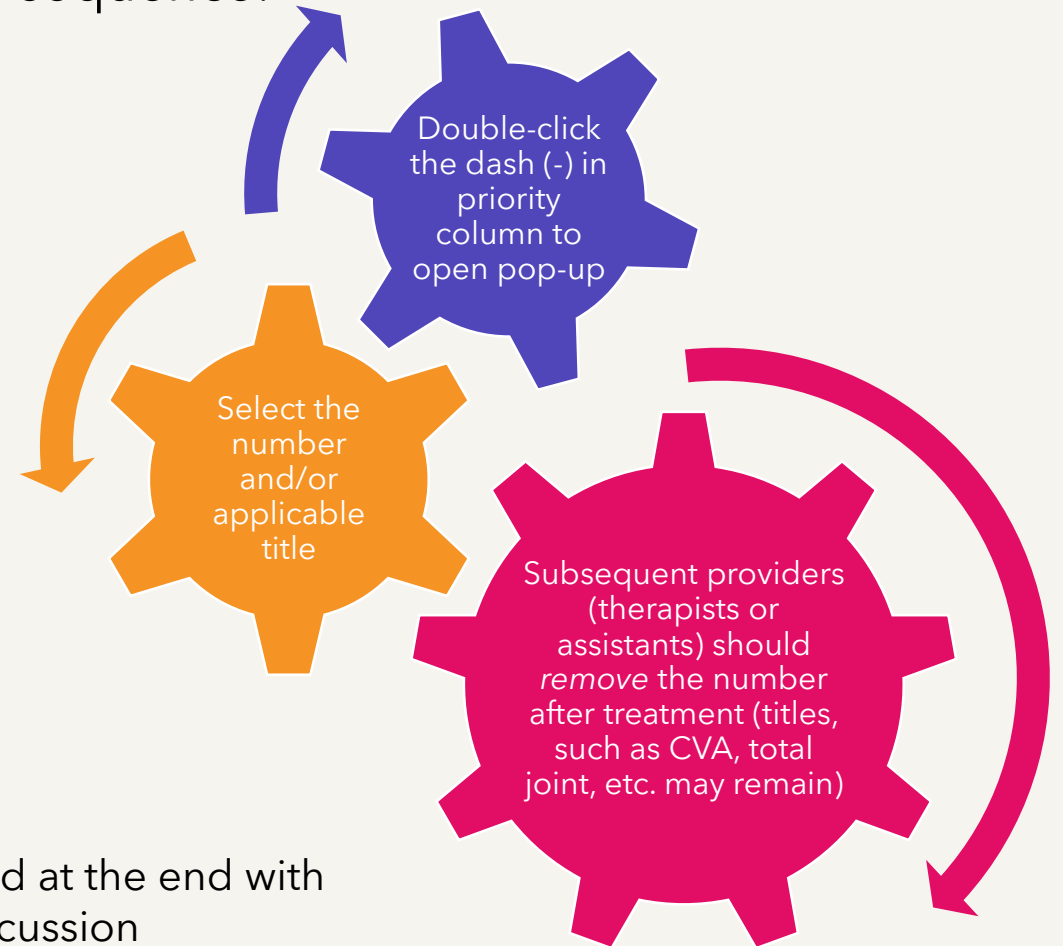
This is reviewed at the end with end of day discussion

OT/PT Needs Update

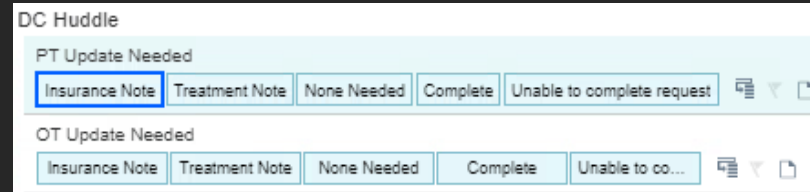Taylor's Patients 19 Patients

PT Priority	OT Priority	PT Needs Update	OT Needs Update	PT Order Status	OT Order Status	Priority Discharge	PT Progress Note Due Date	OT Progress Note Due Date	Today's charges

Contains icons:

Icon	Meaning	Notes
	Insurance Note	As Requested by TMO Rep.
	Treatment Note	
	Complete	Possible Responses of Therapy Staff
	Unable to Complete	
	None Needed	

To respond, double click the list icon to pull up the DC Huddle Dashboard:

DC Huddle

PT Update Needed
Insurance Note | Treatment Note | None Needed | Complete | Unable to complete request

OT Update Needed
Insurance Note | Treatment Note | None Needed | Complete | Unable to co...

