EPIC Training

Shared Encounter Tip Sheet

Beacon | Attending, APP, Nurse

Shared Encounters

Encounter= A clinical contact. For example, an office visit, an admission, or a telephone encounter. Even if more than one evaluation or procedure takes place at a visit, it is still usually considered one encounter.
An office visit can be shared with multiple clinicians (APP/MD, APP/RN) which is considered a shared encounter.

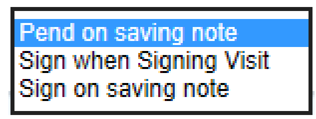
Start the Visit

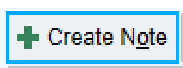
1. If the provider on the schedule is generic (BMT Blue Attending), single select the patient's appointment and right click to Change Provider to me.
   - This can also be done from the Schedule toolbar. 

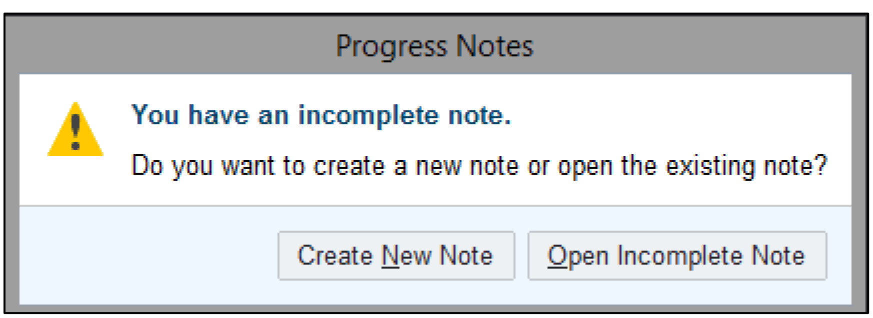
2. Double click on the appointment to enter the encounter and complete visit documentation as applicable.

Notes

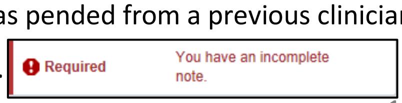
1. Open **Notes** in the sidebar and document using a SmartText, SmartPhrase, Dragon or free text.
   - If the note is complete, keep the setting **Sign when Signing Visit**.
   - If the note is not complete and needs to be edited after the second clinician documents, change the note to **Pend on saving note** and **Accept**.



2. The second clinician will need to complete their own note.
3. The second clinician will select  from the top of the **Notes** tab or use a speed button to apply a SmartText.
   - Speed buttons can be added by selecting the  in the top right of the sidebar. Search for the SmartText or Phrase to create a speed button.
   - If a note is incomplete from the previous clinician, a pop up window will ask if a new note is needed or you want to Open the incomplete note. Make sure to select **Create New Note** as each clinician will have their own note.



4. The highest billable provider would enter a **Level of Service** from the visit taskbar. 

5. Since LOS is required to close the encounter, the highest billable provider would likely be the one to Sign the Visit.
   - If a note was pended from a previous clinician, the visit cannot be signed until all providers have signed their notes. 

Make a change to a closed encounter

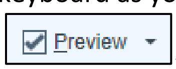
If you need to correct or add to your documentation for a closed encounter, create an addendum.

1. Open your schedule to the day of the visit you want to change.
2. Double-click the appointment you want to change. In the window that appears, click **Create Addendum**.

> You can also create addenda in other ways:
> - In Chart Review, go to the **Encounters** tab. Then select the encounter you want to addend and click **Encounter**.
> - Click the Epic button and select Patient Care > Addendum. Then look up your patient in the window that appears and select the encounter you want to change.

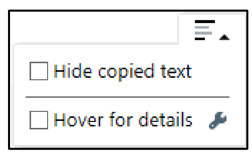
3. Make the necessary changes to the encounter.
4. When you've finished making changes, click **Sign Addendum** to the lower right in the Visit Taskbar.
5. If you want to route your addendum to someone else, enter their name in the **Recipient** field.
6. Click **Sign Addendum** again.

Viewing Multiple Notes in Chart Review

1. Open **Chart Review**, select the **Notes** tab.
2. Hold the Ctrl key down on your keyboard as you select all notes.
3. With the Preview box selected 

, select an option to **Review Selected** in the report viewer or **In Sidebar**. 

