

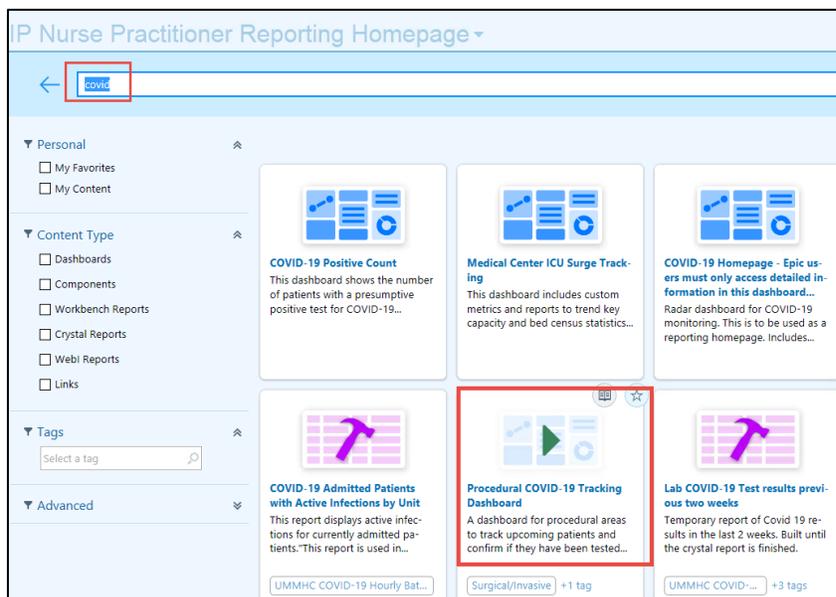
Quick Start Guide

Pre-Procedure Evaluation Phone Call Workflows with Covid-19 Testing Steps

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Dashboard: Procedural Covid-19 Tracking

1. Log into Epic
2. Click the Dashboard Workspace Tab
3. Using the dropdown, select the Procedural 'COVID-19 Tracking Dashboard'



4. Find specific patients scheduled for procedures within the next 7 days using filters for:
 - a. Surgeon
 - b. Location
 - c. Service
5. Click the date hyperlink to open the report of patients scheduled on that specific date.

Procedural COVID-19 Tracking Dashboard

Surgeon: Not set | Location: Not set | Service: Not set

Patients Next 7 Days

OR COVID-19 PxP Pre- Procedure Patients Next 7 Days

Date	Total count of Patient	% Not Started	% Started	% Completed
05/13/2020	2	0.00 %	0.00 %	100.00 %
05/14/2020	1	100.00 %	0.00 %	0.00 %
05/15/2020	1	0.00 %	100.00 %	0.00 %
Ratio	-	25.00 %	25.00 %	50.00 %
Total count	4	-	-	-

Action Required within the Next 7 Days

COVID-19 Order Not Placed

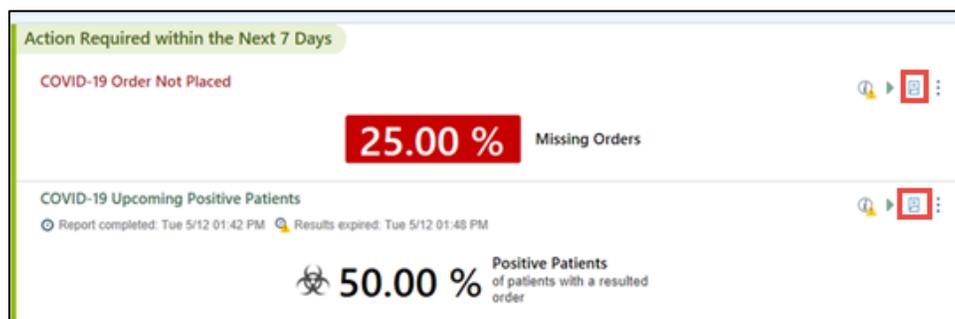
25.00 % Missing Orders

COVID-19 Upcoming Positive Patients

Report completed: Tue 5/12 01:42 PM | Results expired: Tue 5/12 01:48 PM

50.00 % Positive Patients of patients with a resulted order

- For the **Covid-19 Order Not Placed** and **Covid-19 Upcoming Positive Patients** reports, click on the paper icon on the right to access the drill down reports.



