Engaging with EPIC: Leveraging EHR to Enhance Research

1

Learning Objectives

- Identify key EPIC features and tools that support efficient daily workflows across clinical, research, and operational roles.
- Apply practical strategies to streamline common tasks such as chart navigation, documentation, and patient tracking.
- Enhance coordination across care teams by leveraging EPIC tools that support shared workflows and information visibility.
- Incorporate best practices for documentation and workflow management to support compliance and data integrity.

2

Disclaimer: Epic May Vary

Before we begin:

- Epic configurations vary by institution
- Access and functionality depends on role

What you'll see today:

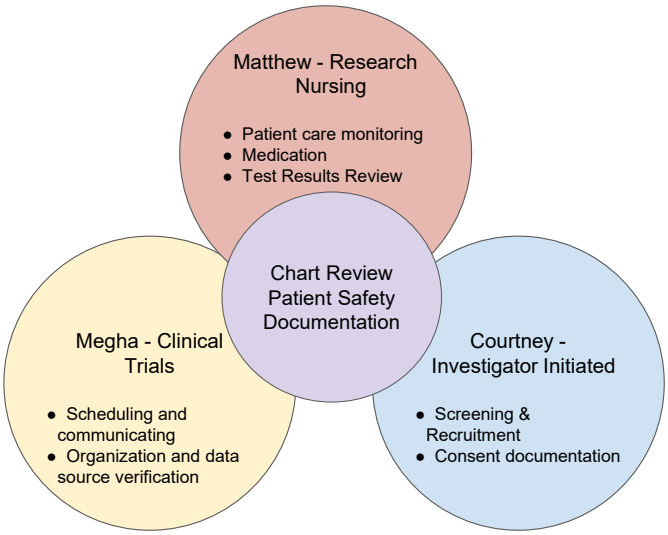
- Examples we demo using Epic Playground
- May not look exactly as yours

3

What we use Epic for

4

Shared Epic Workflows



5

What we will cover

- Scheduling appointments
- Communicating with the care team
- Patient list creation
- Viewing treatment plan
- Drug administration details
- Lab results
- Medication review
- SmartPhrases and documentation workflows

6

Question

- Background of audience
  - Research Nurse
  - Billing
  - Coordinator/Study team
  - Investigator
- What's your biggest frustration with EPIC? → Free text option or chat

7

Scheduling Appointments

Prevents delays and supports smooth patient flow

8

Considerations

- Not everyone will have the authority to schedule appointments
- Some institutes need the scheduler to link the appointment with a specific research study to ensure proper billing
- Please understand your institution requirements before scheduling any appointments

Applications

- Coordinate appointments across multiple departments when needed
- Improve workflow planning for complex study schedules

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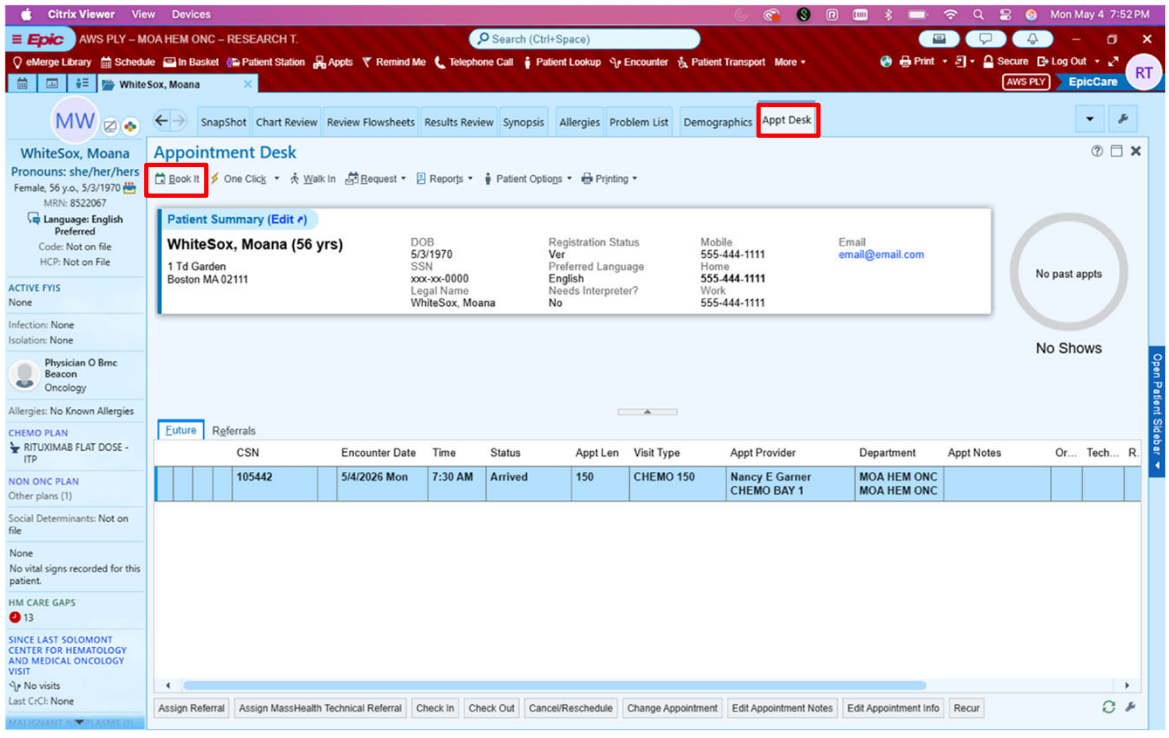
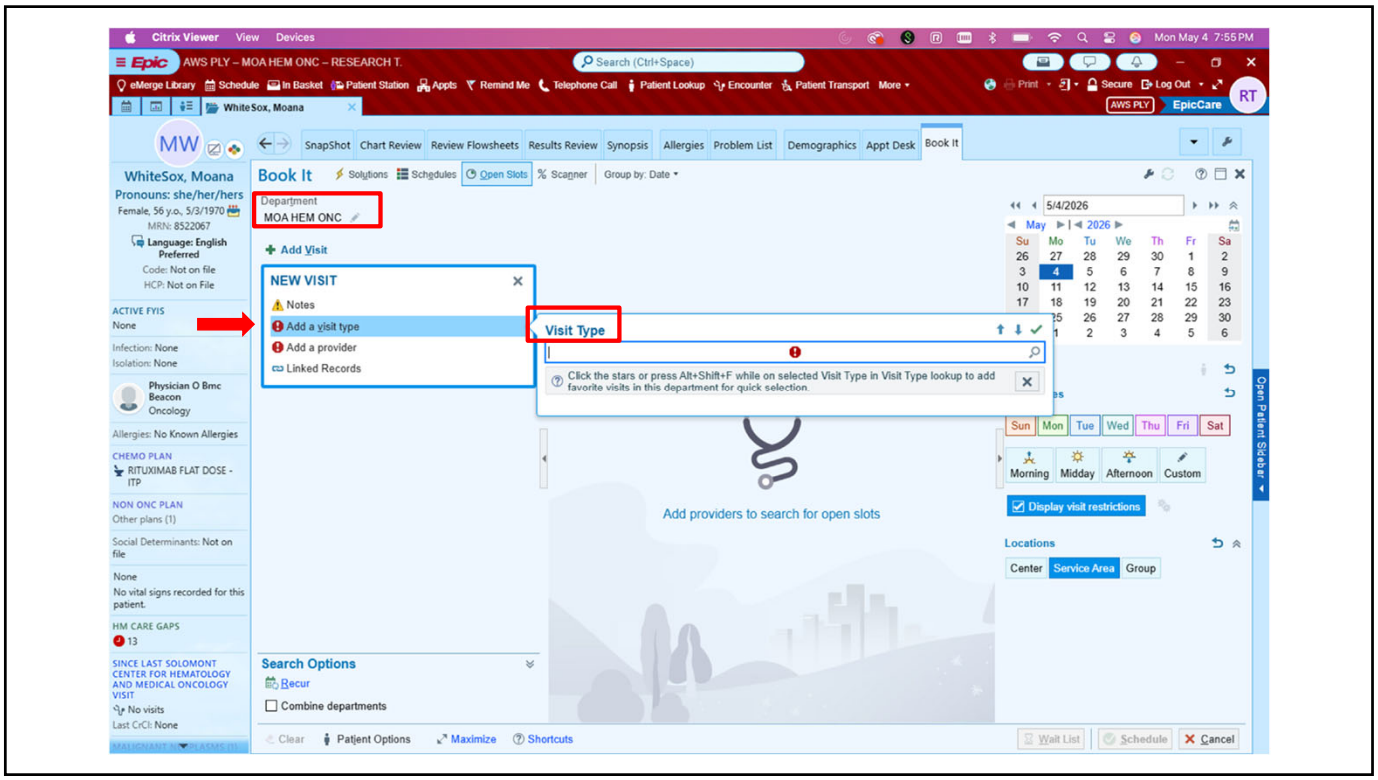
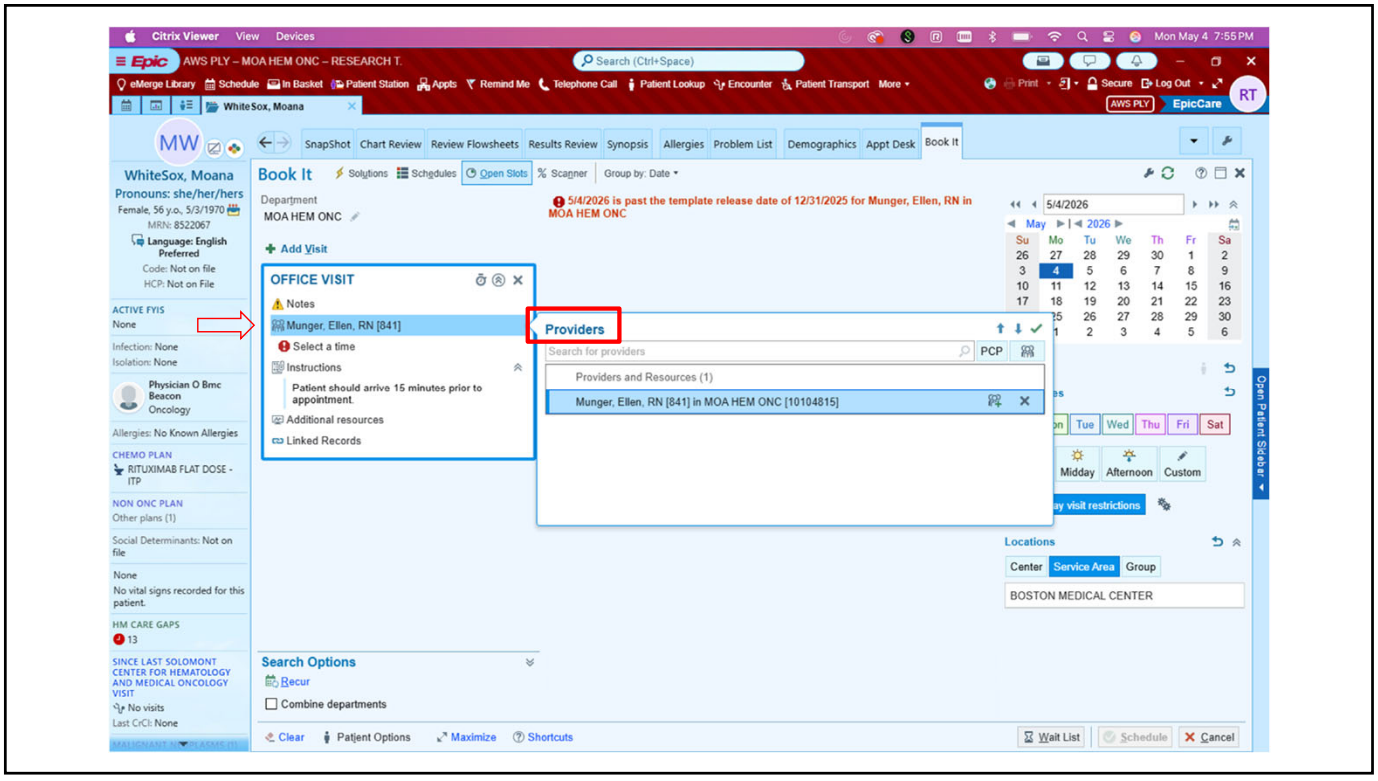


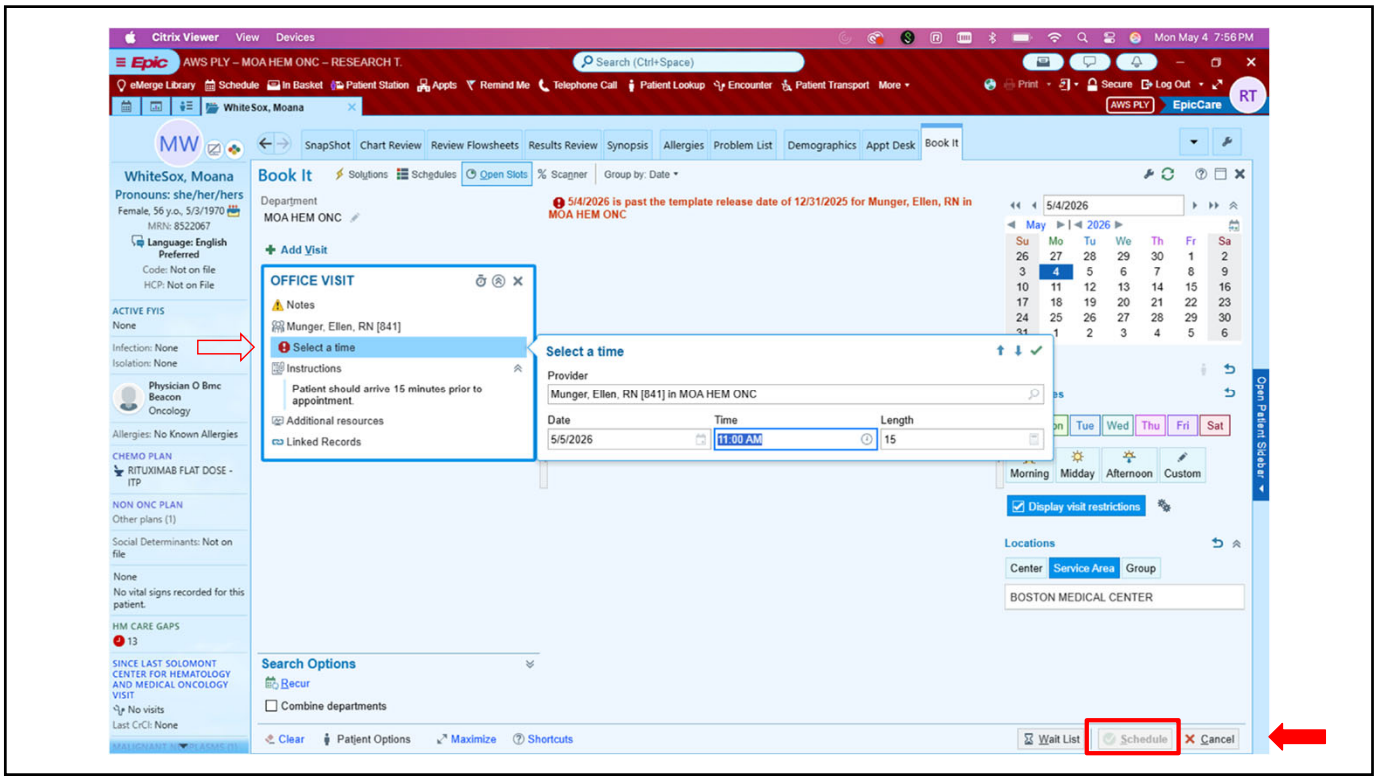
10


Book It
Department
MOA HEM ONC
Add Visit
NEW VISIT
Notes
Add a visit type
Add a provider
Linked Records
Visit Type
Click the stars or press Alt+Shift+F while on selected Visit Type in Visit Type lookup to add favorite visits in this department for quick selection.
Add providers to search for open slots
Search Options
Recur
Combine departments
Locations
Center
Service Area
Group

11


Book It
Department
MOA HEM ONC
5/4/2026 is past the template release date of 12/31/2025 for Munger, Ellen, RN in MOA HEM ONC
Add Visit
OFFICE VISIT
Notes
Munger, Ellen, RN [841]
Select a time
Instructions
Patient should arrive 15 minutes prior to appointment.
Additional resources
Linked Records
Providers
Search for providers
PCP
Providers and Resources (1)
Munger, Ellen, RN [841] in MOA HEM ONC [10104815]
Locations
Center
Service Area
Group
BOSTON MEDICAL CENTER
Search Options
Recur
Combine departments

12



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Communicating with the care team

Improves coordination and reduces missed information

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Considerations

- Ensure messages are concise and actionable
- Ensure any important detail is also recorded on a different platform as the secure chat messages get deleted after a week

