

# EPIC Training

## Shared Encounter Tip Sheet

Beacon | Attending, APP, Nurse

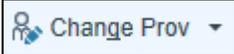
### Shared Encounters

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.

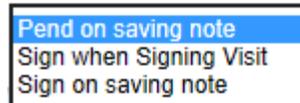
- This can also be done from the Schedule toolbar. 

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

### Notes

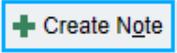
1. Open **Notes** in the sidebar and document using a SmartText, SmartPhrase, Dragon or free text.

- 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

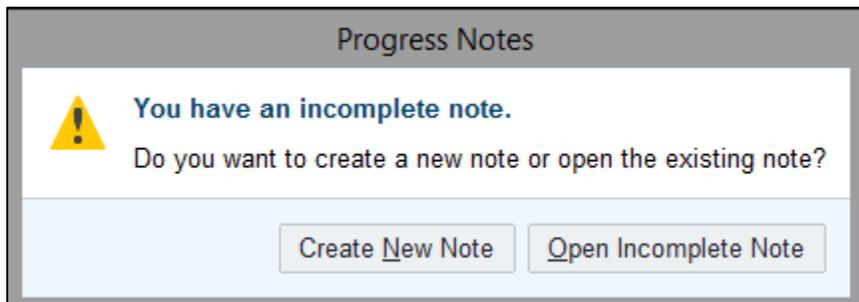


clinician documents, change the note to **Pend on saving note** and **Accept**.

2. The second clinician will need to complete their own note.

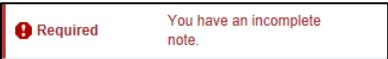
3. The second clinician will select  from the top of the **Notes** tab or use a speed button to apply a SmartText.

- 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. 

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### Make a change to a closed encounter

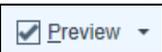
If you need to correct or add to your documentation for a closed encounter, create an addendum.

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**.

	<p>You can also create addenda in other ways:</p> <ul style="list-style-type: none"><li>• In Chart Review, go to the <b>Encounters</b> tab. Then select the encounter you want to addend and click  <b>Encounter</b>.</li><li>• Click the Epic button and select Patient Care &gt; Addendum. Then look up your patient in the window that appears and select the encounter you want to change.</li></ul>
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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.

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The screenshot displays the EPIC EHR interface for a patient named Fabulous Zstestbmt. The interface is divided into several sections:

- Header:** Shows the patient's name, MRN (U9035503), and location (SCCA Transplant - TST).
- Left Sidebar:** Contains patient demographics, preferred language (English), and clinical alerts such as "COVID-19 Suspected" and "Acute myeloid leukemia in remission (HCC)".
- Chart Review:** A central table listing recent visits. A red box highlights the "Chart..." button in the top navigation bar. A red box also highlights the "Notes (3)" button in the top right. A blue callout bubble labeled "APP Note" points to a visit entry on 12/14/2020 with the provider "Me".
- Office Visit Detail:** A detailed view of an "Office Visit" on 1/13/2021 at the SCCA Transplant Clinic. It includes a "Multidisciplinary" note for "Acute myeloid leukemia in remission (HCC)", "Progress Notes" by Susanna Ruth, ARNP, and "Vital Signs" (BP: 120/80, Pulse: 80, Temp: 37°C).
- Right Panel:** A "My Note" section with a "Sign when Signing Visit" dropdown and a list of signatories: "Myers, Susanna Ruth, ARNP Nurse Practitioner" (signed 2:25 PM) and "Harsch, Nancy, RN Registered Nurse" (signed 2:20 PM). A blue callout bubble labeled "Attending Note" points to the "My Note" section.