Epic : Reference Guides

My Chart Reference Guide

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Generate Directions Using Patient Instructions During the Visit

You can add instructions to the After Visit Summary for the patient to sign-up for a MyChart account:

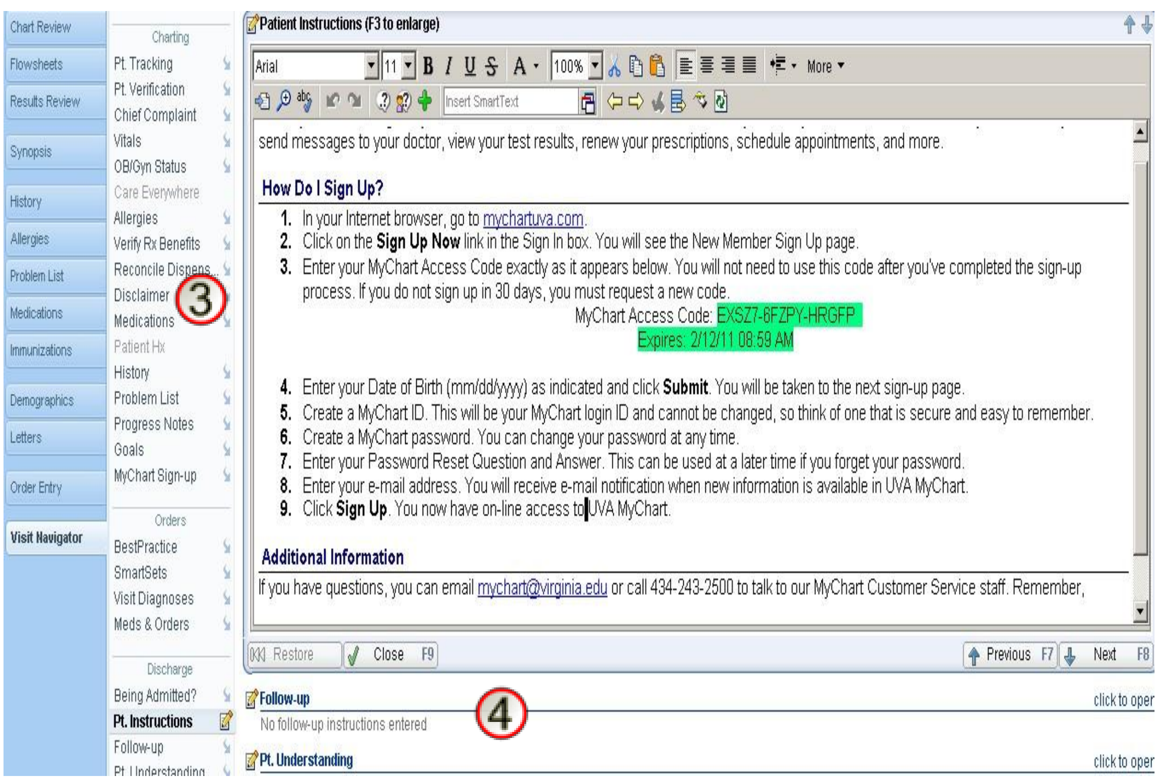
1. In a patient encounter, open the **Patient Instructions** section of the Visit Navigator.
2. Enter "MYCACT" to pull in the MyChart Activation Information SmartLink.
   - The SmartLink text includes directions the patient needs to sign up for MyChart, and a unique activation code.
3. If you want to add a personal note to the patient, add it to the patient instructions.
4. Click **Close**.
5. After you complete the encounter, make sure the patient receives his/her **After Visit Summary** and document that the patient understands the information in the "Patient Response to Instructions" section.

To find the PREFERRED instructions for the patient go to www.mychartuva.com

Click "SIGN UP FOR MYCHART"

Complete the form

Activation information will be emailed to the patient within one business day.



Sign Up Patients to Use MyChart

Clinical and Clerical Support

Send the Patient an Activation Letter after a Visit

You can create a letter for the patient to sign-up for a MyChart account.