Applications

- Include appropriate recipients to ensure the entire clinical team receives updates in real time

  Example- Include the investigative pharmacy team to inform them about treatment clearance to ensure smooth release of investigational products

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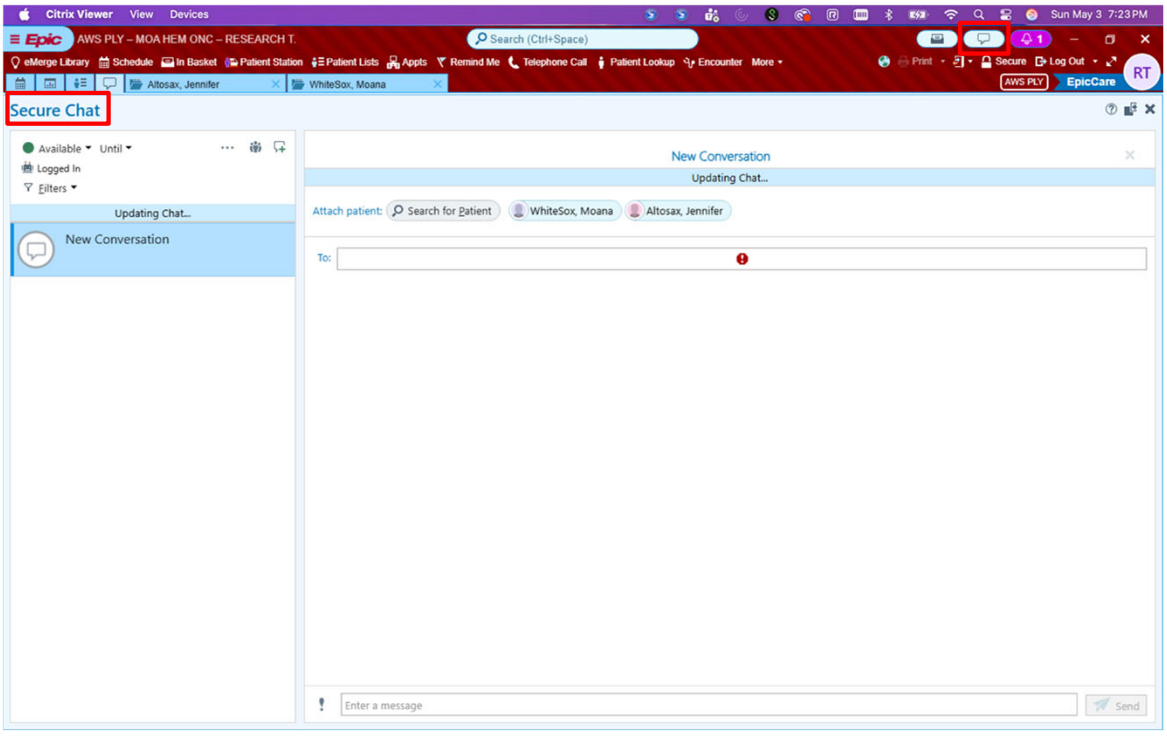
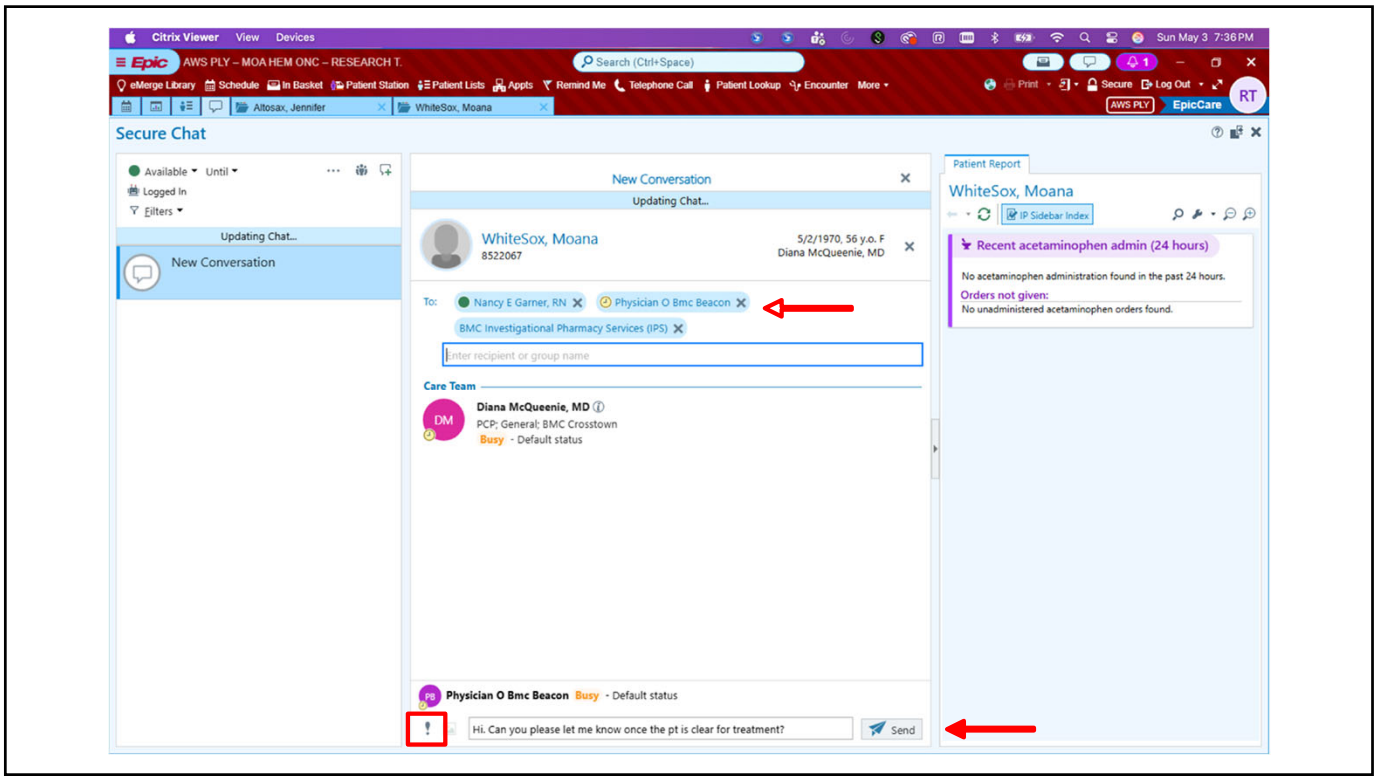


16


Secure Chat
New Conversation
Updating Chat...
WhiteSox, Moana
8522067
5/2/1970, 56 y.o. F
Diana McQueenie, MD
To:
Nancy E Garner, RN
Physician O Bmc Beacon
BMC Investigational Pharmacy Services (IPS)
Enter recipient or group name
Care Team
Diana McQueenie, MD
PCP; General; BMC Crosstown
Busy - Default status
Patient Report
WhiteSox, Moana
Recent acetaminophen admin (24 hours)
No acetaminophen administration found in the past 24 hours.
Orders not given:
No unadministered acetaminophen orders found.
Physician O Bmc Beacon Busy - Default status
Hi. Can you please let me know once the pt is clear for treatment?
Send

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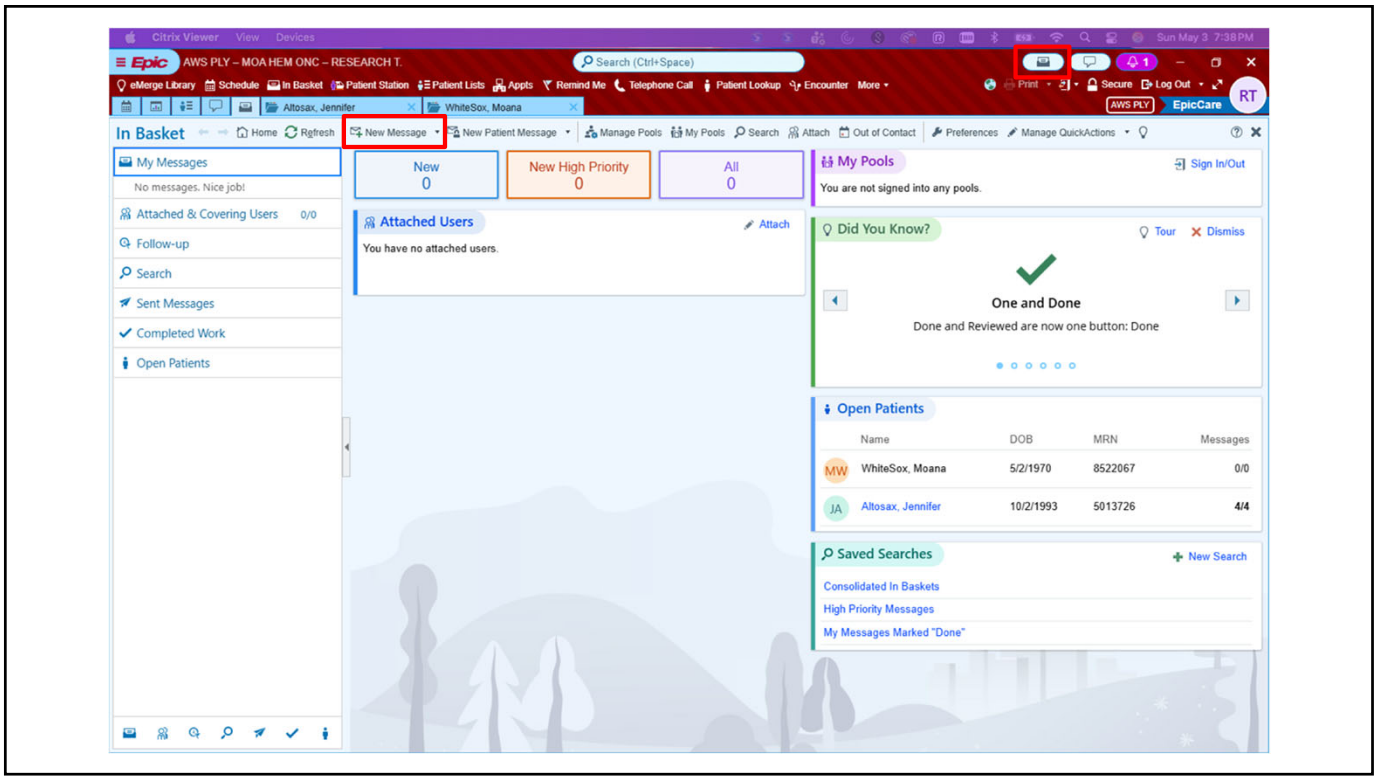
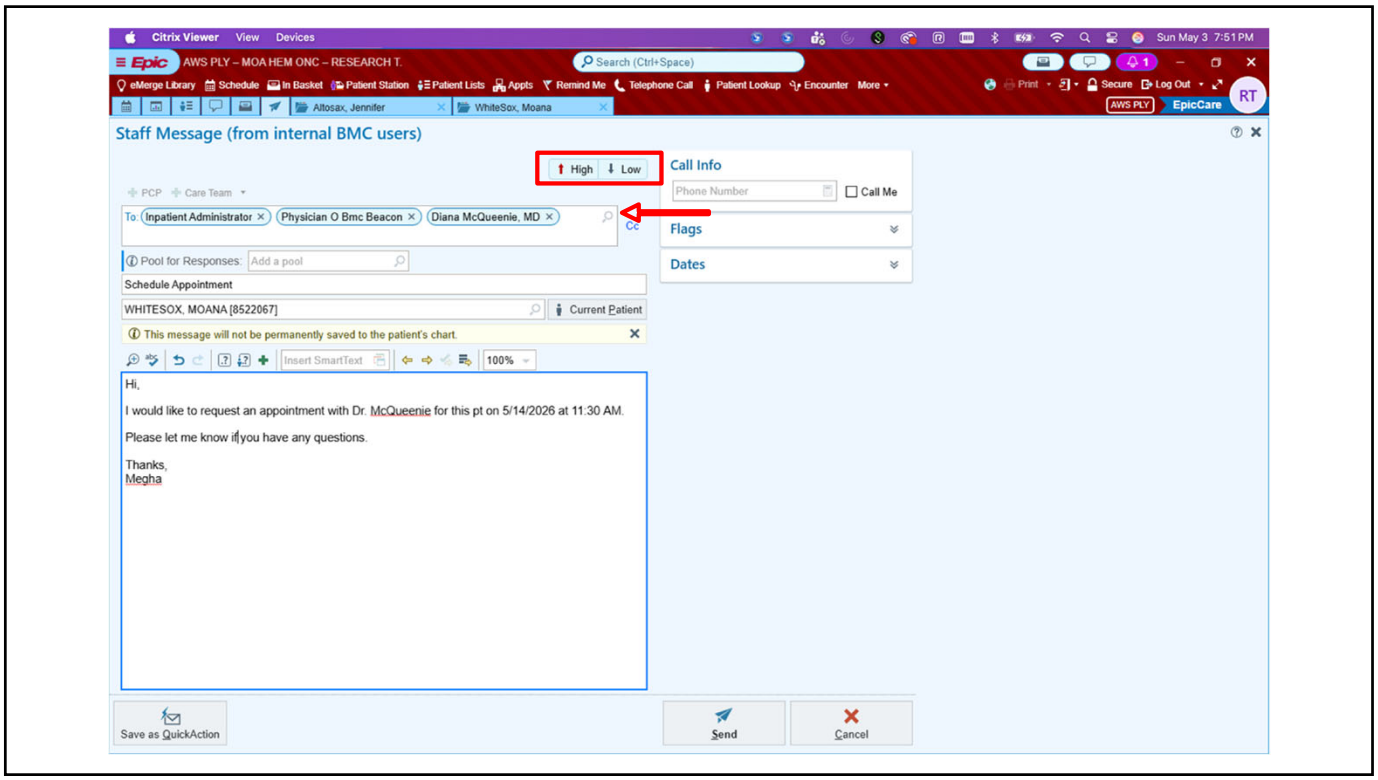

In Basket
New Message
My Messages
No messages. Nice job!
Attached & Covering Users 0/0
Follow-up
Search
Sent Messages
Completed Work
Open Patients
New 0
New High Priority 0
All 0
Attached Users
You have no attached users.
My Pools
You are not signed into any pools.
Did You Know?
One and Done
Done and Reviewed are now one button: Done
Open Patients
Name
DOB
MRN
Messages
WhiteSox, Moana
5/2/1970
8522067
0/0
Altosax, Jennifer
10/2/1993
5013726
4/4
Saved Searches
Consolidated In Baskets
High Priority Messages
My Messages Marked "Done"

18



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Patient Lists

Central hub to track and manage patients efficiently

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Considerations

- Keep lists updated and role-specific
- Be mindful of visibility/privacy when sharing lists across teams
- Standardize naming conventions for consistency

Applications

- Track enrolled and screened participants
- Organize patients by protocol, cohort, or treatment arm
- Support recruitment and retention workflows

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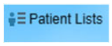
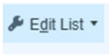
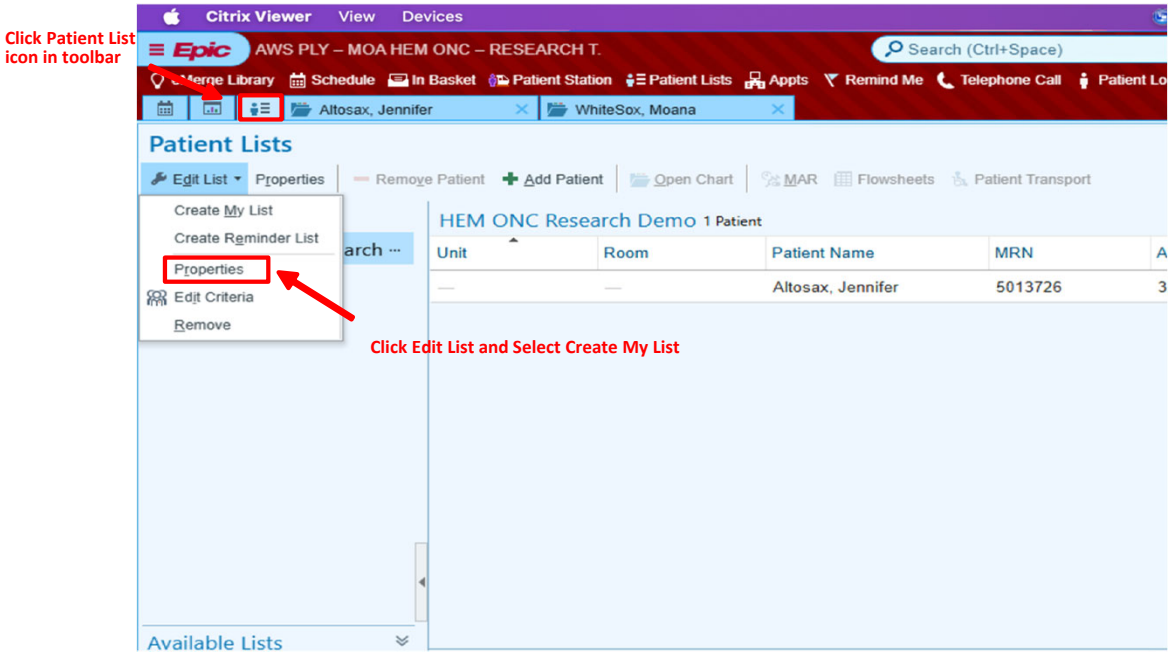
How to create custom patient list