Or use flowsheet row under the treatment tab:

PT Treat | All Doc | OT Eval | OT Treat | COTA Treat | PTA Treat

1m 5m 10m 15m 30m 1h 2h 4h 8h 24h Interval Start: 0700 Reset Nov

Admission (Current) from 1/13/2025 in Vanderbilt University Adult Hospital with

| | 1/15/2025 | | 1/16/2025 | Last Filed |
| | 0800 | 1936 | 0900 | |

Goals
Goal Formulation — With patient
Patient and Family Goal — Go home
Therapeutic Interventions
Gait/Mobility (mins) — 10
Therapeutic Exercise (mins) — 5
Therapeutic Activity (mins) — 8
Total timed code treatment minutes (mins) — 8
Was patient co-treated? — Yes
1:1 Supervision Provided?
PT Update Needed

1/15/25 1936

PT Update Needed
Select single option (F5)
Insurance Note
Treatment Note
None Needed
Complete
Unable to complete request
Comments (Alt+M)

Group Information
Row must be completed for reporting or compliance reasons!

More "Needs Update" Icon Details

Insurance Note – Facility or Insurance is requiring renewed confirmation of need. These are high priority and should be scheduled to be seen and charted on by 11 AM the following day.

Treatment Note – Request made by member of medical team for patient to be treated.

Updated Note Complete – After note is finished, clinician clicks "Complete" in the huddle dashboard to signal request has been satisfied (Icon refreshes after 48 hours).

PT/OT "Order Status"

PT Priority	OT Priority	PT Needs Update	OT Needs Update	PT Order Status	OT Order Status	Priority Discharge	PT Progress Note Due Date	OT Progress Note Due Date	Today's charges

Also, icons-based:

Icon	Meaning
	New Order
	Acknowledged Order
	Order Near Expiration
	Order Expired
	Order Canceled

Click for Video Demo: Order Status Icons: Demo Order Status Icons.mp4

Crtl + click to follow links to video demos

Priority Discharge

Notes:

- "yes," "no," or" --"

- Additional comments should specify if your discipline is needed

- If no comments for your discipline, then no special treatment is necessary

Progress Note Due Date

- Calculates from the date entered on evaluation, re-evaluation, or from previous progress note to track when progress note is due

- Therapist must update plan of care with a progress note-- begin via treatment tab flowsheet selection (A), followed by use of progress note template in Notewriter (B)-- every 30 days (+/- 7 days) on all patients

A.

B.

- You can designate patients in the priority column with "Progress Note"

