

How to create telemedicine visit on the fly!

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Step 1 use your “encounter” or “patient care” button-

some people will have encounter and others it will be labeled as patient care

The screenshot displays the Epic EMR interface for a user named CRAIG N. The top navigation bar includes various tools like 'Schedule', 'In Basket', 'Pt Station', 'Sign My Visits', 'Patient Care', 'Communications', 'Telephone Call', 'Prep for Case', 'Remind Me', 'Reference Materials', 'Appts', and 'UpToDate'. A red arrow points to the 'Patient Care' button in this bar. Below the navigation bar, the 'In Basket' section is visible, showing a list of messages. The main content area is divided into three panels: a left sidebar with navigation options like 'My Messages', 'Patient Calls', and 'My Open Encounters'; a central panel showing a list of encounters with columns for 'Status', 'Visit', and 'Time'; and a right panel displaying patient information for 'Ambpatient A. Test', including demographics, medical history, and a 'To Close This Visit' section.

Status	Visit	Time
Read	04/10/2020	9:37 AM
Patient: Sanka, Azalech K [3562878] Age: 38 y.o. Type: Telemedicine Last Accessed: NORONHA, CRAIG [6923]		
Read	04/09/2020	7:44 PM
Patient: Test, Ambpatient A [4028366] Age: 52 y.o. Type: Telephone Last Accessed: NORONHA, CRAIG [6923]		

To Close This Visit

Required Items

No additional encounter notes found.

My Open Encounters

Step 2 – go “encounter”

The screenshot displays the Epic EMR interface. At the top, the navigation bar includes 'Epic', 'Schedule', 'In Basket', 'PT Station', 'Sign My Visits', 'Patient Care', 'Communications', 'Telephone Call', 'Prep for Case', 'Remind Me', 'Reference Materials', 'Appts', and 'UpToDate'. The 'Patient Care' dropdown menu is open, showing options: Addendum, Hospital Chart, Enter/Edit Results, Immunizations, Patient Lists, Schedule, Encounter (highlighted with a red arrow), Telephone Call, Communications, Orders Only, Refill Medication, Anticoag, Prep for Case, and Sign My Visits. The 'In Basket' section on the left lists 'My Messages' (Results, Patient Calls, All Reminders, My Open Encounters, Cosign Notes, Staff Message, CC'd Charts, Outside Events, Post Mortem, Tips & Tricks) and 'My Open Encounters'. The main content area shows a list of messages with columns for 'Status', 'Time', and 'From'. The patient profile for 'Ambpatient A. Test' is visible, including details like 'Female, 52 y.o., 3/23/1968', 'MRN: 4028366', and 'Next Appt: None'. A red banner at the top right reads 'To Close This Visit' with a sub-section 'Required Items' stating 'No additional encounter notes found.' and a 'My Open Encounters' button.

Step 3 – Find your patient. Don't forget you can also use "recent patients" as another method to find patients

The screenshot shows a medical software interface with a 'Patient Lookup' dialog box open. The dialog has three tabs: 'Select Patient', 'SDK Account #', and 'Recent Patients'. The 'Select Patient' tab is active, showing fields for Name/MRN, SSN, Birth date, EPI ID, and Sex. Two red arrows point to the Name/MRN and SSN fields. Below the fields are buttons for 'New', 'Find Patient', 'Clear', 'Accept', and 'Cancel'. At the bottom of the dialog is a table of 'Open Patients' with columns for Patient Name, MRN, ID Type, Sex, DOB, Street Address, and SSN. The first row is highlighted in blue.

PATIENT NAME	MRN	ID Type	Sex	DOB	Street Address	SSN
TEST_AMPATIENT A	4028366	BMC...	F	03/23/1968	12 BLOCK ST, BOSTON MA 02118	xxx-xx-2233