1. Open Patient List in toolbar 

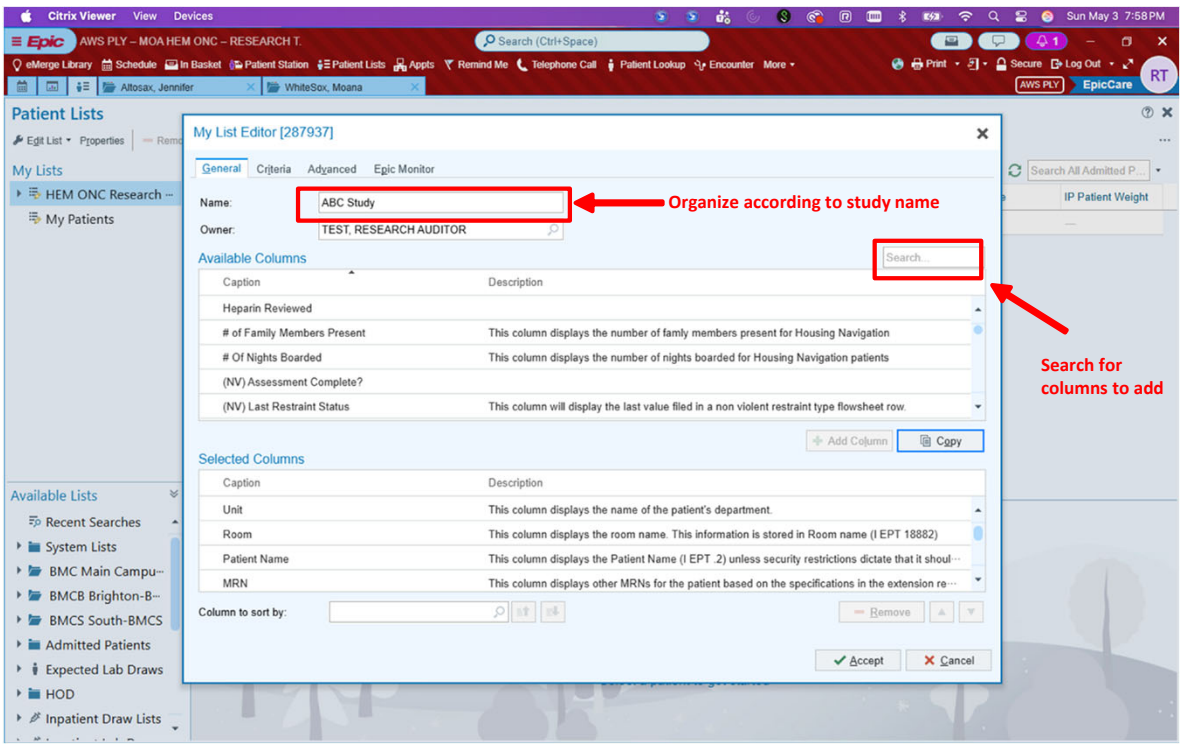
2. Click arrow next to wrench icon 

3. From dropdown, select Create My List
4. Name your list
5. In search box, search for data columns you want to add (MRN, age, etc)
6. Click Add Column
    a. You should now see the data you just selected, add to the bottom section of Selected Columns
7. Once you have added all of the columns/data of choice, click Accept

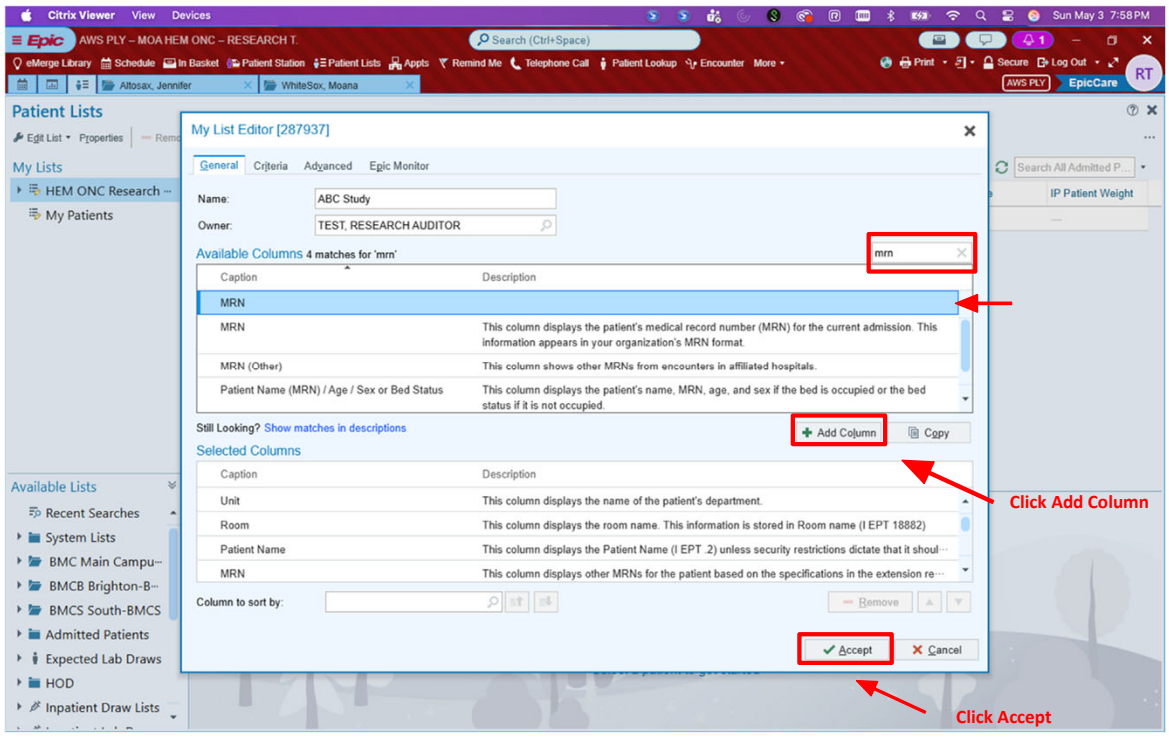
22


Click Patient List icon in toolbar
Citrix Viewer View Devices
AWS PLY – MOA HEM ONC – RESEARCH T.
Search (Ctrl+Space)
Schedule
In Basket
Patient Station
Patient Lists
Appts
Remind Me
Telephone Call
Altosax, Jennifer
WhiteSox, Moana
Patient Lists
Edit List
Properties
Remove Patient
Add Patient
Open Chart
MAR
Flowsheets
Patient Transport
Create My List
Create Reminder List
Properties
Edit Criteria
Remove
Click Edit List and Select Create My List
HEM ONC Research Demo 1 Patient
Unit
Room
Patient Name
MRN
Altosax, Jennifer
5013726
Available Lists

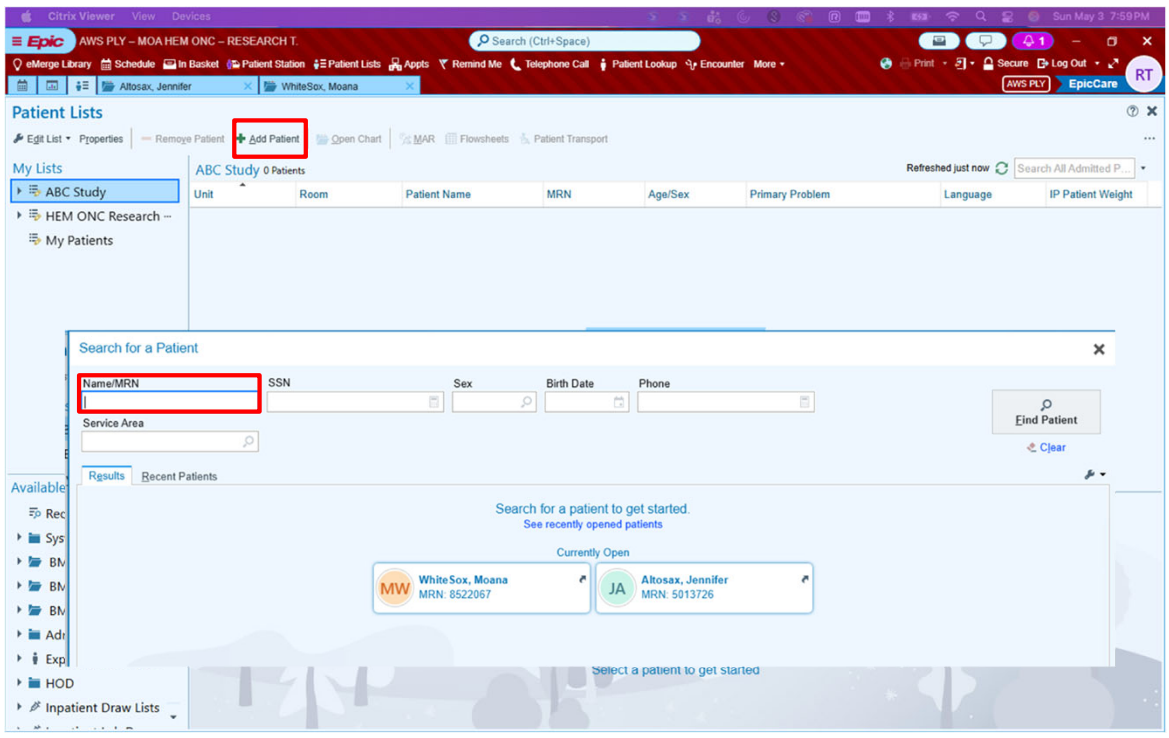
23


My List Editor [287937]
General
Criteria
Advanced
Epic Monitor
Name:
ABC Study
Organize according to study name
Owner:
TEST, RESEARCH AUDITOR
Available Columns
Search...
Caption
Description
Heparin Reviewed
# of Family Members Present
This column displays the number of famly members present for Housing Navigation
Of Nights Boarded
This column displays the number of nights boarded for Housing Navigation patients
(NV) Assessment Complete?
(NV) Last Restraint Status
This column will display the last value filed in a non violent restraint type flowsheet row.
Add Column
Copy
Search for columns to add
Selected Columns
Unit
This column displays the name of the patient's department.
Room
This column displays the room name. This information is stored in Room name (I EPT 18882)
Patient Name
This column displays the Patient Name (I EPT .2) unless security restrictions dictate that it shoul
MRN
This column displays other MRNs for the patient based on the specifications in the extension re
Column to sort by:
Remove
Accept
Cancel
Patient Lists
My Lists
HEM ONC Research
My Patients
Available Lists
Recent Searches
System Lists
Admitted Patients
Expected Lab Draws
HOD
Inpatient Draw Lists

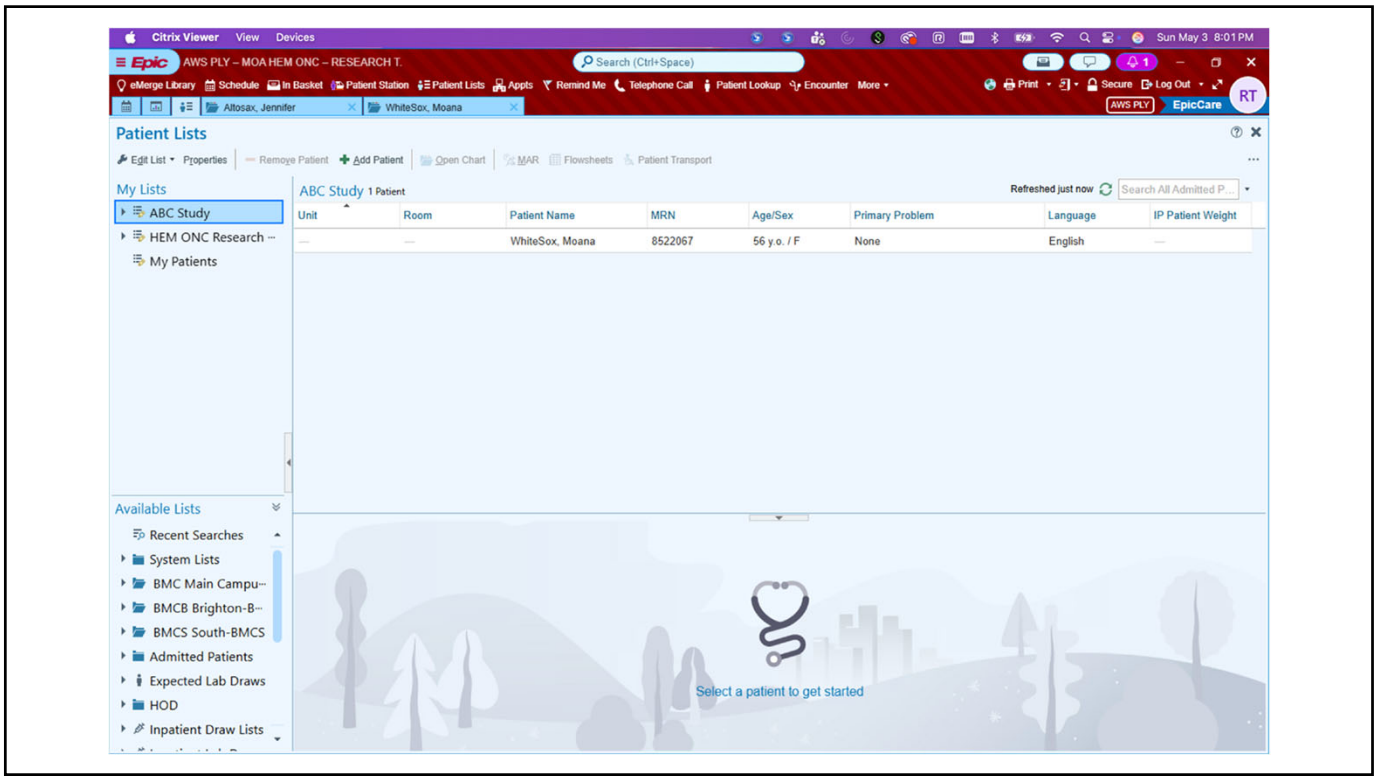
24


Patient Lists
My List Editor [287937]
General
Criteria
Advanced
Epic Monitor
Name:
ABC Study
Owner:
TEST, RESEARCH AUDITOR
Available Columns 4 matches for 'mrn'
mrn
Caption
Description
MRN
MRN
This column displays the patient's medical record number (MRN) for the current admission. This information appears in your organization's MRN format.
MRN (Other)
This column shows other MRNs from encounters in affiliated hospitals.
Patient Name (MRN) / Age / Sex or Bed Status
This column displays the patient's name, MRN, age, and sex if the bed is occupied or the bed status if it is not occupied.
Still Looking? Show matches in descriptions
Add Column
Copy
Selected Columns
Unit
This column displays the name of the patient's department.
Room
This column displays the room name. This information is stored in Room name (I EPT 18882)
Patient Name
This column displays the Patient Name (I EPT .2) unless security restrictions dictate that it shoul
MRN
This column displays other MRNs for the patient based on the specifications in the extension re
Column to sort by:
Remove
Accept
Cancel
Click Add Column
Click Accept

25


Patient Lists
Edit List
Properties
Remove Patient
Add Patient
Open Chart
MAR
Flowsheets
Patient Transport
My Lists
ABC Study 0 Patients
Refreshed just now
Unit
Room
Patient Name
MRN
Age/Sex
Primary Problem
Language
IP Patient Weight
Search for a Patient
Name/MRN
SSN
Sex
Birth Date
Phone
Service Area
Find Patient
Clear
Results
Recent Patients
Search for a patient to get started.
See recently opened patients
Currently Open
WhiteSox, Moana
MRN: 8522067
Altosax, Jennifer
MRN: 5013726
Select a patient to get started

26


Patient Lists
My Lists
ABC Study
HEM ONC Research
My Patients
ABC Study 1 Patient
Unit
Room
Patient Name
MRN
Age/Sex
Primary Problem
Language
IP Patient Weight
WhiteSox, Moana
8522067
56 y.o. / F
None
English
Available Lists
Recent Searches
System Lists
BMC Main Campu
BMCB Brighton-B
BMCS South-BMCS
Admitted Patients
Expected Lab Draws
HOD
Inpatient Draw Lists
Select a patient to get started