Today's Charges

Helps you ensure that billed correctly as part of end of day workflow

Bed/Location	Demographics	Primary Problem	Most Recent Procedure (Last 3 Days)	PT Order Status	OT Order Status	Primary Team	Today's charges ▾
G-1...	...na ...y...	Abdominal pain (Principal Hospital Problem)	—	—	📑	Riven Obs A 6158318338@...	42400004 - HC PT EVAL MOD COMPLEX 30 MIN (Weilbaker, Amy, PT)
672	...e... ...y...	Uncontrolled hypertension (Principal Hospital Problem)	—	—	📑	Riven Hospital Medicine 1 6158357265@...	42400003 - HC PT EVAL LOW COMPLEX 20 MIN (James, Ryan K, PT)
644	...t...	Syncope, unspecified syncope type (Principal Hospital Problem)	—	☑	☑	Riven Hospital Medicine 5 6158314252@...	42000015 - HC THERAPEUTIC ACTIVITIES 15 MIN (Douglas, Sarah Elizabeth, PT)...
622...	......	Penetrating abdominal trauma (Principal Hospital Problem)	1/14 1030 ESOPHA... (EGD)...	☑	📑	Trauma NP T4 6158354013@...	42000012 - HC GAIT TRAINING 15 MIN (Blandford, Allison S, PT) 42400004 - HC PT EVAL MOD COMPLEX...
662	...n... ...y...	Seizure (CMS/HCC) (Principal Hospital Problem)	—	☑	☑	Riven Hospital Medicine 1 6158357265@...	42000012 - HC GAIT TRAINING 15 MIN (Black, Danielle Alyse, PT, DPT) 42000015 - HC THERAPEUTIC ACTIVITIES...
670...	...c...	Respiratory symptoms (Principal Hospital Problem)	1/15 1605 Right Heart Cath - N/...	☑	☑	Rogers Renal 6158314783@...	42000012 - HC GAIT TRAINING 15 MIN (James, Ryan K, PT)
762	...i... ...y...	Closed fracture of multiple ribs of both sides, initial...	—	☑	☑	Trauma NP T4 6158354013@...	42000012 - HC GAIT TRAINING 15 MIN (Jones, Lisa Ann, PTA) 42000015 - HC THERAPEUTIC ACTIVITIES...
663...	......	Trauma (Principal Hospital Problem)	—	☑	☑	Neurosurgery Pilcher 6158316365@...	42000009 - HC THERAPEUTIC EXERCISES 15 MIN (Khalil, Hailey, PTA) 42000015 - HC THERAPEUTIC ACTIVITIES...

Other General Column Suggestions

- Demographics
- Room/patient location
- Team with pager number
- Assist Level
- Most Recent Procedure (Last 3 Days)
- OT/PT and COTA/PTA
- Discharge recommendations
- Last 3 visits
- Frequency
- PT/OT Sticky Note
- Nurse
- Patient class
- Primary Diagnosis

Other Columns of Interest

VENT modes

RASS score

Isolation

Opposite discipline items

Chart Review & Associated Tools

Chart Review Discussion Topics

Encounters Tab- lists events such as hospital admissions and office visits

Different ways to review:
a) "Chart Review" – contains notes from any encounter
b) "Notes" – only entries from current encounter

Using the wrench icon to change the default chart review tab and to edit the order