- Click the Star Icon dropdown to change views once in the report. Select **Covid-19 Test Not Ordered** or **Covid-19 Testing Positive Patients** to toggle between reports.

OR COVID-19 PxP Pre- Procedure Patients Next 7 Days [151676] as of Tue 5/12/2020 3:32 PM

Filters Options Re-run Report Telephone Call

Detail	COVID-19 Task Status	COVID-19 Resulted Order Ratio						
Date	Patient	Sched Start	Procedure	Physician	Location/Department	COVID Testing 2 Days	COVID	
05/14/2020	Lane, Summer	0935	Removal Of Hardware Deep - Back [99]	Robert C. Steppacher Jr., Md	MEM OR	☐	☐	
05/15/2020	Covid, Test	0940	Appendectomy [1074495000]	Robert C. Steppacher Jr., Md	UNV OR	☐	☐	

Star Icon dropdown menu:

- Covid-19 Test Not Ordered
- Covid-19 Testing Positive Patients
- Save View
- Display tab from Report Settings
- Manage Report Views

- In order to get back to the default view, select **Display tab from Report Settings** button under the Star Icon dropdown.

Reports

From this screen, you can see columns for COVID-19 Task Status for 2 Days prior to surgery, as well as 7 days prior to surgery.

- A white square icon represents a test has not been ordered.
- A half-filled circle icon represents the test has been started

The user can also see a column for the COVID-19 Test Status within 7 days. This column will display a positive, negative, collected, or not collected status for the COVID-19 test within the last 7 days. Hover over the column heading to display more information.

- A red icon represents a positive result.
- A green icon represents a negative result.
- A yellow triangle icon represents a result that has not been collected.

Preprocedure Covid-19 Testing [151516] as of Tue 5/12/2020 12:58 PM

Filters Options Re-run Report Telephone Call

Detail	COVID-19 Task Status	COVID-19 Resulted Order Ratio				COVID-19 Task Status 2 Days	COVID-19 Task Status 7 Days	COVID-19 Test
Date	Patient	Sched Start	Procedure	Physician	Location/Department			
05/13/2020	Query, Him	0910	Vitrectomy, Pars Plana Approach With Endolaser Photocoagulation [1076704000]	Shlomit Schaal, Md Phd	HAHN OR 2 Floor	✓	✓	◆
05/13/2020	Beaupre, Amber	1055	Biopsy, Fine Needle Aspiration, Without Imaging Guidance, Each Additional Lesion [1071000400]	Francesco A. Aiello, Md	HAHN OR 2 Floor	✓	✓	●
05/14/2020	Lane, Summer	0935	Removal Of Hardware Deep - Back [99]	Robert C. Steppacher Jr., Md	MEM OR	□	□	
05/15/2020	Covid, Test	0940	Appendectomy [1074495000]	Robert C. Steppacher Jr., Md	UNV OR	◐	◐	⚠

If the COVID-19 Test has not been ordered for the patient:

From this report, the user can see whether or not the test has been ordered for the patient. If the test has not been ordered for the patient, a **telephone call** to the patient must be initiated.

Telephone Encounter

- To begin the Telephone Encounter, click the **Telephone Call** button.
- If prompted, enter in the **Provider** you are documenting the call for. If not, skip to **step 3**.

- Call Intake** activity will appear.

Contacts

- Select **Outgoing Call**. Complete the required sections

NOTE: You do not need to select an **OUTCOME** if you speak to the patient. Also, the contact comments should only be used for “left message with spouse”, etc.

Travel Screening

Travel and Exposure Screening
↑ ↓

Time taken: 5/12/2020 0950 Responsible Create Note Show Last Filed Value Show Details Show All Choices

Symptoms

Symptoms in the Last Week

Abdominal pain
 Bruising or bleeding
 Chills/Shaking chills
 NEW Cough
 Diarrhea
 Fever
 NEW Loss of taste or smell
 NEW Muscle pain
 NEW Headache
 NEW Shortness of breath
 Sore throat
 Vomiting
 Weakness
 None of these symptoms
 Patient unable to respond
 Unable to reach patient

Travel Screening

● Traveled outside the U.S. in the last 14 days?