Step 4- start a new “encounter” for the patient

Encounter Selection for Test, Ambpatient A

Selected record: Test, Ambpatient A

Contact Date	Contact Type	Provider	Department	Status	CSN	SDK #
04/09/2020	Telephone	NORONHA, CRAIG	SHA PRIMARY CARE 6C		8029143043	
03/19/2020	Telemedicine	TESTA, SILVIA Z	SHA NEUROLOGY		8028908753	
02/03/2020	Appointment	GERIATRICS NURSE	SHA GERIATRIC PRAC...	Canceled	8026325619	
10/21/2019	Orders Only	TDRDOC1, BMC	YAW PEDIATRIC CLINIC		8026727990	
10/07/2019	Orders Only	TDRDOC1, BMC	SHA PEDI NEUROLOGY		8026523162	
10/07/2019	Orders Only	NASS, MELISSA	SHA PEDI NEUROLOGY		8026522636	
08/13/2019	Orders Only	TDRDOC1, BMC	BMC OFFSITE GERIAT...		8025790147	
08/05/2019	Orders Only	TDRDOC1, BMC	SHA CTR DIG DISORD ...		8025671481	

Buttons: New, Search >>, More, Accept, Cancel

Encounter Information: 10 loaded so far, press More to see more.

MRN: 4028366
MyChart: Active
Next Appt: None

Allergies: No Known Allergies

HM Due?: Due

Language: English
Need Interp: No
Primary Ins.: None

Step 5- type “telemedicine” for the type of encounter

The screenshot displays the Epic EMR interface. At the top, there is a navigation bar with various icons and a search bar. Below this is a secondary navigation bar with options like 'Basket', 'New Msg', 'Patient Msg', 'Refresh', 'Edit Pools', 'Manage Pools', 'Personalize', 'Search', and 'Manage QuickActions'. The main content area is divided into several sections:

- My Messages:** A sidebar on the left with options like Results, Patient Calls, All Reminders, My Open Encounters (highlighted), Cosign Notes, Staff Message, CC'd Charts, Outside Events, Post Mortem, and Tips & Tricks.
- My Open Encount...:** A table showing a list of encounters. The first row is highlighted in green and shows a 'Read' status, date '04/10/2020', and time '9:37 AM'. The patient is 'Sanka, Azalech K [3562878]', age 38, type 'Telemedicine', and last accessed by 'NORONHA, CRAIG [6923]'. The second row shows a 'Read' status, date '04/09/2020', and time '7:44 PM' for 'Patient Test, Ambpatient A[4028366]', age 52, type 'Telephone', last accessed by 'NORONHA, CRAIG [6923]'.
- Patient Profile:** A section for 'Ambpatient A. Test', a 52-year-old female, born 3/23/1968. It includes a 'To Close This Visit' warning and a 'Required Items' section stating 'No additional encounter notes found.' Below this is a 'My Open Encounters' button.
- New Encounter Dialog:** A modal window titled 'New Encounter for Test, Ambpatient A'. It contains the following fields:
 - Date: 4/10/2020
 - Type: (Empty field with a red exclamation mark icon)
 - Provider: Craig Noronha, MD
 - Department: SHA PRIMARY CARE 6CButtons for 'Accept' and 'Cancel' are at the bottom. A red arrow points to the 'Type' field.

Step 6= select “accept” to start the telemedicine visit

The screenshot displays the Epic EMR interface for a user named CRAIG N. The main window shows a list of 'My Open Encounters' with two entries:

Status	Visit	Time
Read	04/10/2020 Patient: Sanka, Azalech K [3562878] Age: 38 y.o. Type: Telemedicine Last Accessed: NORONHA, CRAIG [6923]	9:37 AM
Read	04/09/2020 Patient: Test, Ambpatient A [4028366] Age: 52 y.o. Type: Telephone Last Accessed: NORONHA, CRAIG [6923]	7:44 PM

A modal dialog box titled 'New Encounter for Test, Ambpatient A' is open in the foreground. It contains the following fields:

- Date: 4/10/2020
- Type: telemed (dropdown menu)
- Provider: [dropdown menu]
- Department: SHA PRIMARY CARE 6C

At the bottom of the dialog are 'Accept' and 'Cancel' buttons. A red arrow points to the 'Accept' button. In the background, the patient profile for 'Ambpatient A. Test' is visible, showing 'Female, 52 y.o., 3/23/1968'. A red banner on the right side of the screen reads 'To Close This Visit' with a sub-section 'Required Items' stating 'No additional encounter notes found.' Below this is a 'My Open Encounters' button.