Set-up Chart Review filters

Wrenching in "Active Orders" into summary activity

Utilizing the pasteboard

Video Demo: Tabs, Chart Review vs Notes, Pasteboard

Activity Tabs.mp4

Chart Review Filters & Chart Review v Notes Tab.mp4

Pasteboard.mp4

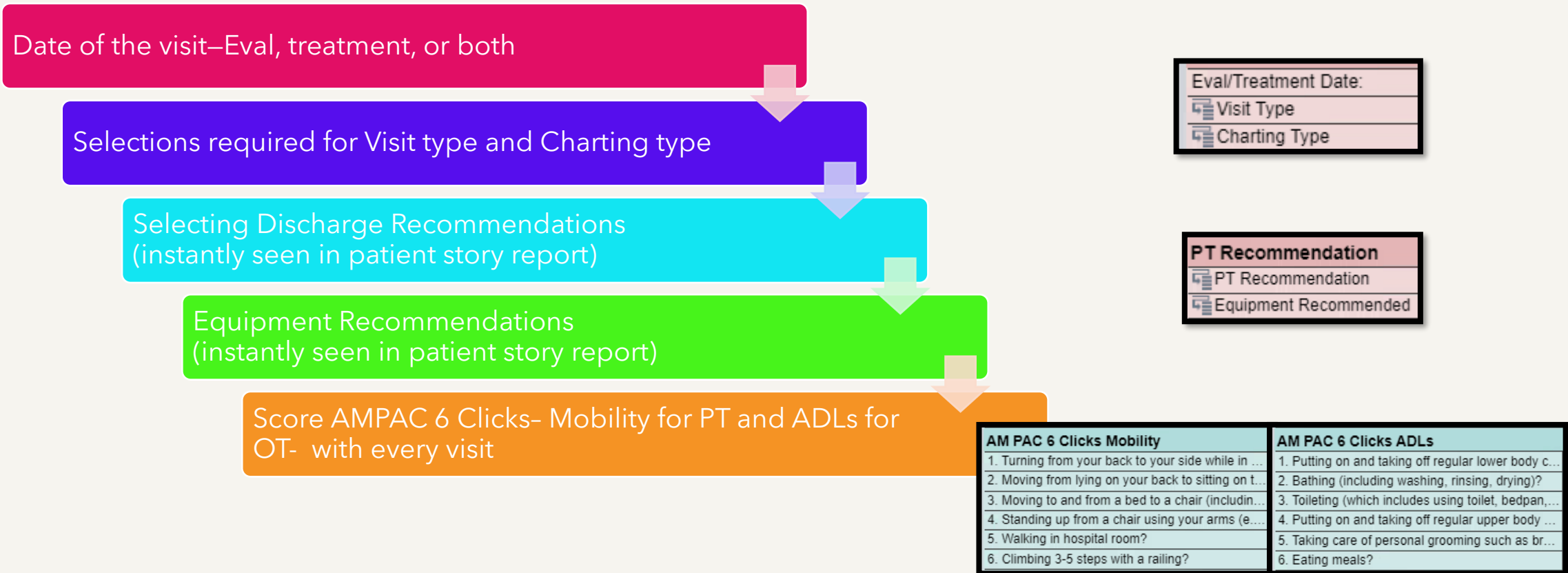Crtl + click to follow links to video demos

Flowsheets & Data Input

Flowsheets – General Info

1. Versatile means for data entry and note collection

2. Includes pick lists and narrative comments

3. A tool, and not necessarily intended to force a style upon the user

4. Only some are mandatory for chart review/auditing purposes

5. If it doesn't need to be commented on, then resist the compulsion

Required Flowsheet Entries

Date of the visit—Eval, treatment, or both

Selections required for Visit type and Charting type

Selecting Discharge Recommendations
(instantly seen in patient story report)

Equipment Recommendations
(instantly seen in patient story report)

Score AMPAC 6 Clicks- Mobility for PT and ADLs for OT- with every visit

Eval/Treatment Date:
Visit Type
Charting Type

PT Recommendation
PT Recommendation
Equipment Recommended

AM PAC 6 Clicks Mobility	AM PAC 6 Clicks ADLs
1. Turning from your back to your side while in ...	1. Putting on and taking off regular lower body c...
2. Moving from lying on your back to sitting on t...	2. Bathing (including washing, rinsing, drying)?
3. Moving to and from a bed to a chair (includin...	3. Toileting (which includes using toilet, bedpan,...
4. Standing up from a chair using your arms (e...	4. Putting on and taking off regular upper body ...
5. Walking in hospital room?	5. Taking care of personal grooming such as br...
6. Climbing 3-5 steps with a railing?	6. Eating meals?

Flowsheets considerations:

Billing time,
Student and assistant supervision/correspondence,
and Co-treatment

Treatment Minutes –
Record approximate times for each billing category

Denote total billable time in Total Timed Code

Remember the 8-minute rule

1:1 supervision (students only)– should select the auto-populated response whenever applicable

Therapist Communication (assistants only)

Co-treatment

• Select when patient is Observation Status, and
• "Total Timed Code Treatment Minutes" does not match the total time spent with patient
• Explain via the comment box for any discrepancy due to splitting between clinicians

Therapeutic Interventions
Gait/Mobility (mins)
Therapeutic Exercise (mins)
Therapeutic Activity (mins)
Total timed code treatment minutes (mins)
Was patient co-treated?
1:1 Supervision Provided?
PT Update Needed