See the CDC website for known countries of outbreak: [CDC Travel notices](#). Contact provider if the patient visited any of the known countries of outbreak.

Traveled on a cruise in the last 14 days?

Exposure Screening

● Contact with someone with a communicable disease in the last month?

See the CDC website for known countries of outbreak: [CDC Travel notices](#). Contact provider if patient came into contact with any high risk communicable disease.

Create Note

NOTE: If the patient has **NOT** had any symptoms within the last week, you **MUST** check of “None of these symptoms” for the screening to save correctly.

SmartSets

- I. Search for Smartset (I I53) COVID Pre-Procedural Testing .
 - a. Click **Add**.
 - b. Click **Open SmartSets**

SmartSets
+ Add

Search Results

COVID Pre-Procedureal Testing

Suggestions

Welcome to Medicare Visit

- c. Choose the appropriate test, **asymptomatic** or **symptomatic** AND the **Patient Instructions**. Complete the required field of **location**.

COVID Pre-Procedural Testing Personalize

▼ Labs

▼ COVID Pre-Procedural Testing

Ask the patient if at the present time, they are experiencing fever, cough or shortness of breath. **If the patient has any of these symptoms, place the "symptomatic" order.**

COVID-19 PCR, Pre-Surgical (Asymptomatic)

COVID-19 PCR, Pre-Surgical (Symptomatic)

▼ Patient Instructions

▼ COVID Testing Patient Instructions

COVID Testing (English)

COVID-19 PCR, Pre-Surgical (Asymptomatic)

Expected: 5/11/2020, Expires: 5/11/2021, Lab Collect, Nasopharyngeal, Swab, Resulting Agency - UMMHC LAB

Accept Cancel

Status: Normal Standing Future

Expected Date:

Today Tomorrow 1 Week 2 Weeks

1 Month 3 Months 6 Months (Lab)

Approx.

Comment:

After Consult Before Next Appt

Expires:

1 Month 2 Months 3 Months 4 Months

6 Months (Lab) 1 Year

Priority: Routine STAT

Class: Lab Collect Clinic Collect External

Specimen Type:

Specimen Src:

Site test being performed at:

University Campus Marlborough Campus

HealthAlliance Leominster Campus Barre Campus

Comments: Add Comments (F6)

Resulting Agency:

Add-on: No add-on specimen found

Notes

4. Document the rest of your call in the **Notes** section
5. You can utilize the following SmartPhrases
 - a. **“.COVIDPrePro72hrs” (72 Hour Preprocedural COVID Screening Call)**
 - b. **“.COVIDPrePro24hrsNEGRESULT” (24 Hour Preprocedural COVID Screening Call – Negative result)**
 - c. **“.COVIDPreProPOSRESULT” (Preprocedural COVID Screening – Positive result)**

Documentation ▾ This Call

+ Create Note

My Note Tag

★ | B | I | 🔗 | 🔗 | ↶ | ↷ | + Insert SmartText

↶ | ↷ | 🔄 | 🔄 | 📎

Sign at exit WS ▾ Accept Cancel

Task Section

6. Review COVID-19 testing task status during the call.

The screenshot shows the 'Call Intake' interface for a patient named 'Him Query'. The interface includes a navigation bar with tabs like 'PAC', 'Flowsheets', 'Order Inquiry', 'Results Review', 'Chart Review', 'Call Intake', and 'Take Action'. The main content area displays a list of tasks with their status and completion options. The tasks listed are:

- H&P: Complete (checked), Not Needed (unchecked), Open Notes (link), Add Comments (button)
- PAC Screening Call: Started (unchecked), Complete (checked), Not Needed (unchecked), Add Comments (button)
- Procedure and Treatment Consent Panel 1: Complete (checked), Not Needed (unchecked), Open Media Manager (link), Add Comments (button)
- Procedure and Treatment Fill In Consent: Complete (checked), Not Needed (unchecked), Open Media Manager (link), Add Comments (button)
- Verification Pre-op Call - Confirm NPO: Started (unchecked), Complete (checked), Not Needed (unchecked), Add Comments (button)

At the bottom of the task list, there are two entries for 'COVID-19 PCR' tests, both marked as 'Complete' with a 'Final result - Abnormal' status highlighted in yellow.