1. Open the patient's chart and open the **Letters** activity.
2. In the Letter Templates section, enter "MYCHART" in the **Match** field and press **ENTER**.
   - The letter that comes up is "mychart to patient activation"
3. Double-click **MyChart to Patient, Activation** to create a new letter based on that template.
   - The letter template includes directions the patient needs to sign up for MyChart, including a unique access code, and automatically pulls in information specific to the patient.
4. If you want to add a personal note to the patient, add it to the message text.
5. Click **Print, Mark as Sent and Accept**.
6. Send the letter.

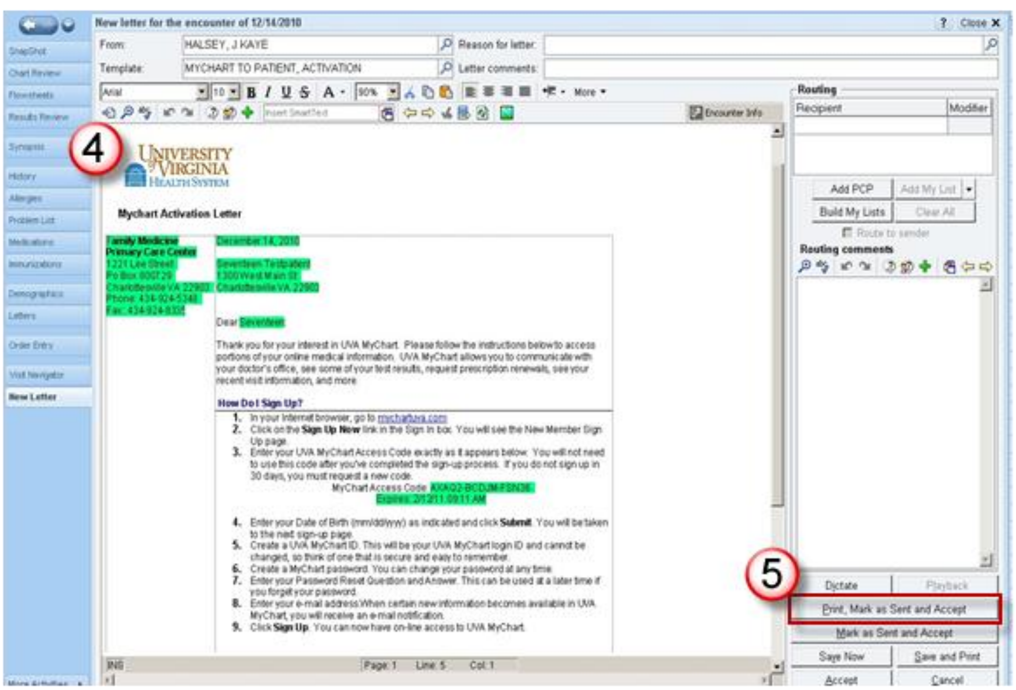
Note: If a patient requests that their MyChart account be deactivated, the instructions are issued through the Letter Template "mychart to patient deactivation".

To find the PREFERRED instructions for the patient go to www.mychartuva.com

Click "SIGN UP FOR MYCHART"

Complete the form

Activation information will be emailed to the patient within one business day.



Quickly Add MyChart Instructions as your Favorite Letter Template

Add a letter template to your list of favorites for quick access in the future. Repeat step 2 above, select the MyChart to Patient, Activation template, and click **Add to Favorites**.