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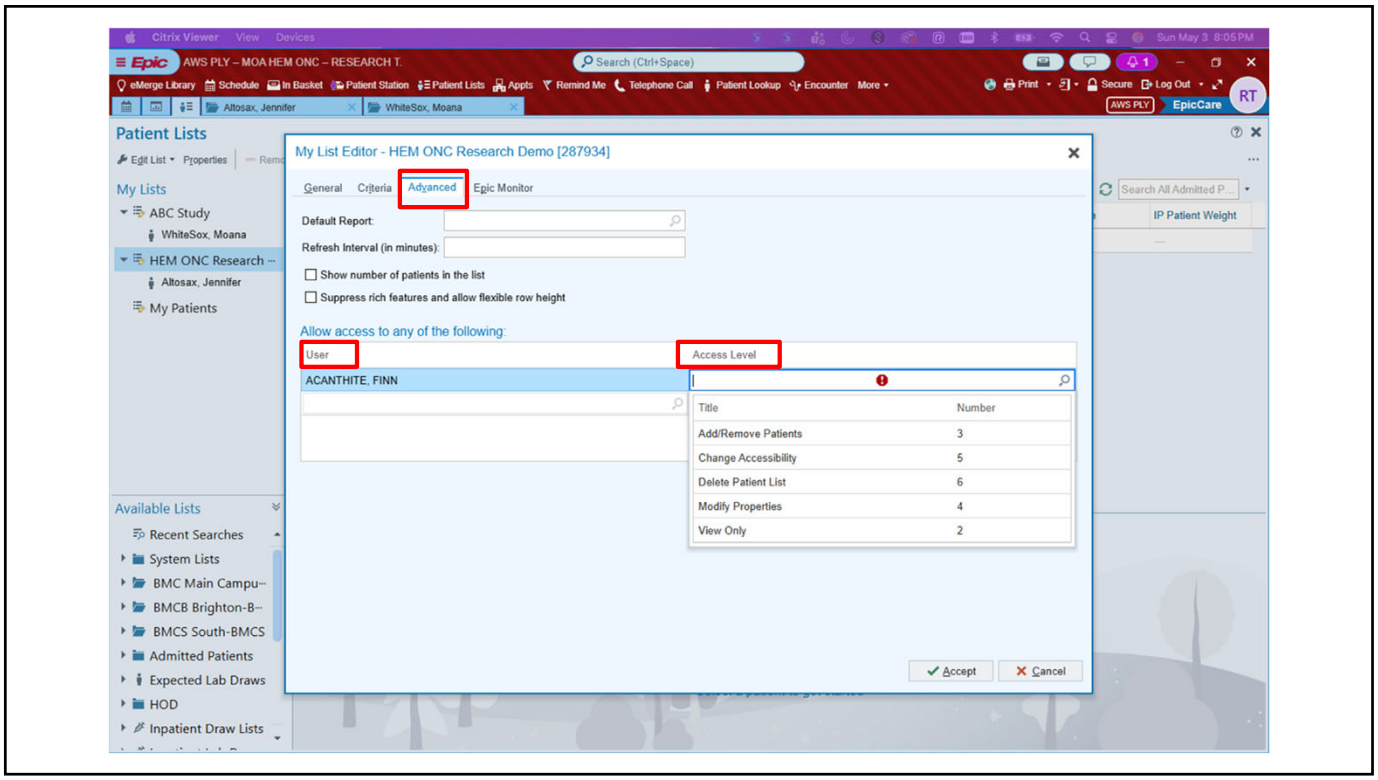
Patient Lists
My List Editor - HEM ONC Research Demo [287934]
General
Criteria
Advanced
Epic Monitor
Default Report:
Refresh Interval (in minutes):
Show number of patients in the list
Suppress rich features and allow flexible row height
Allow access to any of the following:
User
Access Level
ACANTHITE, FINN
Title
Number
Add/Remove Patients
3
Change Accessibility
5
Delete Patient List
6
Modify Properties
4
View Only
2
Accept
Cancel

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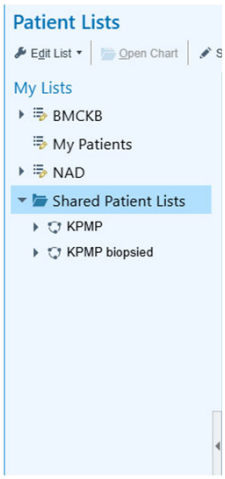
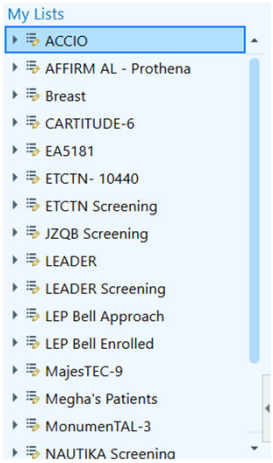
Examples





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Treatment Plan

Ensures accurate coordination of care and protocol adherence

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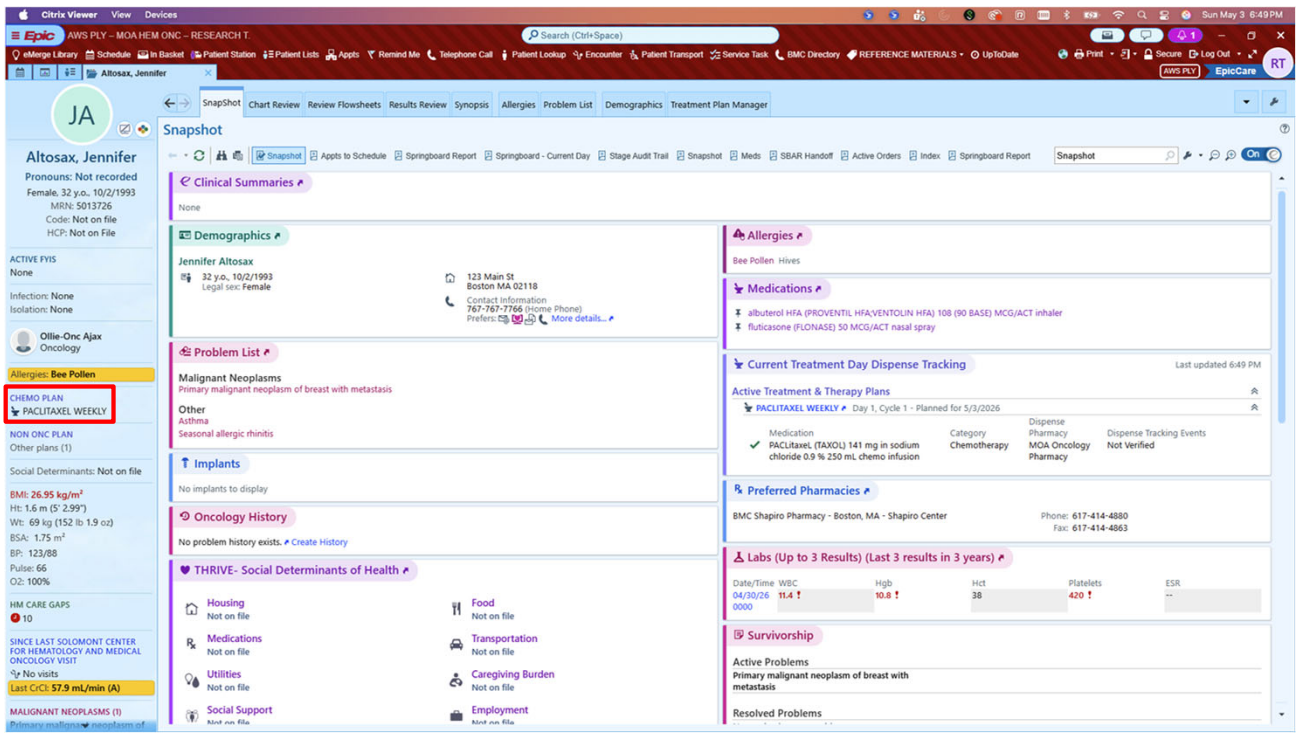
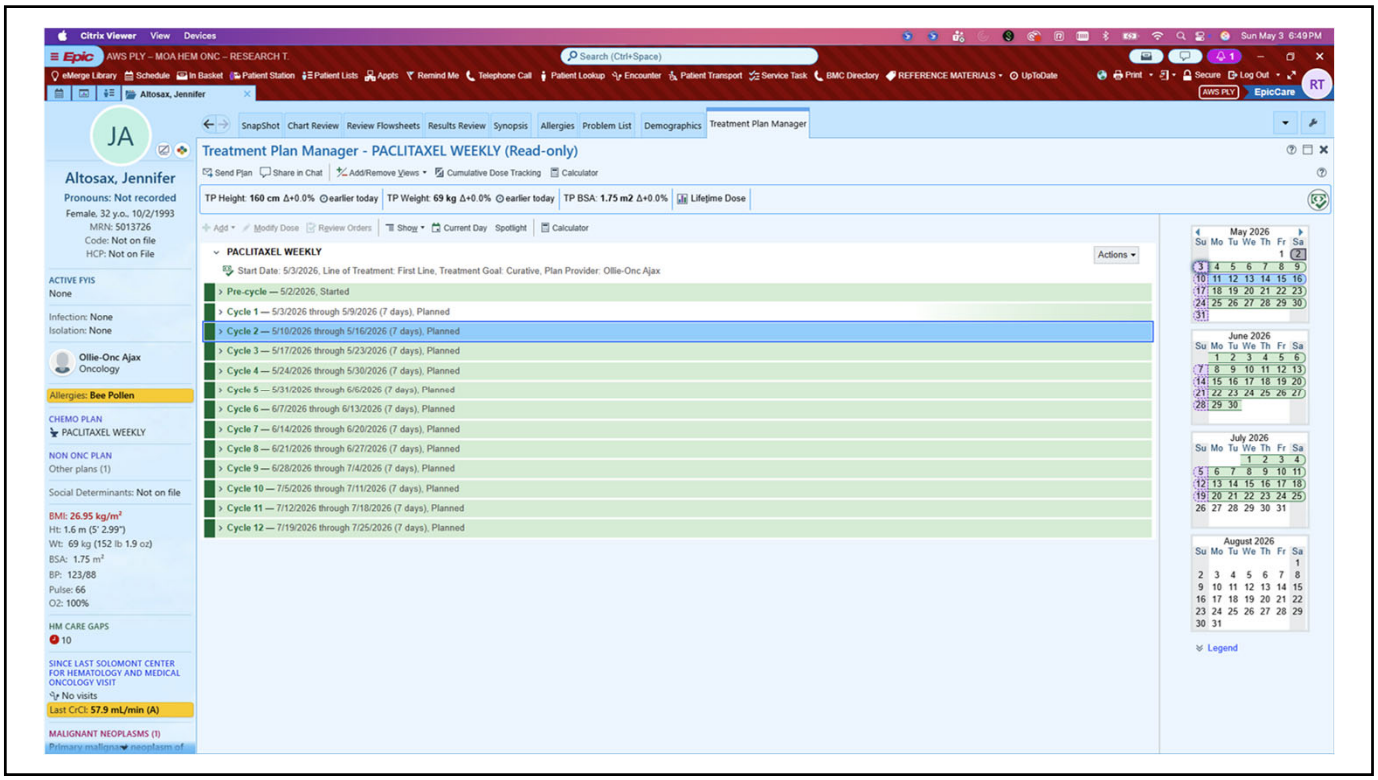
Research Applications

- It helps to verify the labs ordered and the treatment given
- Critical for ensuring adherence to study protocol

31



32


Treatment Plan Manager - PACLITAXEL WEEKLY (Read-only)
Altosax, Jennifer
PACLITAXEL WEEKLY
Cycle 1 — 5/3/2026 through 5/9/2026 (7 days), Planned
Cycle 2 — 5/10/2026 through 5/16/2026 (7 days), Planned
Cycle 3 — 5/17/2026 through 5/23/2026 (7 days), Planned
Cycle 4 — 5/24/2026 through 5/30/2026 (7 days), Planned
Cycle 5 — 5/31/2026 through 6/6/2026 (7 days), Planned
Cycle 6 — 6/7/2026 through 6/13/2026 (7 days), Planned
Cycle 7 — 6/14/2026 through 6/20/2026 (7 days), Planned
Cycle 8 — 6/21/2026 through 6/27/2026 (7 days), Planned
Cycle 9 — 6/28/2026 through 7/4/2026 (7 days), Planned
Cycle 10 — 7/5/2026 through 7/11/2026 (7 days), Planned
Cycle 11 — 7/12/2026 through 7/18/2026 (7 days), Planned
Cycle 12 — 7/19/2026 through 7/25/2026 (7 days), Planned

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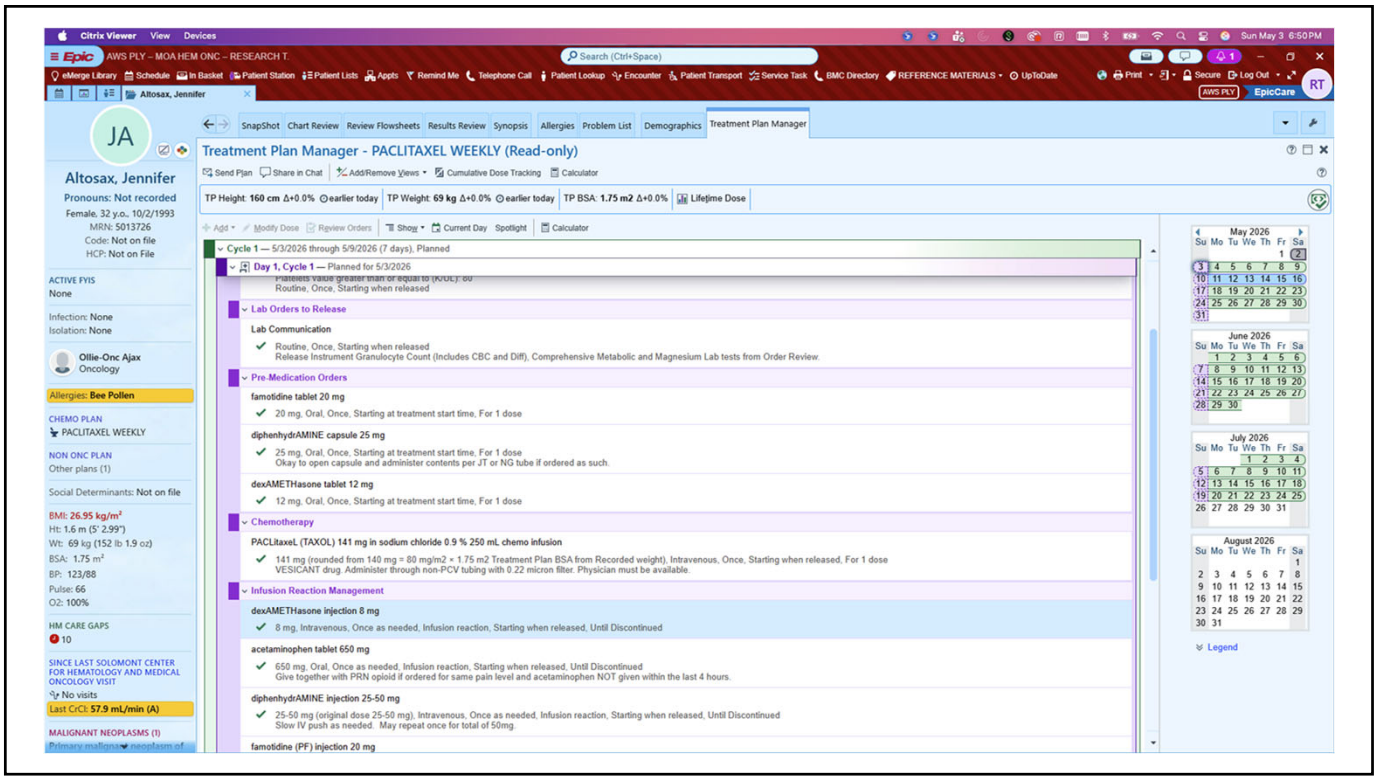
Treatment Plan Manager - PACLITAXEL WEEKLY (Read-only)
Altosax, Jennifer
Cycle 1 — 5/3/2026 through 5/9/2026 (7 days), Planned
Day 1, Cycle 1 — Planned for 5/3/2026
Lab Orders to Release
Lab Communication
Routine, Once, Starting when released
Release Instrument Granulocyte Count (Includes CBC and Diff), Comprehensive Metabolic and Magnesium Lab tests from Order Review.
Pre-Medication Orders
famotidine tablet 20 mg
20 mg, Oral, Once, Starting at treatment start time, For 1 dose
diphenhydrAMINE capsule 25 mg
25 mg, Oral, Once, Starting at treatment start time, For 1 dose
Okay to open capsule and administer contents per JT or NG tube if ordered as such.
dexAMETHasone tablet 12 mg
12 mg, Oral, Once, Starting at treatment start time, For 1 dose
Chemotherapy
PACLitaxeL (TAXOL) 141 mg in sodium chloride 0.9 % 250 mL chemo infusion
141 mg (rounded from 140 mg = 80 mg/m2 × 1.75 m2 Treatment Plan BSA from Recorded weight), Intravenous, Once, Starting when released, For 1 dose
VESICANT drug. Administer through non-PCV tubing with 0.22 micron filter. Physician must be available.
Infusion Reaction Management
dexAMETHasone injection 8 mg
8 mg, Intravenous, Once as needed, Infusion reaction, Starting when released, Until Discontinued
acetaminophen tablet 650 mg
650 mg, Oral, Once as needed, Infusion reaction, Starting when released, Until Discontinued
Give together with PRN opioid if ordered for same pain level and acetaminophen NOT given within the last 4 hours.
diphenhydrAMINE injection 25-50 mg
25-50 mg (original dose 25-50 mg), Intravenous, Once as needed, Infusion reaction, Starting when released, Until Discontinued
Slow IV push as needed. May repeat once for total of 50mg.
famotidine (PF) injection 20 mg