Sign Encounter

7. Click the **Sign Encounter** button on the bottom right of the screen.

The screenshot shows a 'Sign Encounter' dialog box overlaid on the main interface. The dialog box has a title bar with 'Associate Signed Orders' and 'Reprint Procs' buttons. The main content area displays the following information:

- Orders Signed This Visit (1)**
- COVID-19 PCR, Pre-Surgical (Asymptomatic)**
- Future, Expected: 5/11/2020, Expires: 5/11/2021, Lab Collect, Specimen Sources - Nasopharyngeal, Specimen Types - Swab, Resulting Agency - UMMHC LAB, New collection

At the bottom right of the dialog box, there are 'Accept' and 'Cancel' buttons. Below the dialog box, in the main interface, there is a blue button with a clipboard icon and the number '1', and a red-bordered button with a green checkmark and the text 'SIGN ENCOUNTER'.

Where to Find Encounter Information

The information documented in this Telephone Encounter can be found in Chart Review on the Encounters Tab and the Notes Tab.

Encounters Tab:

Chart Review

Encounters | Episodes | Notes | Letters | Meds | Labs | Micro | Imaging | Procedures | Heart Vascular | Other Orders | LDAs | Surgeries | Consents | Administrative | Media | Referrals | Misc Reports

Refresh (7:00 AM) | Route | Review Selected | Preview | Encounter | More | Select All | Deselect All | Add to Bookmarks | Lifetime | PowerShare | OnBase

Filters: Hide Add'l Visits | Me | Cardiology | UMass Memorial Medic... | Admissions | Anticoagulation | Colorectal Surg

When	Discharge	Type	Visit Type	Diagnosis	With	Dept
Today		Telephone		Chronic systolic (conge...	Cupid, Cardiologist, MD	ACC CARDIOLC
01/17/2020		Procedure			Rade, Jeffrey J., MD	
01/14/2020		Orders Only			Cupid, Invasive Nurse, RN	UNV HEART VA
01/06/2020		Transthoracic Echocard...	TRANSTHORACIC EC...	Bacteremia	Aaron, Daniel L., MD	ACC CARDIAC I

Telephone

UMass Memorial Medical Center- University Campus ACC Building Cardiology Medicine

5/11/2020

Cardiologist Cupid, MD | **Chronic systolic congestive heart failure (CMS/HCC)**
Cardiology | Dx

Conversation (Oldest Message First)

You contacted Cupid, Jane | 5/11/20 6:55 AM

Me

Note | 5/11/20 6:58 AM

SARS-CoV2 (COVID-19) Preoperative and Preprocedural Testing Instructions

I. Instructions Regarding Testing

You are required to undergo testing for COVID-19 prior to your scheduled surgery or procedure. This test will take approximately 24 hours to process, and you will be called with the results.

You must report to one of our ambulatory testing locations to have this test performed. Your preference in location (University Campus or Marlborough Hospital) will be included in the lab order today, and you must report to the designated center. We will be unable to accommodate you at an alternative location.

Testing must be performed 2 days prior to your scheduled surgical

Notes Tab:

Chart Review

Encounters | Episodes | **Notes** | Letters | Meds | Labs | Micro | Imaging | Procedures | Heart Vascular | Other Orders | LDAs | Surgeries | Consents | Administrative | Media | Referrals | Misc Reports

Refresh (7:00 AM) | Route | Review Selected | Pt Msg Review | Preview | Tag | More | Select All | Deselect All | Add to Bookmarks | OnBase

Filters: Hide Add'l Notes | Me | Cardiology | UMass Memorial Medic... | H/P | DC Sum | Consults | Hide Deleted | Ancillary | Nursing | Periop

Encounter Date	Note DOS	Type	Author	Author Specialty	IP Note Service
Today	Today at 0...	Telephone Encounter	Me	Cardiology	

Cardiologist Cupid, MD | Telephone Encounter | Encounter Date: 5/11/2020
Physician | Signed
Specialty: Cardiology

Signed

Enter additional documentation about the phone call here

Show: Manual Template Copied | Clear all

Added by: Cardiologist Cupid, MD

Hover for details

Electronically signed by Cardiologist Cupid, MD

[Telephone on 5/11/2020](#) | Click this hyperlink to view full encounter information

Consult Notes

No notes of this type exist for this encounter.