Your telemedicine visit will appear after that

The screenshot displays the Epic EMR interface for a patient named "Test, Ambpatient A" (52 y.o., Female, 03/23/1968). The patient's MRN is 4028366 and CSN is 8029147880. The visit is dated 4/10/2020 and is a telemedicine visit with Dr. Craig Noronha, MD. The interface shows various tabs for "Contacts", "Attempts to Contact", "Telephone/Video", "Interpreter Usage", and "Consent and Time". The "Telephone/Video" section indicates that both Telephone and Video methods were used. The "Progress Note" section is active, showing a "Subjective" field with the text: "Patient ID: Ambpatient A Test is a 52 y.o. female." Below this, a paragraph states: "The following portions of the patient's history were reviewed and updated as appropriate: allergies, current medications, past family history, past medical history, past social history, past surgical history, problem list, recent labs and recent radiology." The interface also includes a "Notes" section with a "Create Note" button and a "My Note" section with a "Physical Exam" tab. The bottom of the screen shows a "Sign when Signing Visit" dropdown menu with "Accept" and "Cancel" options.

But I called him yesterday! You can change the date of the visit in the “contacts” area

The screenshot displays the Epic EMR interface for a patient named Test, Ambpatient A. The main window shows a visit on 4/10/2020 with Craig Noronha, MD for Telemedicine. The 'Contacts' section is open, showing a 'Telephone (Outgoing)' contact. A red arrow points to the date field '4/10/2020', which is highlighted in blue, indicating it is the current date of the contact. The contact details include the time '10:47 AM EDT', the relationship 'Self: Test, Ambpatient A', and the contact name 'Pharmacy'. The 'Outcome' field is set to 'No Answer/Busy'. The 'Contact comments' field is empty. The interface also shows a 'Notes' section on the right with a 'My Note' and a 'Progress Note' section containing a 'Subjective' field with the text 'Patient ID: Ambpatient A Test is a 52 y.o. female.' and a paragraph of text: 'The following portions of the patient's history were reviewed and updated as appropriate: allergies, current medications, past family history, past medical history, past social history, past surgical history, problem list, recent labs and recent radioloav.'

I can't find my encounter or patient care button.
Help- I hate my top tool bar and want to change it!
Use the wrench!

The screenshot shows the Epic EMR interface. The top toolbar is green and contains various icons for navigation and actions. A red arrow points to the wrench icon, which is used to customize the toolbar and the Epic menu. Below the toolbar, the interface is divided into several sections: a left sidebar with navigation options, a central area for patient encounters, and a right sidebar with patient information and a 'To Close This Visit' panel.

My Open Encounters

Status	Visit	Time
Read	04/10/2020	9:37 AM
Patient: Sanka, Azalech K [3562878] Age: 38 y.o. Type: Telemedicine LastAccessed: NORONHA, CRAIG [6923]		
Read	04/09/2020	7:44 PM
Patient: Test, AmbpatientA[4028366] Age: 52 y.o. Type: Telephone LastAccessed: NORONHA, CRAIG [6923]		

Ambpatient A. Test
Female, 52 y.o., 3/23/1968
Weight: None
Phone: 617-222-3344 (H)
PCP: Melissa Nass, MD
FYI

To Close This Visit

Required Items
No additional encounter notes found.

My Open Encounters

The wrench opens up a lot of possibilities- I get rid of all of my useless surgical related buttons “prep for case” or things like “patient transport”

The screenshot shows the Epic software interface for customizing the toolbar and menu. At the top, a green navigation bar contains various icons and labels, including 'Prep for Case', which is highlighted by a red arrow. Below this is a grey toolbar with items like 'Schedule', 'In Basket', 'Pt Station', 'Sign My Visits', 'Patient Care', 'Communications', 'Telephone Call', 'Prep for Case', 'Remind Me', 'Reference Materials', 'Appts', 'UpToDate', 'Master Daily Schedule', 'Patient Transport', and 'Service Task'. A dropdown menu is open on the left, listing various options such as 'SmartPhrase Manager', 'Recent', 'Change Context...', 'My Printouts', 'My Reports', 'Preference List Composer', 'Preference List Editor', 'Scheduling', 'HIM', 'Enterprise Billing', 'Referrals', 'Reports', 'Tools', 'Mark Patients For Merge', 'BMC Chart Correction Guide', 'Help', 'My Settings', 'Change Context...', 'Secure', 'Log Out', 'Exit', and 'Rarely Used'. Handwritten annotations include: 'Drag and drop between menus' with a curved arrow between 'My Reports' and 'Preference List Editor'; 'Rearrange the toolbar' with a curved arrow between 'Telephone Call' and 'Prep for Case'; and 'Drop things here to get them out of the way' with an arrow pointing to the 'Rarely Used' option. At the bottom right, there are 'Accept' and 'Cancel' buttons.