Flowsheet Rows

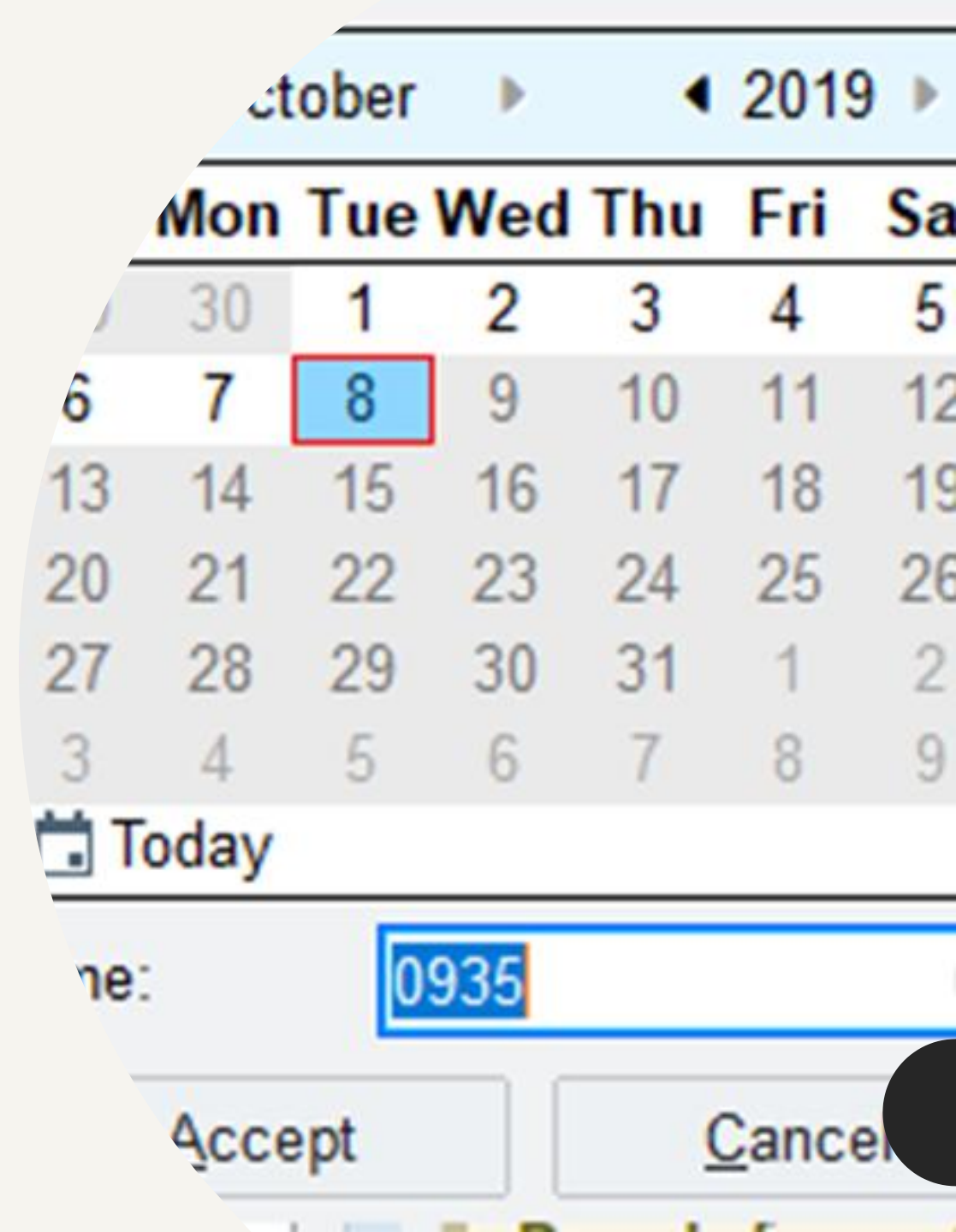- **Wild Cards**, symbolized by ***

  Allows users to leave a placeholder to return to within the NoteWriter

  Must be resolved prior to signing a note

- **24-hour Rule –**

  The note must be created within 24 hours of time column for flowsheets.