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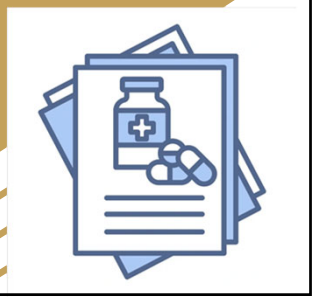
Drug Administration Information

Critical for verifying treatment delivery and documentation



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Dual verification

- 2 RNs verify label on bag and EPIC order
- Administration information can be found within the order (Converts dose to mL)
- Adds layer of safety for Investigational Products

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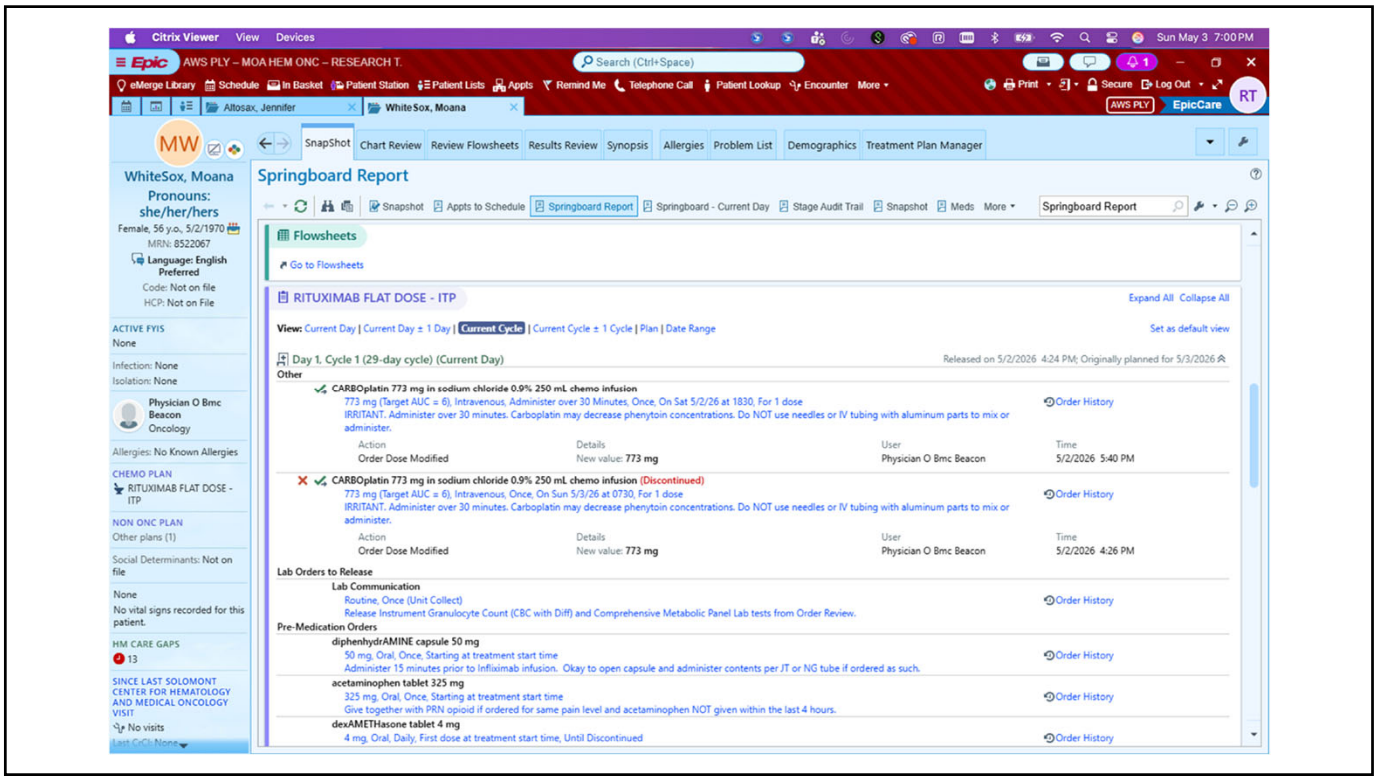
Springboard Report
WhiteSox, Moana
Pronouns: she/her/hers
Female, 56 y.o., 5/2/1970
MRN: 8522067
Language: English Preferred
Code: Not on file
HCP: Not on File
Flowsheets
Go to Flowsheets
RITUXIMAB FLAT DOSE - ITP
Expand All Collapse All
View: Current Day | Current Day ± 1 Day | Current Cycle | Current Cycle ± 1 Cycle | Plan | Date Range
Set as default view
Day 1, Cycle 1 (29-day cycle) (Current Day)
Released on 5/2/2026 4:24 PM; Originally planned for 5/3/2026
Other
CARBOplatin 773 mg in sodium chloride 0.9% 250 mL chemo infusion
773 mg (Target AUC = 6), Intravenous, Administer over 30 Minutes, Once, On Sat 5/2/26 at 1830, For 1 dose
IRRITANT. Administer over 30 minutes. Carboplatin may decrease phenytoin concentrations. Do NOT use needles or IV tubing with aluminum parts to mix or administer.
Action: Order Dose Modified
Details: New value: 773 mg
User: Physician O Bmc Beacon
Time: 5/2/2026 5:40 PM
CARBOplatin 773 mg in sodium chloride 0.9% 250 mL chemo infusion (Discontinued)
773 mg (Target AUC = 6), Intravenous, Once, On Sun 5/3/26 at 0730, For 1 dose
IRRITANT. Administer over 30 minutes. Carboplatin may decrease phenytoin concentrations. Do NOT use needles or IV tubing with aluminum parts to mix or administer.
Action: Order Dose Modified
Details: New value: 773 mg
User: Physician O Bmc Beacon
Time: 5/2/2026 4:26 PM
Lab Orders to Release
Lab Communication
Routine, Once (Unit Collect)
Release Instrument Granulocyte Count (CBC with Diff) and Comprehensive Metabolic Panel Lab tests from Order Review.
Pre-Medication Orders
diphenhydrAMINE capsule 50 mg
50 mg, Oral, Once, Starting at treatment start time
Administer 15 minutes prior to Infliximab infusion. Okay to open capsule and administer contents per JT or NG tube if ordered as such.
acetaminophen tablet 325 mg
325 mg, Oral, Once, Starting at treatment start time
Give together with PRN opioid if ordered for same pain level and acetaminophen NOT given within the last 4 hours.
dexAMETHasone tablet 4 mg
4 mg, Oral, Daily, First dose at treatment start time, Until Discontinued
Order History

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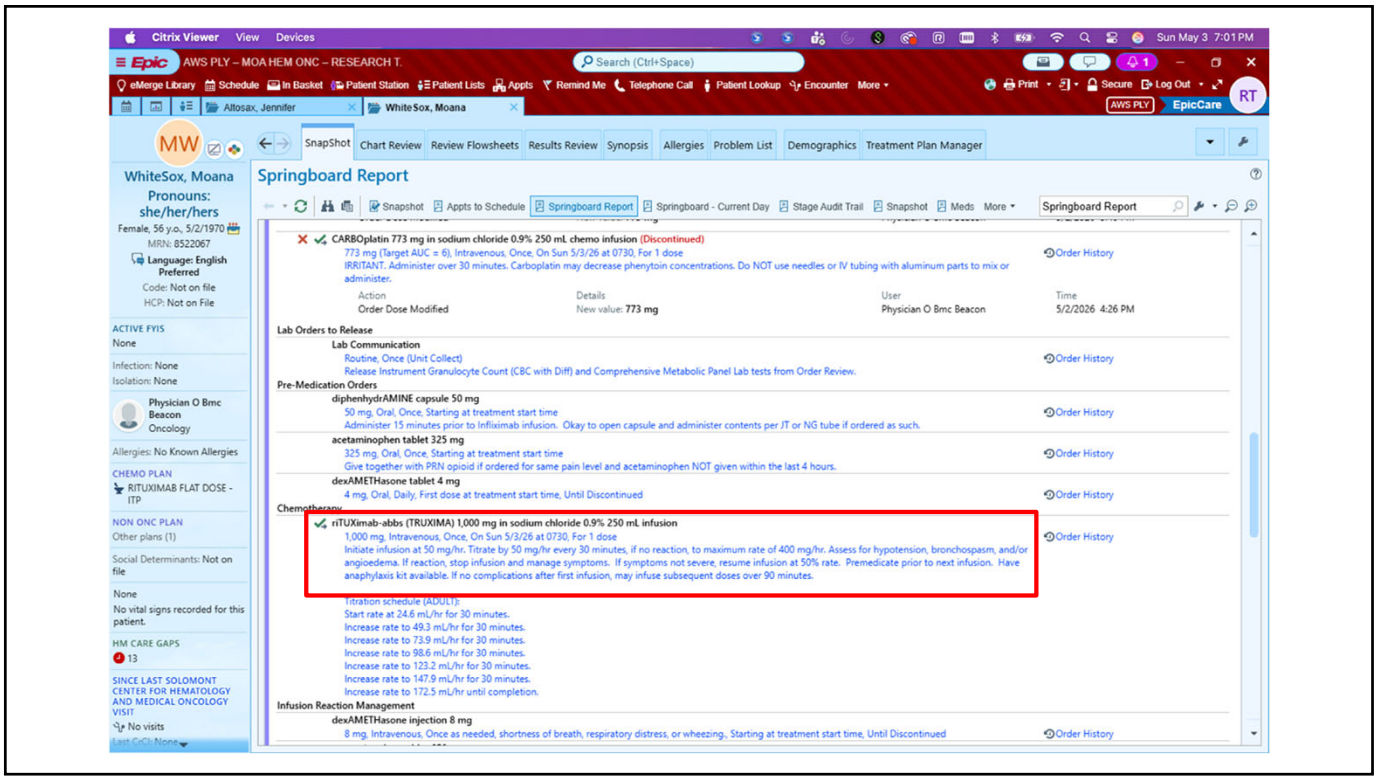
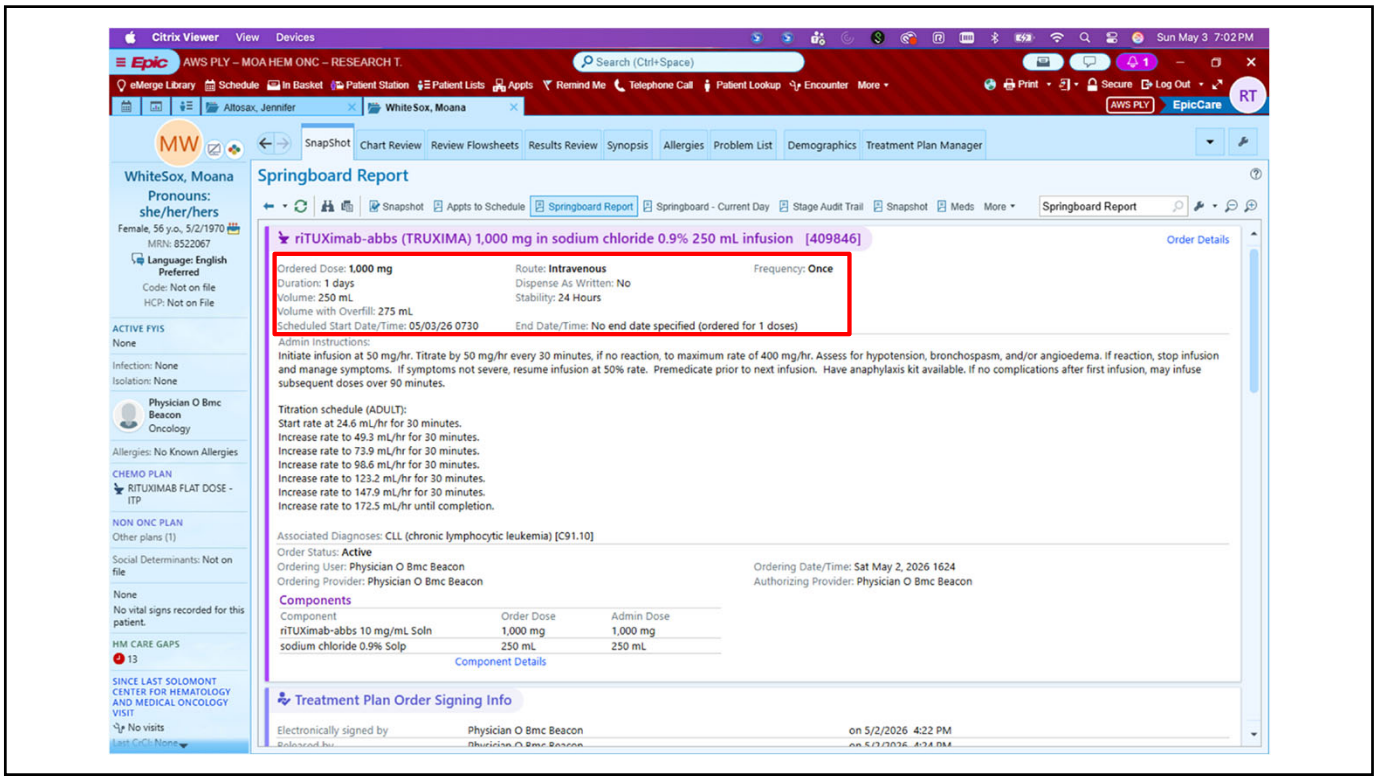

Springboard Report
WhiteSox, Moana
Pronouns: she/her/hers
Female, 56 y.o., 5/2/1970
MRN: 8522067
Language: English Preferred
Code: Not on file
HCP: Not on File
CARBOplatin 773 mg in sodium chloride 0.9% 250 mL chemo infusion (Discontinued)
773 mg (Target AUC = 6), Intravenous, Once, On Sun 5/3/26 at 0730, For 1 dose
IRRITANT. Administer over 30 minutes. Carboplatin may decrease phenytoin concentrations. Do NOT use needles or IV tubing with aluminum parts to mix or administer.
Action: Order Dose Modified
Details: New value: 773 mg
User: Physician O Bmc Beacon
Time: 5/2/2026 4:26 PM
Lab Orders to Release
Lab Communication
Routine, Once (Unit Collect)
Release Instrument Granulocyte Count (CBC with Diff) and Comprehensive Metabolic Panel Lab tests from Order Review.
Pre-Medication Orders
diphenhydrAMINE capsule 50 mg
50 mg, Oral, Once, Starting at treatment start time
Administer 15 minutes prior to Infliximab infusion. Okay to open capsule and administer contents per JT or NG tube if ordered as such.
acetaminophen tablet 325 mg
325 mg, Oral, Once, Starting at treatment start time
Give together with PRN opioid if ordered for same pain level and acetaminophen NOT given within the last 4 hours.
dexAMETHasone tablet 4 mg
4 mg, Oral, Daily, First dose at treatment start time, Until Discontinued
Chemotherapy
riTUXimab-abbs (TRUXIMA) 1,000 mg in sodium chloride 0.9% 250 mL infusion
1,000 mg, Intravenous, Once, On Sun 5/3/26 at 0730, For 1 dose
Initiate infusion at 50 mg/hr. Titrate by 50 mg/hr every 30 minutes, if no reaction, to maximum rate of 400 mg/hr. Assess for hypotension, bronchospasm, and/or angioedema. If reaction, stop infusion and manage symptoms. If symptoms not severe, resume infusion at 50% rate. Premedicate prior to next infusion. Have anaphylaxis kit available. If no complications after first infusion, may infuse subsequent doses over 90 minutes.
Titration schedule (ADULT):
Start rate at 24.6 mL/hr for 30 minutes.
Increase rate to 49.3 mL/hr for 30 minutes.
Increase rate to 73.9 mL/hr for 30 minutes.
Increase rate to 98.6 mL/hr for 30 minutes.
Increase rate to 123.2 mL/hr for 30 minutes.
Increase rate to 147.9 mL/hr for 30 minutes.
Increase rate to 172.5 mL/hr until completion.
Infusion Reaction Management
dexAMETHasone injection 8 mg
8 mg, Intravenous, Once as needed, shortness of breath, respiratory distress, or wheezing., Starting at treatment start time, Until Discontinued
Order History