Just use drag and drop to remove or rearrange things

The screenshot shows the 'Customize Your Epic Menu and Toolbar' dialog box. The toolbar at the top contains items like 'Epic', 'Schedule', 'In Basket', 'Pt Station', 'Patient Care', 'Communications', 'Telephone Call', 'Remind Me', 'Reference Materials', 'UpToDate', 'BMC Directory', 'SmartPhrase Manager', 'Sign My Visits', 'Service Task', and 'Appts'. The menu on the left lists various options, with 'ED Track Board', 'Patient Transport', and 'Prep for Case' highlighted in green. A blue bar at the bottom of the menu is labeled 'Rarely Used'. Handwritten annotations include: 'Drop here to pin to the top' at the top of the menu; 'Drag and drop between menus' with an arrow pointing to the menu list; 'Rearrange the toolbar' with an arrow pointing to the toolbar; and 'Drop things here to get them out of the way' with an arrow pointing to the 'Rarely Used' bar. A 'Reset to Default Menus' button is at the bottom left, and 'Accept' and 'Cancel' buttons are at the bottom right.

Customize Your Epic Menu and Toolbar

Customize Your Epic Menu and Toolbar

Epic Schedule In Basket Pt Station Patient Care Communications Telephone Call Remind Me Reference Materials UpToDate BMC Directory SmartPhrase Manager Sign My Visits Service Task Appts

Drop here to pin to the top

Change Context...
My Printouts
My Reports
Preference List Composer
Preference List Editor

ED Track Board
Patient Transport
Prep for Case

Scheduling
HIM
Enterprise Billing
Referrals
Reports
Tools
Mark Patients For Merge
BMC Chart Correction Guide
Help
My Settings
Change Context...
Secure
Log Out

Rarely Used

Reset to Default Menus

Accept Cancel

Drag and drop between menus

Rearrange the toolbar

Drop things here to get them out of the way

Good spot for things you don't use

Now my top bar is more user friendly to me

The screenshot displays the Epic EHR interface with a user-friendly top bar. The bar is green and contains various navigation and utility icons. On the left, there is an 'Epic' logo and a search bar. The main navigation area includes icons for Schedule, In Basket, Pt Station, Patient Care, Communications, Telephone Call, Remind Me, Reference Materials, UpToDate, BMC Directory, and SmartPhrase Manager. On the right, there are icons for Print, Secure, and Log Out. Below the top bar, the 'In Basket' section is visible, showing a list of messages and a table of open encounters. The 'My Open Encounters' section is highlighted, showing a table with columns for Status, Visit, and Time. The table contains two rows of data. The first row shows a 'Read' status for a visit on 04/10/2020 at 9:37 AM, with patient information: Sanka, Azalech K [3562878], Age: 38 y.o., Type: Telemedicine, and Last Accessed: NORONHA, CRAIG [6923]. The second row shows a 'Read' status for a visit on 04/09/2020 at 7:44 PM, with patient information: Test Ambpatient A [14028366].

Top Bar Navigation: Epic, Schedule, In Basket, Pt Station, Patient Care, Communications, Telephone Call, Remind Me, Reference Materials, UpToDate, BMC Directory, SmartPhrase Manager, Print, Secure, Log Out.

In Basket Section: New Msg, Patient Msg, Refresh, Edit Pools, Manage Pools, Personalize, Search, Manage QuickActions, Attach, Out, Properties.

My Open Encounters Table:

Status	Visit	Time
Read	04/10/2020	9:37 AM
Patient: Sanka, Azalech K [3562878] Age: 38 y.o. Type: Telemedicine Last Accessed: NORONHA, CRAIG [6923]		
Read	04/09/2020	7:44 PM
Patient: Test Ambpatient A [14028366]		

Right Panel: QuickActions, Encounter, Sign Encounter, QuickNote, Chart, Telephone Call, Message, Message, Visits/Patient Info, Meds/Problems, Vitals/Labs, My Last Note, More.

To Close This Visit: Required Items, No additional encounter notes found.