  Caution: flowsheet data will therefore pull in for notes on follow up visits that are within< 24 hours (such as BIDs)

Contact Notes and Failed Attempts

Contact Note –

A. Describes an instance where no attempt was made (i.e. due to medical status, off the unit, etc), or

B. Denotes successful contact/interaction with patient/caregiver but not billable time

Failed Attempt – describes a planned visit was unsuccessful

IMPORTANT: If discharging a patient from therapy services as part of either option above, also select for "Treatment Frequency" as **Discharged from Therapy** in treatment plan

PT Treatment Plan

Treatment Frequency

| 1=1x/wk | 2=2x/wk | 3=3x/wk | 4=4x/wk | 5=5x/wk | 6=6x/wk | 7=Daily | 14=T... | 1 visit | 2 visits | 3 visits | 4 visits | 5 visits | 6 visits | 7 visits | 8 visits | Hold | Re-Eval | Disch... | Maint... |

Charting Demos

- Failed Attempt (all users):

  Charting FAs and CNs.mp4
- Eval Note (therapist students only):

  Charting Eval A-- Eval only (Student).mp4
- Treatment Note (all users):

  Charting Treatment Note.mp4
- Adding Treatment to Eval (therapist students only):

  Charting Eval B-- Adding Treatment.mp4

Crtl + click to follow links to video demos

Cosigning Student Notes

Student enters the name of supervising CI/FE as cosigner at the very top of Notewriter sidbar

Make edits per preferences of supervisor– flowsheets vs in note writer, etc

Cosigning ultimately happens from within the "In Basket" tab

Remind your CI/FE to drop charges

End of Day Duties

End of Day Duties

My Note

Note Details

Date of Service: 1/16/2025   03:00 PM

☑ Cosign Required?   Cosigner: [ ]

Review and Cosign Notes

Today's charges ▾

42400004 - HC PT EVAL MOD COMPLEX 30 MIN (Weilbaker, Amy, PT)

42400003 - HC PT EVAL LOW COMPLEX 20 MIN (James, Ryan K, PT)

42000015 - HC THERAPEUTIC ACTIVITIES 15 MIN (Douglas, Sarah Elizabeth, PT)...

42000012 - HC GAIT TRAINING 15 MIN (Blandford, Allison S, PT)
42400004 - HC PT EVAL MOD COMPLEX...

42000012 - HC GAIT TRAINING 15 MIN (Black, Danielle Alyse, PT, DPT)
42000015 - HC THERAPEUTIC ACTIVITIES...

42000012 - HC GAIT TRAINING 15 MIN (James, Ryan K, PT)

42000012 - HC GAIT TRAINING 15 MIN (Jones, Lisa Ann, PTA)
42000015 - HC THERAPEUTIC ACTIVITIES...

42000009 - HC THERAPEUTIC EXERCISES 15 MIN (Khalil, Hailey, PTA)
42000015 - HC THERAPEUTIC ACTIVITIES...