38


Springboard Report
riTUXimab-abbs (TRUXIMA) 1,000 mg in sodium chloride 0.9% 250 mL infusion [409846]
Ordered Dose: 1,000 mg
Route: Intravenous
Frequency: Once
Duration: 1 days
Dispense As Written: No
Volume: 250 mL
Stability: 24 Hours
Volume with Overfill: 275 mL
Scheduled Start Date/Time: 05/03/26 0730
End Date/Time: No end date specified (ordered for 1 doses)
Admin Instructions:
Initiate infusion at 50 mg/hr. Titrate by 50 mg/hr every 30 minutes, if no reaction, to maximum rate of 400 mg/hr. Assess for hypotension, bronchospasm, and/or angioedema. If reaction, stop infusion and manage symptoms. If symptoms not severe, resume infusion at 50% rate. Premedicate prior to next infusion. Have anaphylaxis kit available. If no complications after first infusion, may infuse subsequent doses over 90 minutes.
Titration schedule (ADULT):
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Increase rate to 49.3 mL/hr for 30 minutes.
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Increase rate to 98.6 mL/hr for 30 minutes.
Increase rate to 123.2 mL/hr for 30 minutes.
Increase rate to 147.9 mL/hr for 30 minutes.
Increase rate to 172.5 mL/hr until completion.
Associated Diagnoses: CLL (chronic lymphocytic leukemia) [C91.10]
Order Status: Active
Ordering User: Physician O Bmc Beacon
Ordering Provider: Physician O Bmc Beacon
Ordering Date/Time: Sat May 2, 2026 1624
Authorizing Provider: Physician O Bmc Beacon
Components
Component
Order Dose
Admin Dose
riTUXimab-abbs 10 mg/mL Soln
1,000 mg
1,000 mg
sodium chloride 0.9% Solp
250 mL
250 mL
Component Details
Treatment Plan Order Signing Info
Electronically signed by
Physician O Bmc Beacon
on 5/2/2026 4:22 PM

39

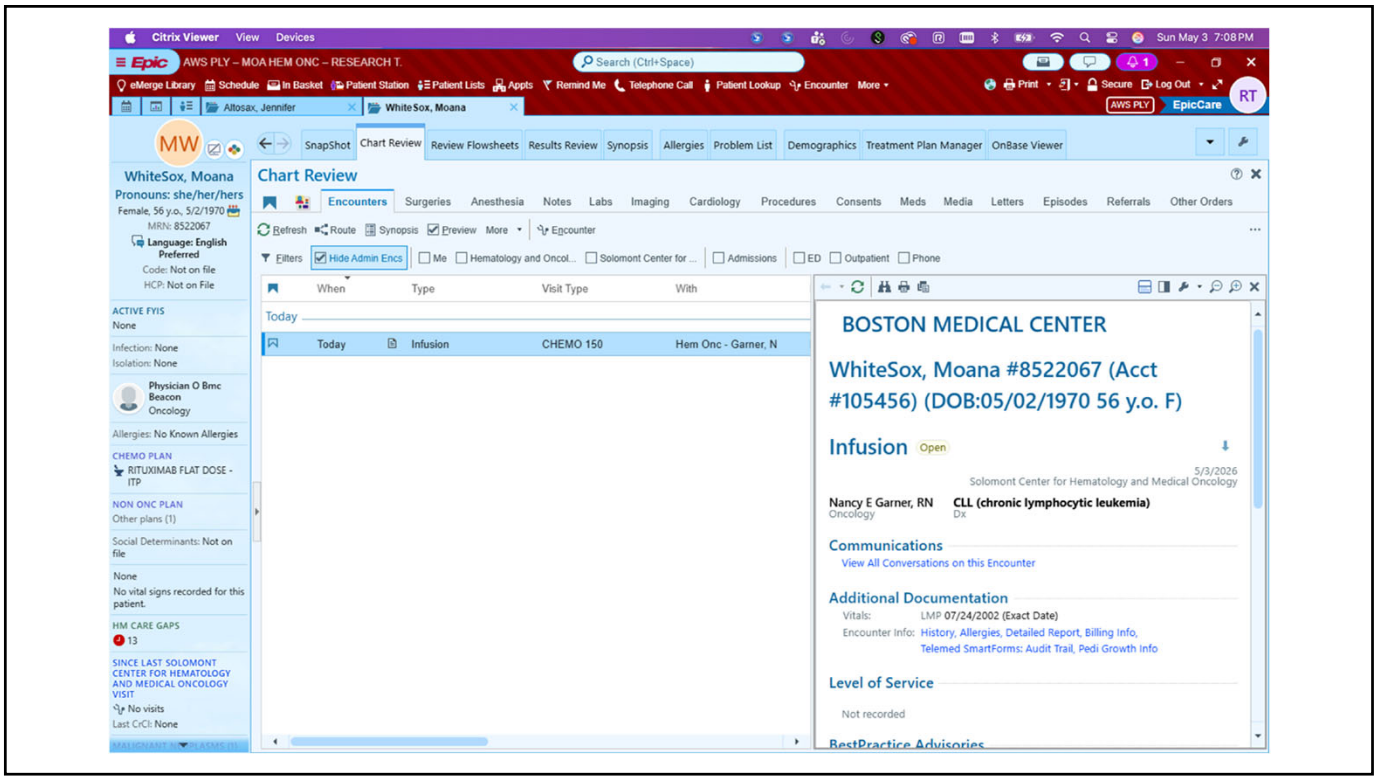
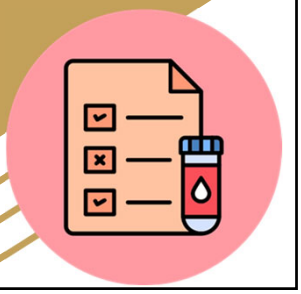


Chart Review
BOSTON MEDICAL CENTER
WhiteSox, Moana #8522067 (Acct #105456) (DOB:05/02/1970 56 y.o. F)
Infusion
Open
5/3/2026
Solomont Center for Hematology and Medical Oncology
Nancy E Garner, RN
Oncology
CLL (chronic lymphocytic leukemia)
Dx
Communications
View All Conversations on this Encounter
Additional Documentation
Vitals:
LMP 07/24/2002 (Exact Date)
Encounter Info:
History, Allergies, Detailed Report, Billing Info,
Telemed SmartForms: Audit Trail, Pedi Growth Info
Level of Service
Not recorded
BestPractice Advisories

40

Lab Results

Supports clinical decisions and protocol monitoring

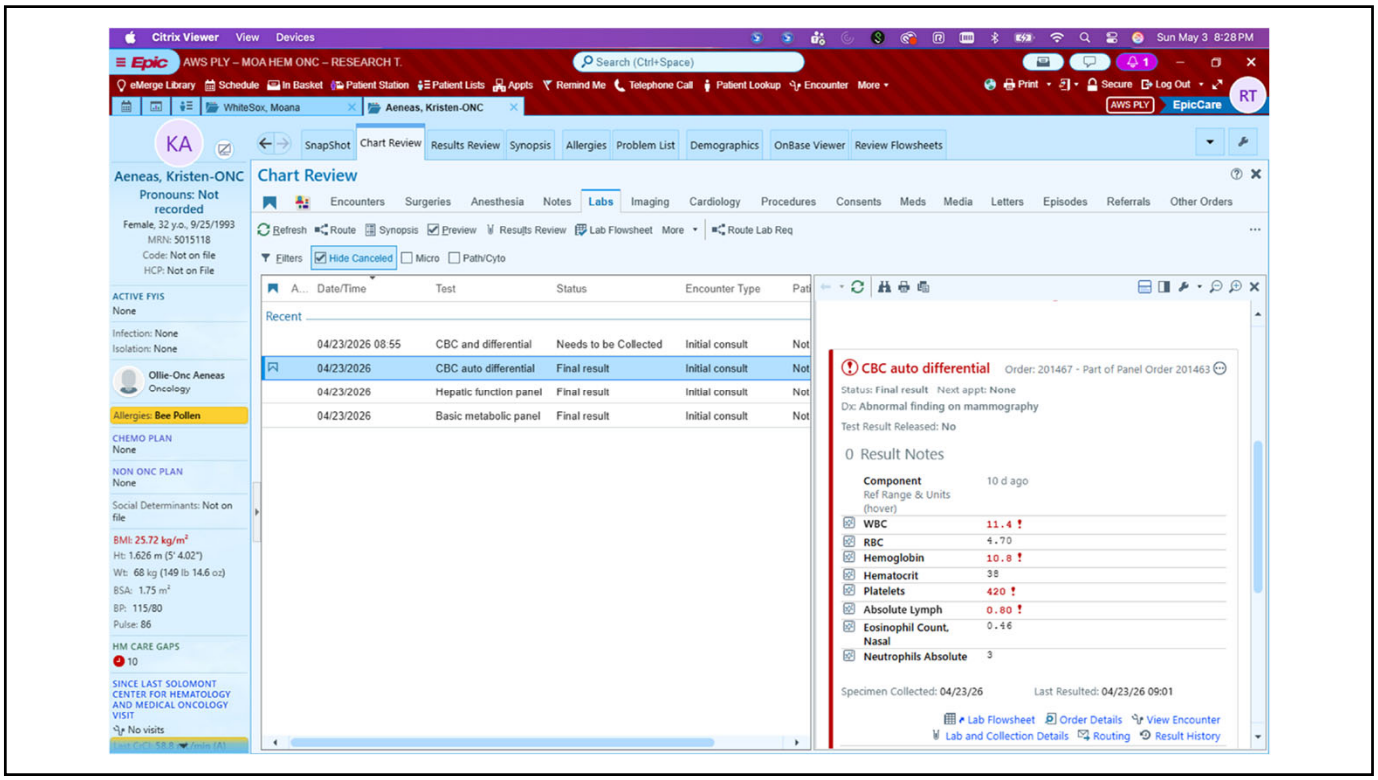


41

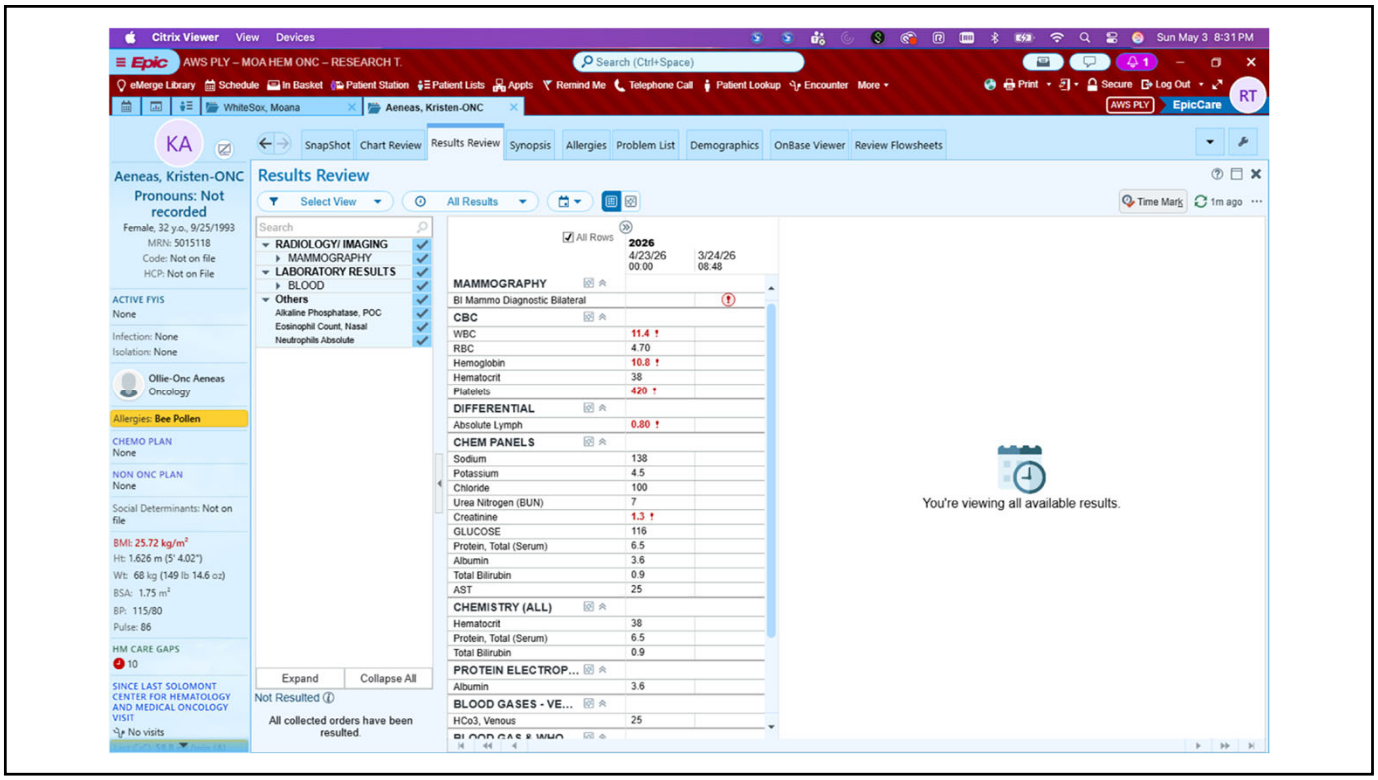
Clinical and research application

- Eligibility review
- Longitudinal tracking
- Extracting laboratory values for data entry/eCRFs
- Patient safety monitoring

42


Citrix Viewer View Devices
Sun May 3 8:28 PM
AWS PLY – MOA HEM ONC – RESEARCH T.
Search (Ctrl+Space)
eMerge Library Schedule In Basket Patient Station Patient Lists Appts Remind Me Telephone Call Patient Lookup Encounter More
Print Secure Log Out
AWS PLY EpicCare
WhiteSox, Moana
Aeneas, Kristen-ONC
SnapShot Chart Review Results Review Synopsis Allergies Problem List Demographics OnBase Viewer Review Flowsheets
Aeneas, Kristen-ONC
Pronouns: Not recorded
Female, 32 y.o., 9/25/1993
MRN: 5015118
Code: Not on file
HCP: Not on File
ACTIVE FYIS
None
Infection: None
Isolation: None
Ollie-Onc Aeneas
Oncology
Allergies: Bee Pollen
CHEMO PLAN
None
NON ONC PLAN
None
Social Determinants: Not on file
BMI: 25.72 kg/m²
Ht: 1.626 m (5' 4.02")
Wt: 68 kg (149 lb 14.6 oz)
BSA: 1.75 m²
BP: 115/80
Pulse: 86
HM CARE GAPS
10
SINCE LAST SOLOMONT CENTER FOR HEMATOLOGY AND MEDICAL ONCOLOGY VISIT
No visits
Chart Review
Encounters Surgeries Anesthesia Notes Labs Imaging Cardiology Procedures Consents Meds Media Letters Episodes Referrals Other Orders
Refresh Route Synopsis Preview Results Review Lab Flowsheet More Route Lab Req
Filters Hide Canceled Micro Path/Cyto
A... Date/Time Test Status Encounter Type Pati
Recent
04/23/2026 08:55 CBC and differential Needs to be Collected Initial consult Not
04/23/2026 CBC auto differential Final result Initial consult Not
04/23/2026 Hepatic function panel Final result Initial consult Not
04/23/2026 Basic metabolic panel Final result Initial consult Not
CBC auto differential Order: 201467 - Part of Panel Order 201463
Status: Final result Next appt: None
Dx: Abnormal finding on mammography
Test Result Released: No
0 Result Notes
Component Ref Range & Units (hover) 10 d ago
WBC 11.4 !
RBC 4.70
Hemoglobin 10.8 !
Hematocrit 38
Platelets 420 !
Absolute Lymph 0.80 !
Eosinophil Count, Nasal 0.46
Neutrophils Absolute 3
Specimen Collected: 04/23/26 Last Resulted: 04/23/26 09:01
Lab Flowsheet Order Details View Encounter
Lab and Collection Details Routing Result History