4. Notes will display on top of each other, scrolling may be required.
   - You can check the box to Hover for details.

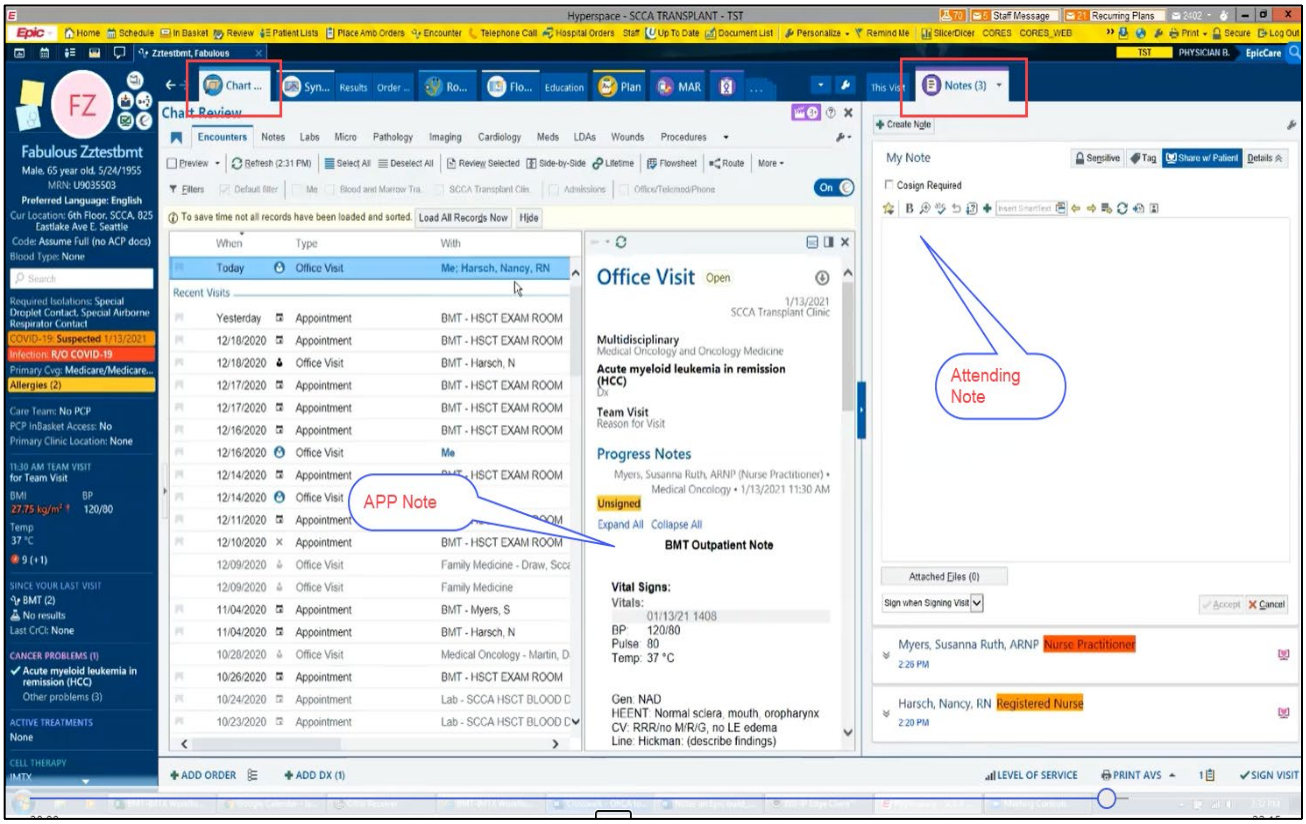


5. You can print the notes using the icon at the top of the report.

Second Clinician Views First Clinician's Note Side by Side

For example, first clinician is APP and second clinician is attending.

1. Second clinician: open Notes in the sidebar and select **Create Note** to begin your note.
2. Select the **Chart Review** activity.
3. Open the center pane if it is not already open.
4. Result: the first clinician's note displays.
5. To see the RN note, in the center pane, select the link under the Other Notes heading.



APP Note
Attending Note