Verify Today's Charges (charges are added by CI/FE)
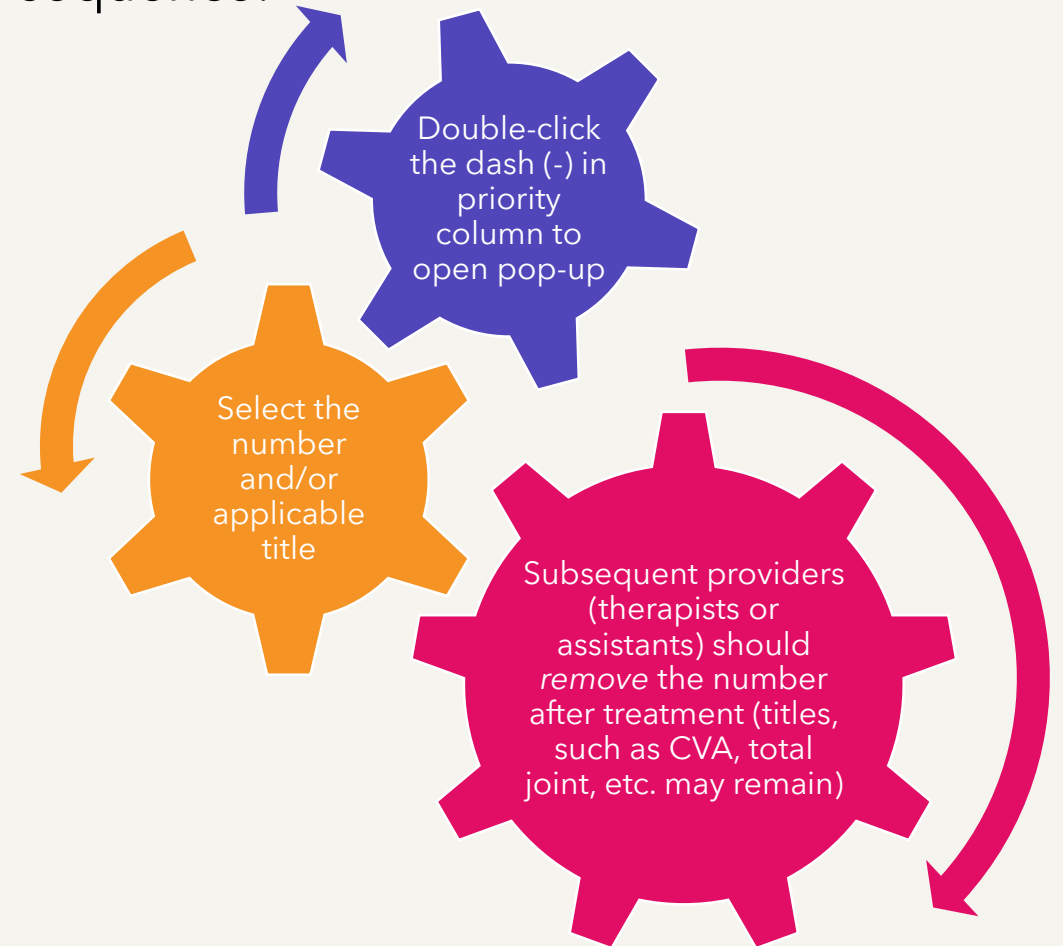
Indicate Priorities for Tomorrow

PT Priority

☐ 1   ☐ 2   ☐ 3   ☐ 4   ☐ 5   ☐ 6   ☐ 7   ☐ 8   ☐ 9   ☐ 10   ☐ Therapist   ☐ -   ☐ Acoustic Neuroma   ☐ CVA   ☐ Total Joint   ☐ Ortho Non-joint   ☐ ERAS   ☐ OTO   ☐ Admin

☐ Pager   ☐ Splint   ☐ Splint Check   ☐ Priority Discharge   ☐ Insurance Note   ☐ Sunday (Insurance Note)   ☐ VSRH 1   ☐ VSRH 2   ☐ VSRH 3   ☐ Hold   ☐ Re-Eval   ☐ Progress Note   ☐ Monday Treatment

☐ Saturday   ☐ Saturday Discharge   ☐ Sunday   ☐ Sunday Discharge   ☐ Study Patient A   ☐ Study Patient B   ☐ Study Patient C   ☐ Study Patient D   ☐ Study Patient E   ☐ Study Patient F   ☐ Study Patient G

☐ Study Patient H

Taylor's Patients 19 Patients

PT Priority	OT Priority	PT Needs Update	OT Needs Update	PT Order Status	OT Order Status	Priority Discharge	PT Progress Note Due Date	OT Progress Note Due Date	Today's charges

Recall the previous slide for Priority Buttons

- Priority Columns represent internal communications to designate or prioritize patients for follow ups

- Workflow sequence:

Double-click the dash (-) in priority column to open pop-up

Select the number and/or applicable title

Subsequent providers (therapists or assistants) should *remove* the number after treatment (titles, such as CVA, total joint, etc. may remain)