Use MyChart to Manage Results

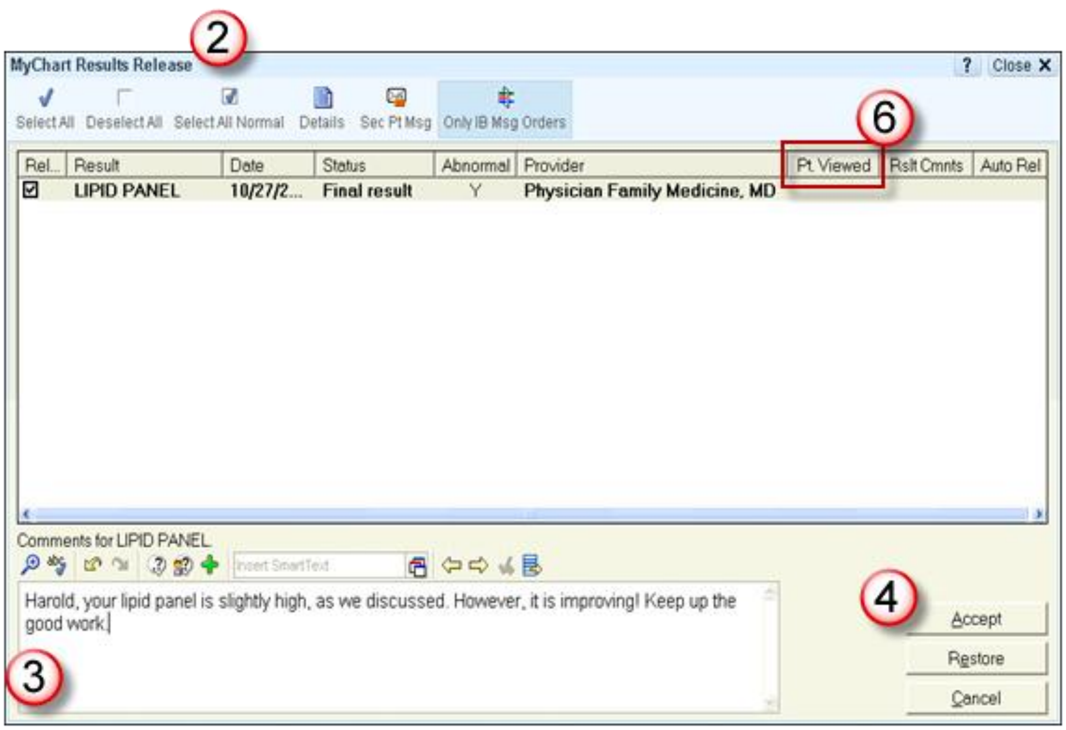
LIPs, Physicians, Nurse Practitioners, Physician Assistants

Use MyChart Results Release to Manually Release RECENT Results from your In Basket

You can manually release test results to a patient's MyChart account. Use the MyChart Results Release activity to include comments about the result to help the patient understand what it means or provide encouragement for a job well done (lower cholesterol levels, for example).

1. Open your In Basket. In the Results folder, select a Results message.
2. Click **Result Rel**. The MyChart Results Release activity opens. The result associated with the message is automatically selected.
3. Enter comments about the result in the **Comments** field.
4. Click **Accept** to release the result.
   - *Please note, when you review the results of normal labs they are automatically released to the pt.*

6. After the result is released you will be able to see that the patient viewed the labs under "Pt Viewed".



View All Results for the Patient

Click **Only IB Msg Orders** to clears the filter that shows only results associated with messages in your In Basket. Select the check boxes for several results and click **Accept** to release all the selected results at the same time.

Remove Results From a Patients MyChart

Click the **Pt. Viewed** column header to sort on that column. The letter Y appears in the column if the patient has viewed the result. Clear the check boxes for unviewed results (results without a Y in that column) that shouldn't be viewed in MyChart.