43


Citrix Viewer View Devices
Sun May 3 8:31 PM
AWS PLY – MOA HEM ONC – RESEARCH T.
Search (Ctrl+Space)
eMerge Library Schedule In Basket Patient Station Patient Lists Appts Remind Me Telephone Call Patient Lookup Encounter More
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Ollie-Onc Aeneas
Oncology
Allergies: Bee Pollen
CHEMO PLAN
None
NON ONC PLAN
None
Social Determinants: Not on file
BMI: 25.72 kg/m²
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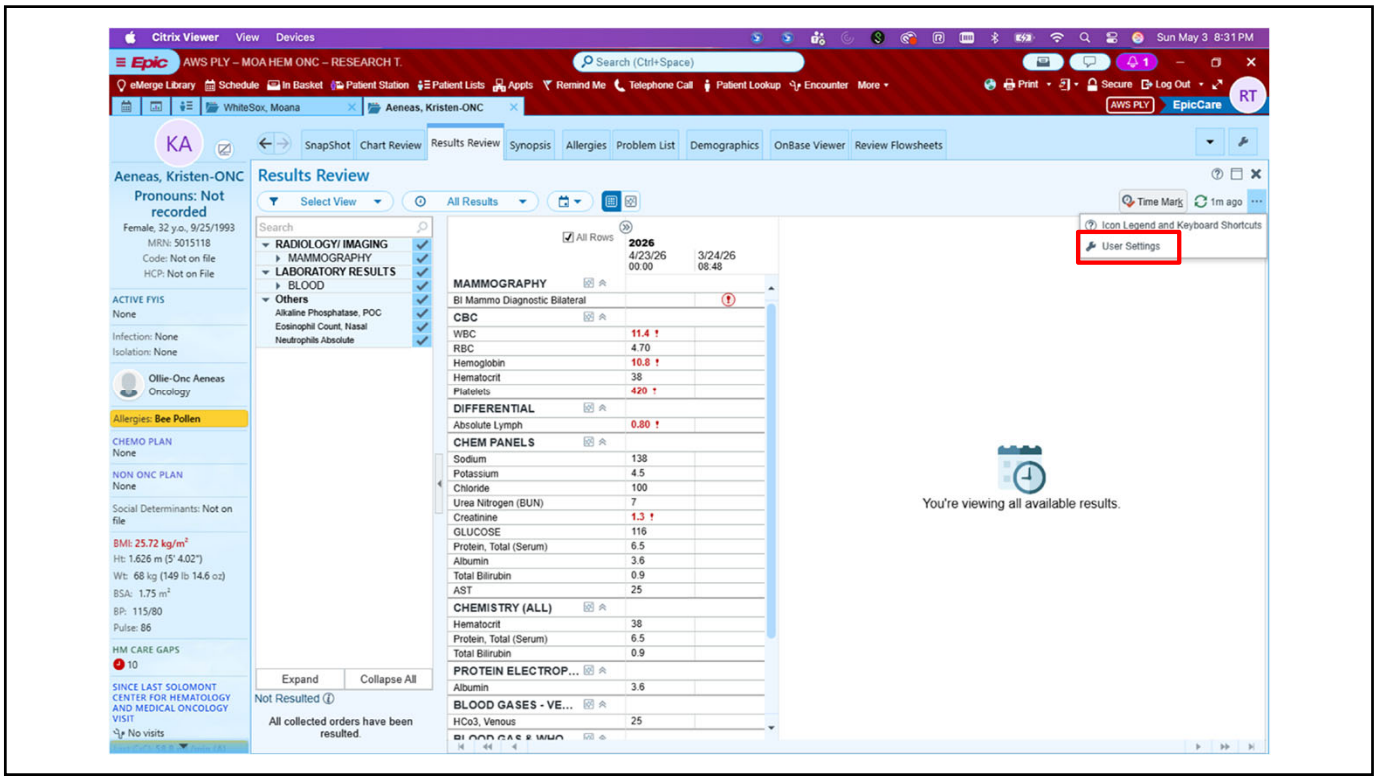
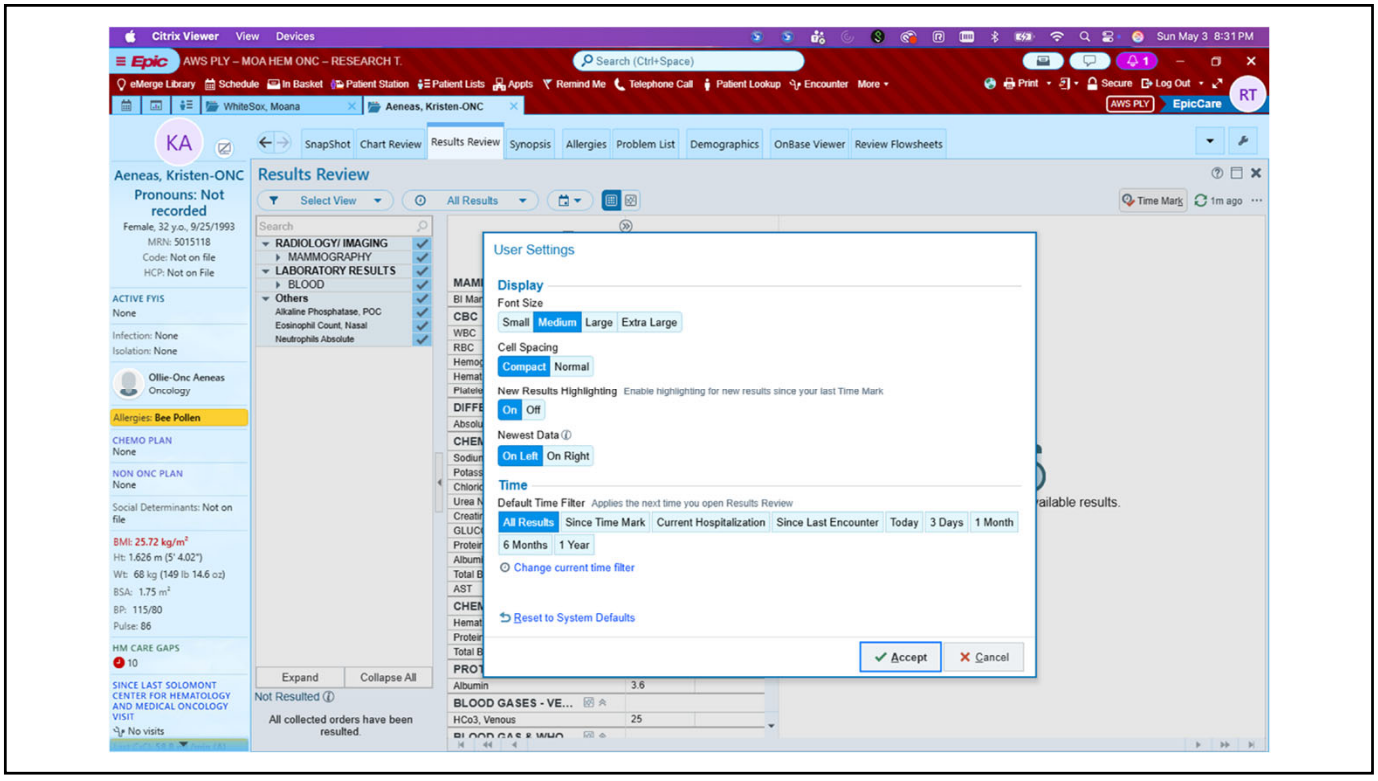
Wt: 68 kg (149 lb 14.6 oz)
BSA: 1.75 m²
BP: 115/80
Pulse: 86
HM CARE GAPS
10
SINCE LAST SOLOMONT CENTER FOR HEMATOLOGY AND MEDICAL ONCOLOGY VISIT
No visits
Results Review
Select View All Results
Time Mark 1m ago
Search
RADIOLOGY/ IMAGING
MAMMOGRAPHY
LABORATORY RESULTS
BLOOD
Others
Alkaline Phosphatase, POC
Eosinophil Count, Nasal
Neutrophils Absolute
Expand Collapse All
Not Resulted
All collected orders have been resulted.
All Rows
2026
4/23/26 00:00
3/24/26 08:48
MAMMOGRAPHY
BI Mammo Diagnostic Bilateral
CBC
WBC 11.4 !
RBC 4.70
Hemoglobin 10.8 !
Hematocrit 38
Platelets 420 !
DIFFERENTIAL
Absolute Lymph 0.80 !
CHEM PANELS
Sodium 138
Potassium 4.5
Chloride 100
Urea Nitrogen (BUN) 7
Creatinine 1.3 !
GLUCOSE 116
Protein, Total (Serum) 6.5
Albumin 3.6
Total Bilirubin 0.9
AST 25
CHEMISTRY (ALL)
Hematocrit 38
Protein, Total (Serum) 6.5
Total Bilirubin 0.9
PROTEIN ELECTROP...
Albumin 3.6
BLOOD GASES - VE...
HCo3, Venous 25
You're viewing all available results.

44


Results Review
Select View
All Results
Time Mark
1m ago
Icon Legend and Keyboard Shortcuts
User Settings
You're viewing all available results.
Expand
Collapse All
Not Resulted
All collected orders have been resulted.

45


Results Review
User Settings
Display
Font Size
Small
Medium
Large
Extra Large
Cell Spacing
Compact
Normal
New Results Highlighting
Enable highlighting for new results since your last Time Mark
On
Off
Newest Data
On Left
On Right
Time
Default Time Filter
Applies the next time you open Results Review
All Results
Since Time Mark
Current Hospitalization
Since Last Encounter
Today
3 Days
1 Month
6 Months
1 Year
Change current time filter
Reset to System Defaults
Accept
Cancel

46

Medications

Supports medication reconciliation and data abstraction

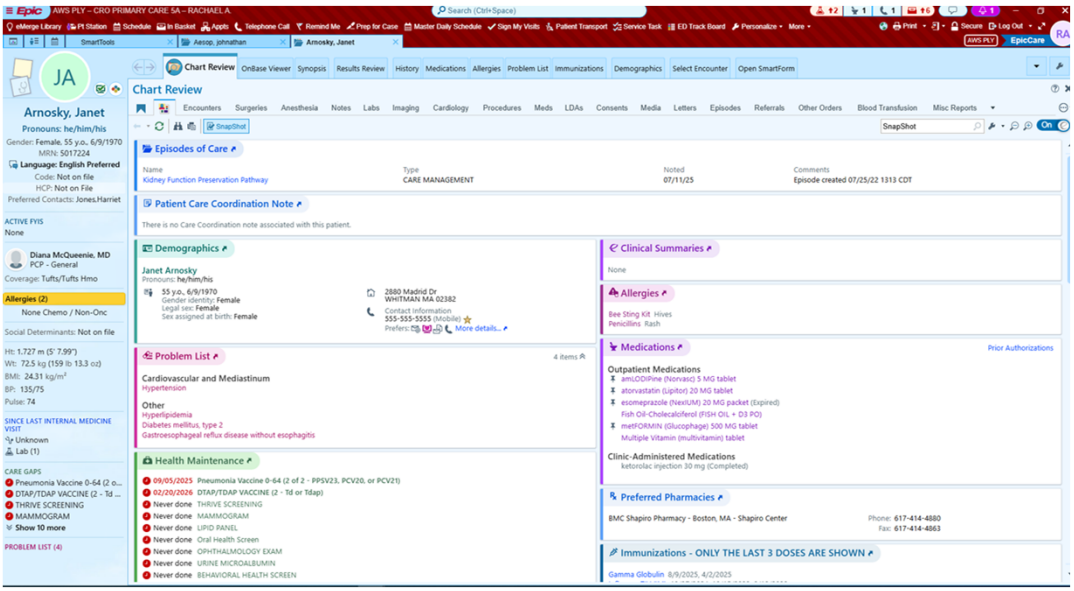
47

Medication Reconciliation

- Familiarizing yourself with participant medications can aid in preparing for possible reactions or understanding participant baseline
  - Example: Participant on beta blocker with baseline low blood pressure
- Best place to be found in chart review/overview
- Helps with big picture of participant status

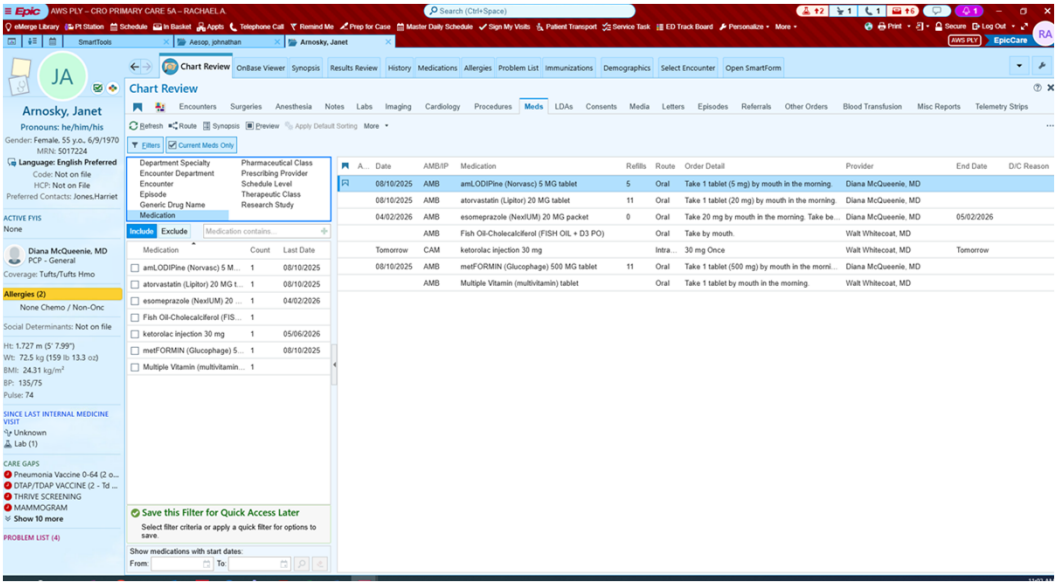
48

Current medications visible on Chart Overview

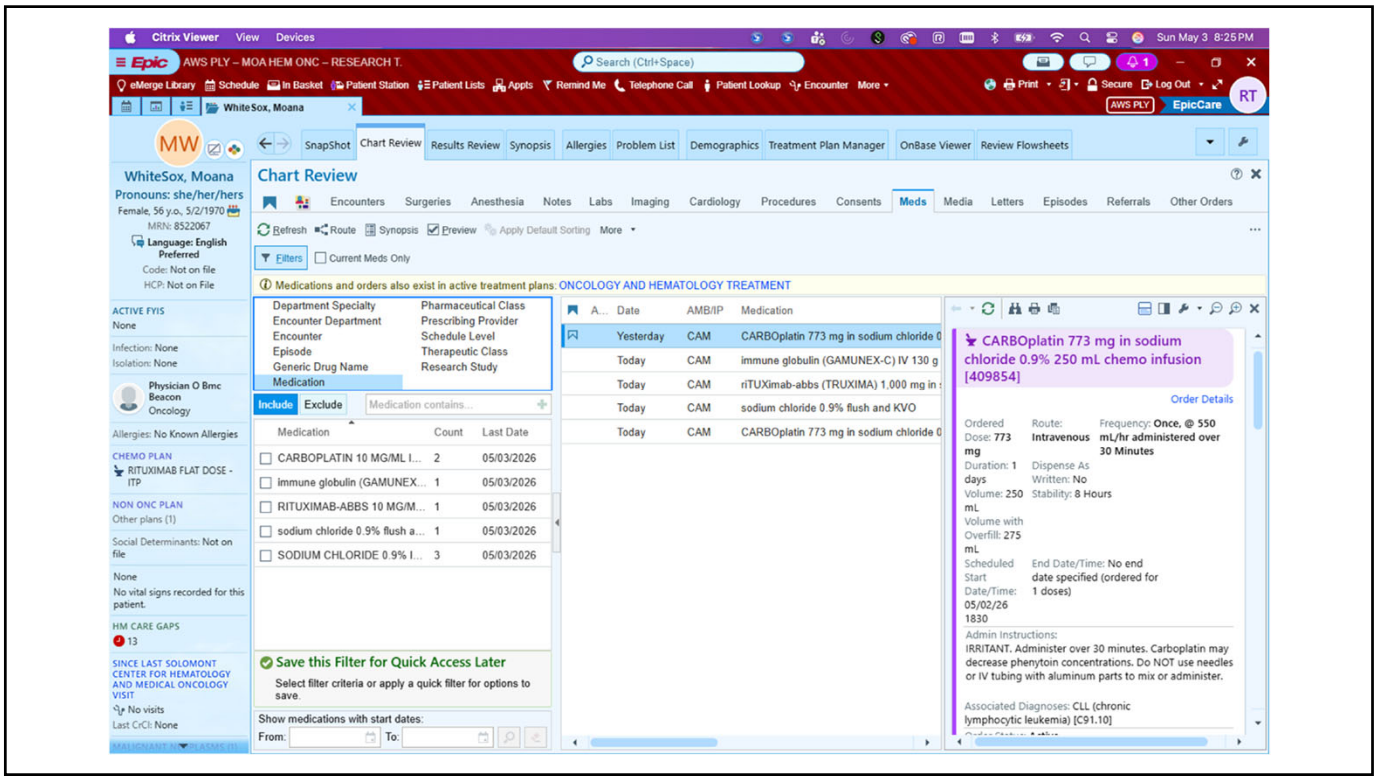


49

Using Medications Tab for Expanded History



50



51

SmartPhrases

Supports efficient and consistent documentation

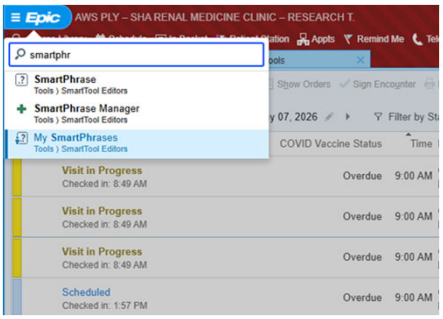
52

What is a SmartPhrase

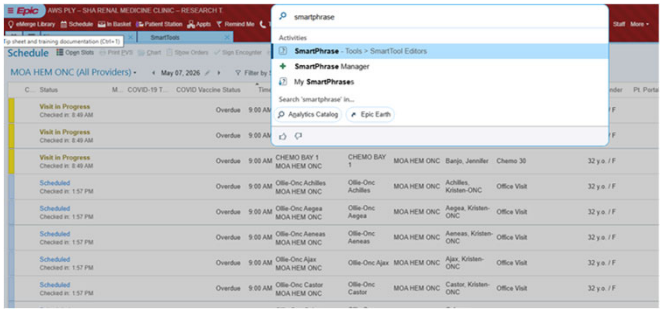
- SmartPhrase = reusable template with autofill
- Helps standardize and streamline documentation
- Useful for research notes, documentation, and repetitive workflows
- Wildcard: “***” Placeholder
  - Use F2 to jump between wildcards