Priority Options

- **Numbers** indicates the priority of patients to be seen the next day by the assistant or treating therapist (Lower number indicates higher priority)
  - *Each floor has a designated allotment of treatment slots*
  - *Remember: Subsequent providers (therapists or assistants) should remove the number after treatment (titles, such as CVA, total joint, etc. may remain)*

PT Priority

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ Therapist ☐ - ☐ Acoustic Neuroma ☐ CVA ☐ Total Joint ☐ Ortho Non-joint ☐ ERAS ☐ OTO ☐ Admin

☐ Pager ☐ Splint ☐ Splint Check ☐ Priority Discharge ☐ Insurance Note ☐ Sunday (Insurance Note) ☐ VSRH 1 ☐ VSRH 2 ☐ VSRH 3 ☐ Hold ☐ Re-Eval ☐ Progress Note ☐ Monday Treatment

☐ Saturday ☐ Saturday Discharge ☐ Sunday ☐ Sunday Discharge ☐ Study Patient A ☐ Study Patient B ☐ Study Patient C ☐ Study Patient D ☐ Study Patient E ☐ Study Patient F ☐ Study Patient G

☐ Study Patient H

Priority Options

- **Therapist:** Indicates follow up should be completed by a therapist, rather than an assistant.

Note: Best practice is to document the reason in PT/OT Sticky note

PT Priority

□ 1 □ 2 □ 3 □ 4 □ 5 □ 6 □ 7 □ 8 □ 9 □ 10 □ Therapist □ - □ Acoustic Neuroma □ CVA □ Total Joint □ Ortho Non-joint □ ERAS □ OTO □ Admin
□ Pager □ Splint □ Splint Check □ Priority Discharge □ Insurance Note □ Sunday (Insurance Note) □ VSRH 1 □ VSRH 2 □ VSRH 3 □ Hold □ Re-Eval □ Progress Note □ Monday Treatment
□ Saturday □ Saturday Discharge □ Sunday □ Sunday Discharge □ Study Patient A □ Study Patient B □ Study Patient C □ Study Patient D □ Study Patient E □ Study Patient F □ Study Patient G
□ Study Patient H

Priority Options

- **Titles or Diagnosis indicators:** Can be used in conjunction with a number or other priority designations.

- **Insurance note:** needs to be seen next day for insurance or facility approval.

- **Sunday (Insurance note):** Select on Friday when patient will need to be seen on Sunday for Insurance Note.

- **VSRH 1, 2, 3:** indicates treatment was requested on the Stallworth Email (1st, 2nd, and 3rd priority)

- **Hold:** Patient awaiting surgery, not medically appropriate, has new bedrest orders, etc.

Priority Options

- **Saturday or Sunday Discharge:** Used for a patient who will discharge that day and is pending something from therapy.

- **Study Patients (A to E):** Used to identify patients involved in departmental studies.

- **Splint:** (OT only) Identifies a new splint need

- **Splint Check:** (OT only) Identifies splints needing f/u

- **Admin:** Request identified by CTL/CC/Manager for patient to be seen as soon as possible.

- **Pager:** Designates pager requests needing f/u. Please add a PT/OT Sticky Note with pertinent details.

PT Priority

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ Therapist ☐ - ☐ Acoustic Neuroma ☐ CVA ☐ Total Joint ☐ Ortho Non-joint ☐ ERAS ☐ OTO ☐ Admin

☐ Pager ☐ Splint ☐ Splint Check ☐ Priority Discharge ☐ Insurance Note ☐ Sunday (Insurance Note) ☐ VSRH 1 ☐ VSRH 2 ☐ VSRH 3 ☐ Hold ☐ Re-Eval ☐ Progress Note ☐ Monday Treatment

☐ Saturday ☐ Saturday Discharge ☐ Sunday ☐ Sunday Discharge ☐ Study Patient A ☐ Study Patient B ☐ Study Patient C ☐ Study Patient D ☐ Study Patient E ☐ Study Patient F ☐ Study Patient G

☐ Study Patient H

Thanks for your attention

Consult with your CI or Epic Superuser regarding any questions or concerns, or suggestions for this training material