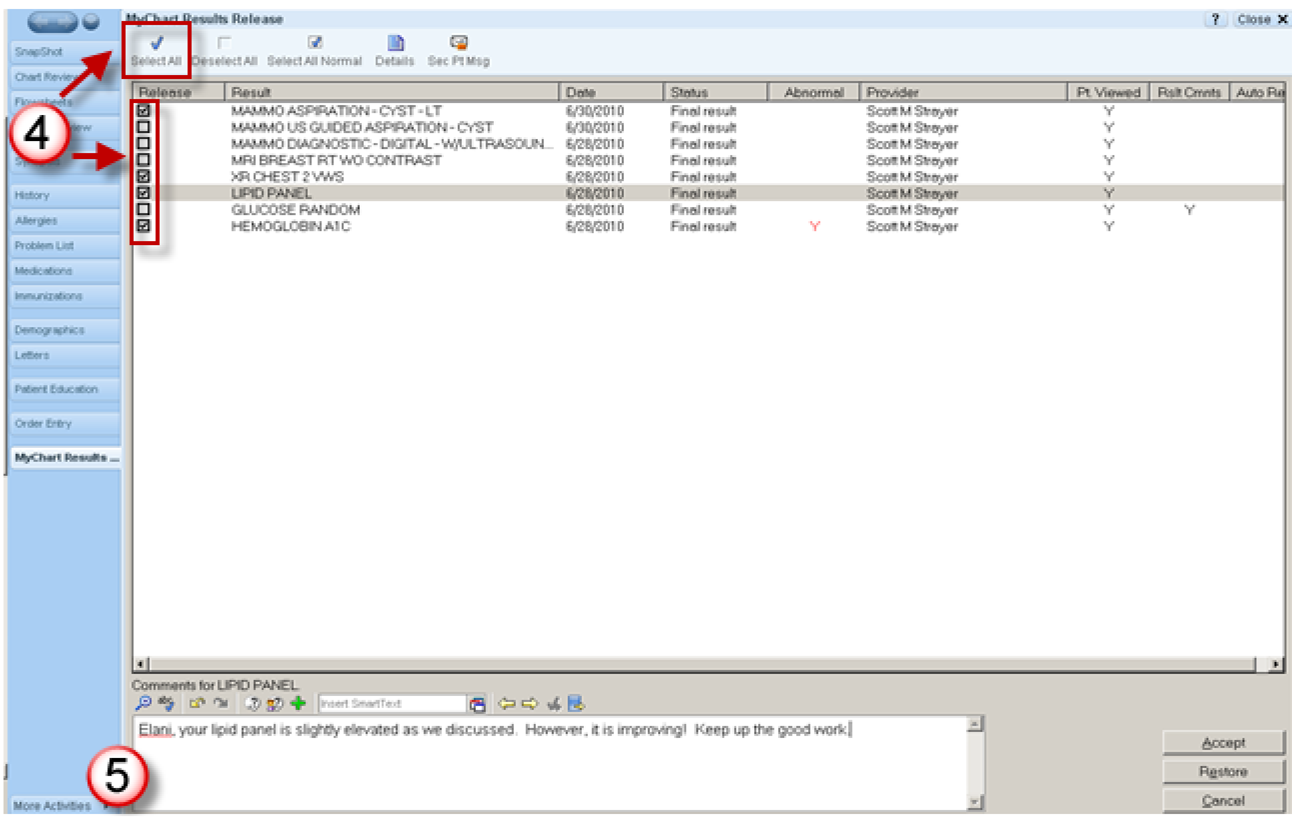
Use MyChart to Manage Results

LIPs, Physicians, Nurse Practitioners, Physician Assistants

Use the MyChart Administration Tool to Release Any and PAST Result

You can use the **MyChart Administration Tool** to release ***any*** results to a patient for them to view in MyChart. You can also add a comment about the result to help the patient understand what it means or provide encouragement for a job well done (lower cholesterol levels for example)

1. Go to the **Epic** button on the upper left of your screen.
2. Click **Tools > Patient Care Tools > MyChart Utilities > MyChart Results Release**.
3. Select the patient that you want to release results to by entering the patient name, or MRN in the patient search field.
4. To release all results click the **Select All** button and then click **Accept**.
    - To only release certain results, check the box next to the desired result to release.
5. Result comments can be entered for each individual result by selecting the result and typing a comment in the field at the bottom of the screen.



Remove Results from MyChart

Click the **Pt. Viewed** column header to sort on that column. The letter Y appears in the column if the patient has viewed the result. Clear the check boxes for unviewed results (results without a Y in that column) that shouldn't be viewed in MyChart.