53

Can’t find in toolbar? Search “SmartPhrase”

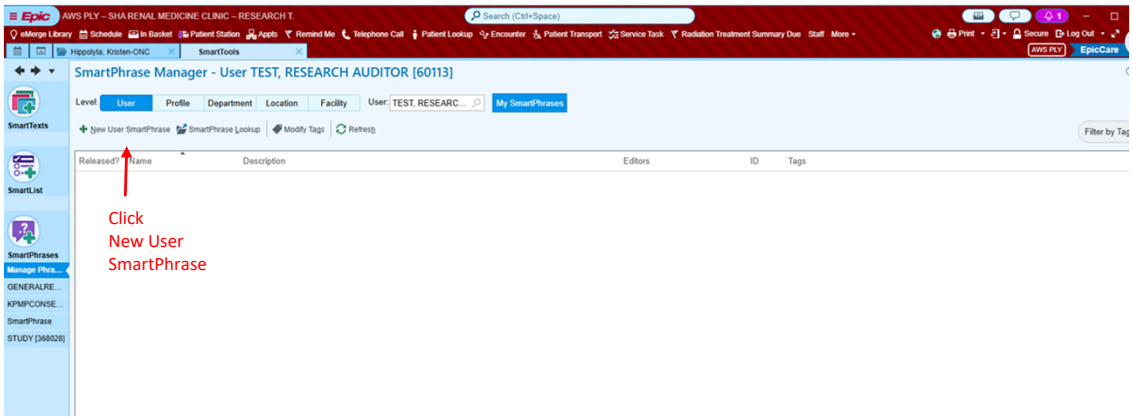


OR



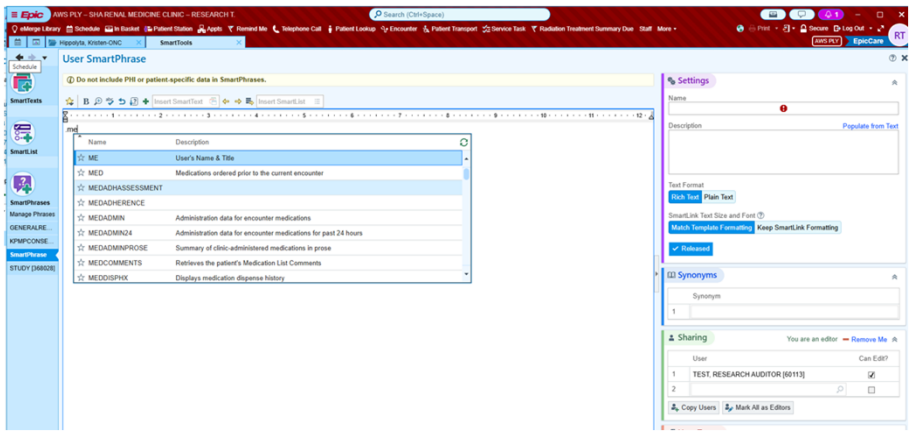
54

Creating SmartPhrases



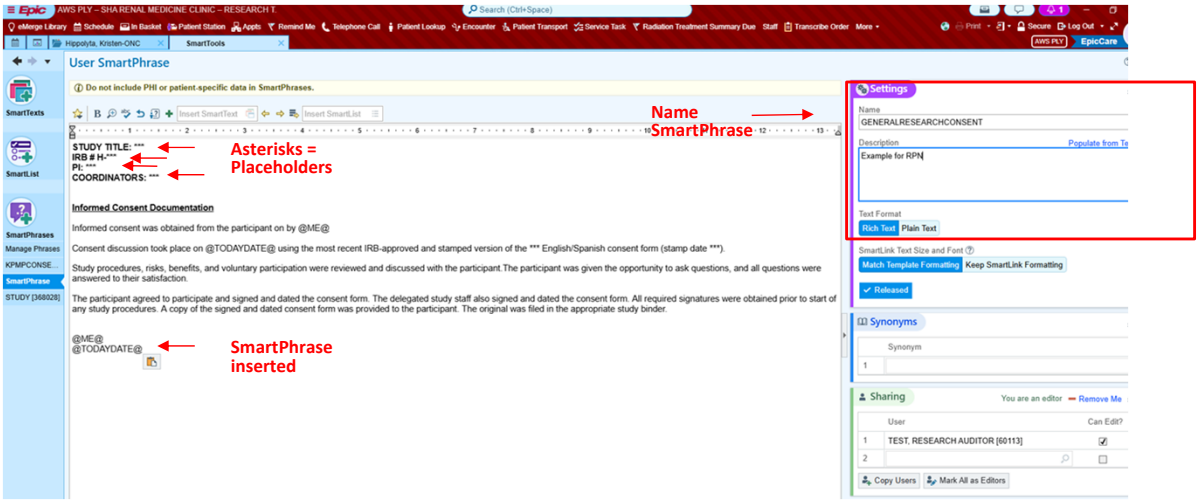
55

Activate: Type "." followed by keyword



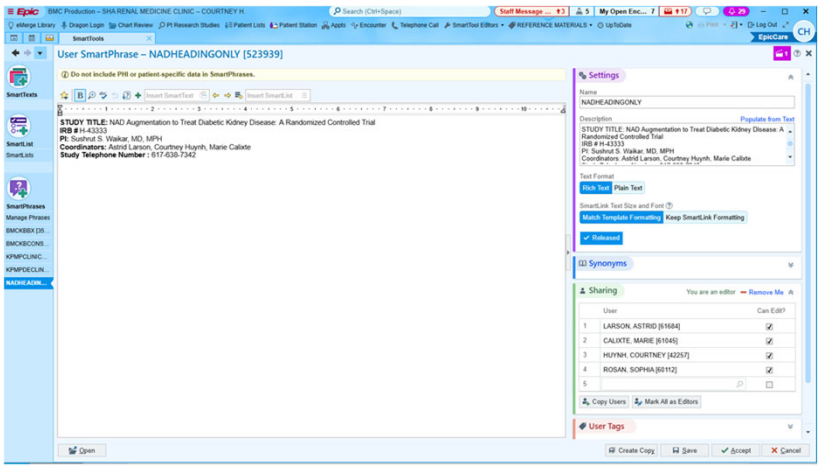
56

Can use for consent documentation



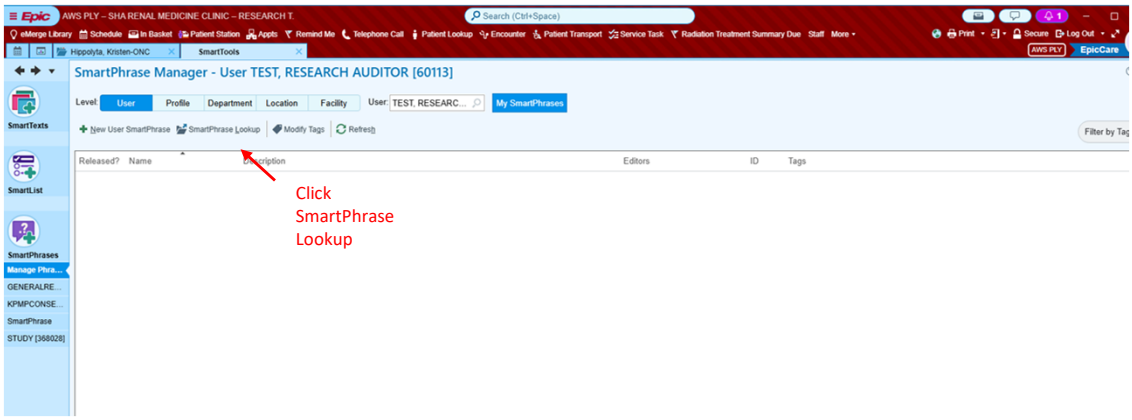
57

Using SmartPhrases for Study Heading



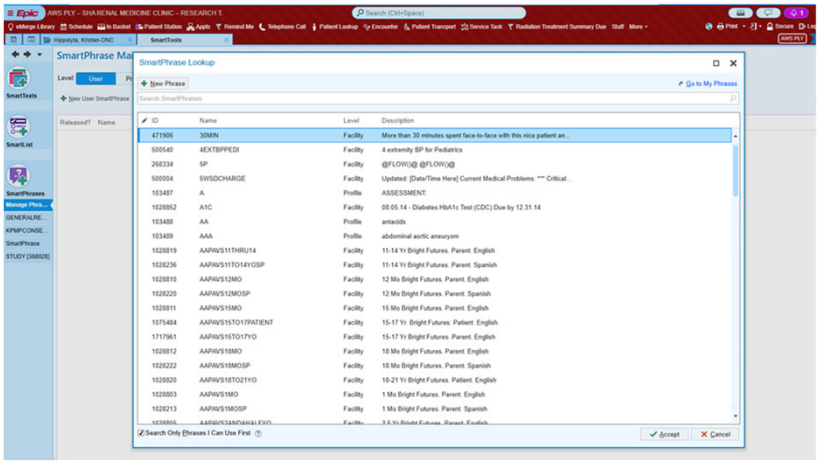
58

Customize Existing Smartphrases



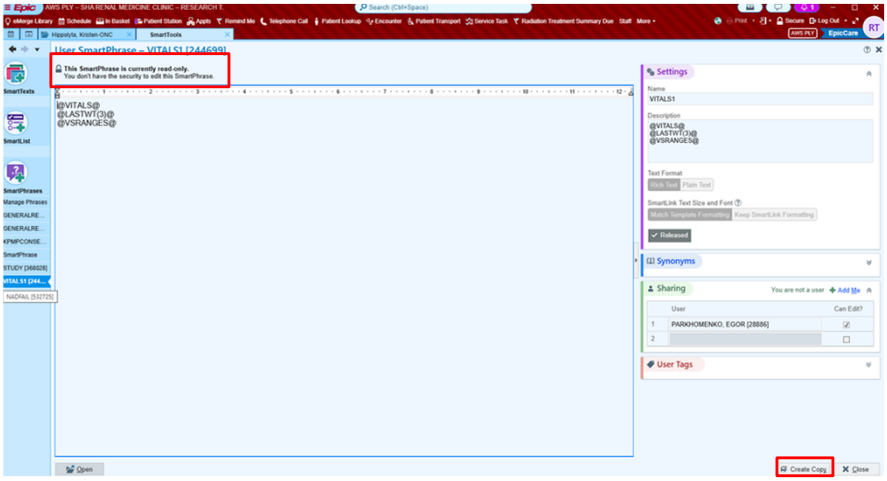
59

Search keywords



60

Create a copy of SmartPhrase to customize



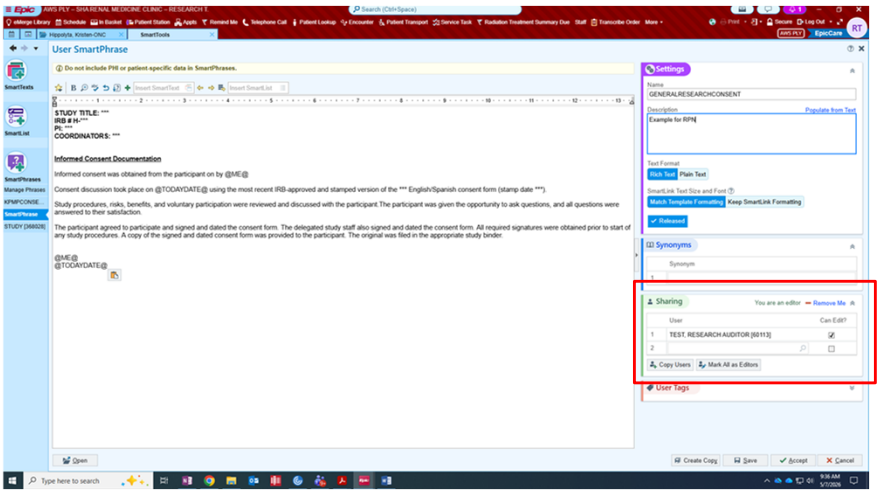
61

Common dot phrases (Examples may vary)

Example	Purpose
.todaysdate	Current date
.me	Name and signature
.now	Current date/time
.mrn	Patient MRN
.vs	Vitals
.name	Patient name

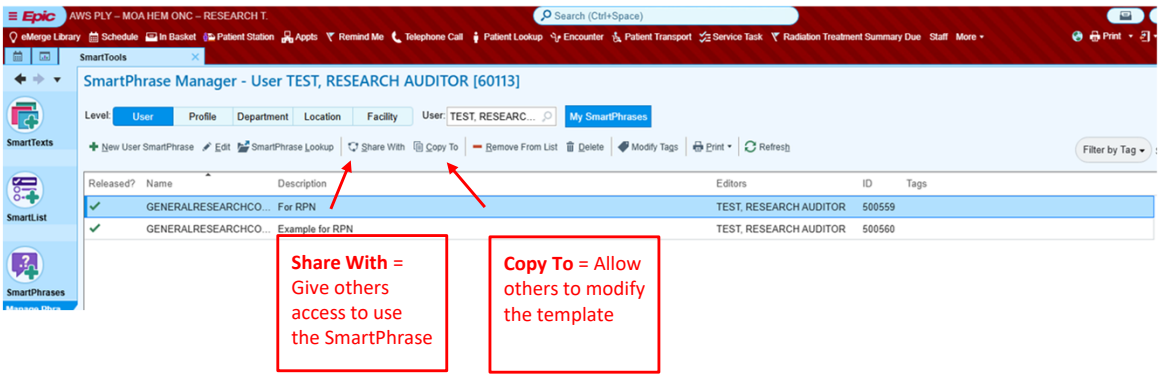
62

Sharing SmartPhrases



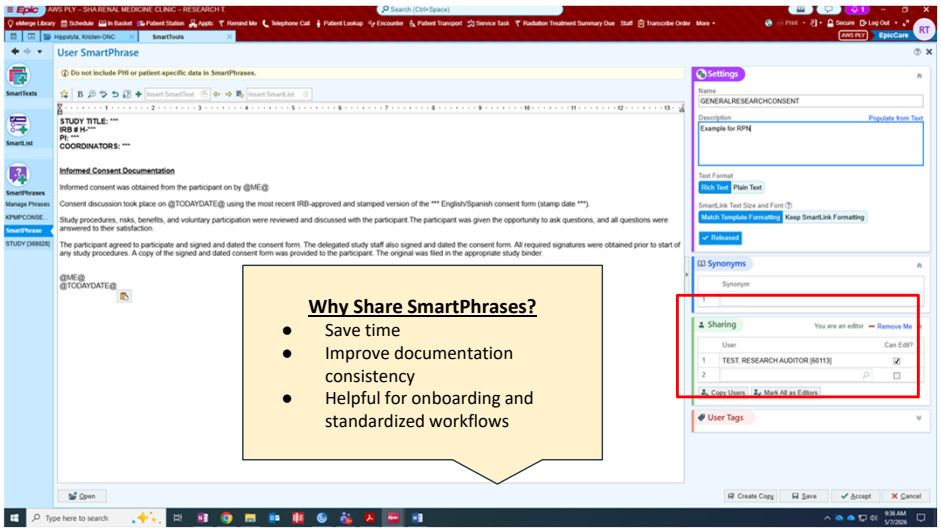
63

Sharing SmartPhrase vs Copying to User



64

Sharing SmartPhrases



65

What's one EPIC feature you'll start using tomorrow?

66