Find out Whether a Result was Automatically Released to MyChart

Click the **Auto Rel** column header to sort on that column. If a result was automatically released, Y appears in the column

Use MyChart to Manage Results

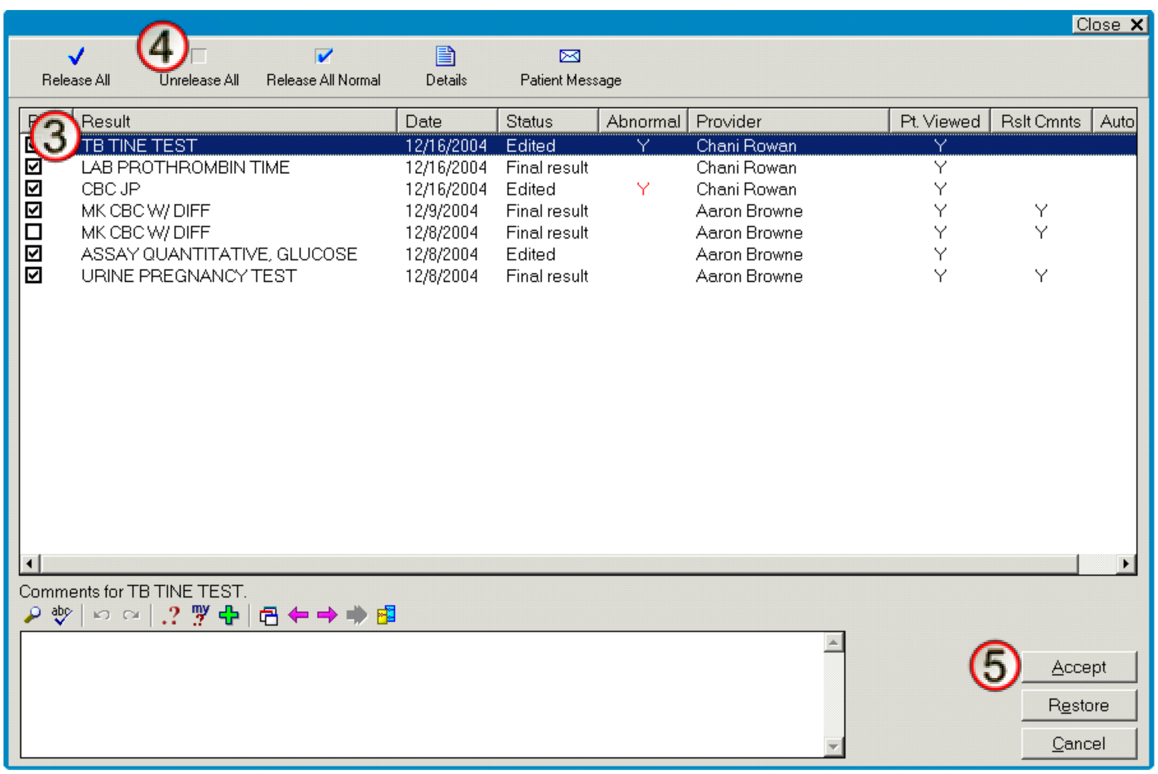
LIPs, Physicians, Nurse Practitioners, Physician Assistants

Remove a Released Result from MyChart

Releasing test results to patients using MyChart helps patients receive results quickly and conveniently. However, sometimes you might want to remove a test result from MyChart. This might happen if, for example, a result is released to MyChart, but you want to discuss it with the patient before she reads it.

***Please note:* Once you review a normal result in your In Basket, it is automatically released to the patient in MyChart (except HIV, PAP, etc.)**

1. In your Results In Basket folder, right-click the message about the result you want to remove from MyChart.
2. Select **Result Rel**. The MyChart Results Release activity opens.
3. Select the check boxes next to the results you want to remove from MyChart
4. Click **Unrelease All**
5. Click **Accept**. Follow up with the patient about the result by phone.



Find if a Result Has Been Released to MyChart

You can tell whether a result was released to MyChart by checking the MyChart indicator in the top right corner of your result message. A status of Released indicates the result has been released to MyChart.

Some results are not released to MyChart automatically, so you should discuss these results with patients and manually release them if needed. These results include cytology, radiology, pathology, etc.

MyChart Messages

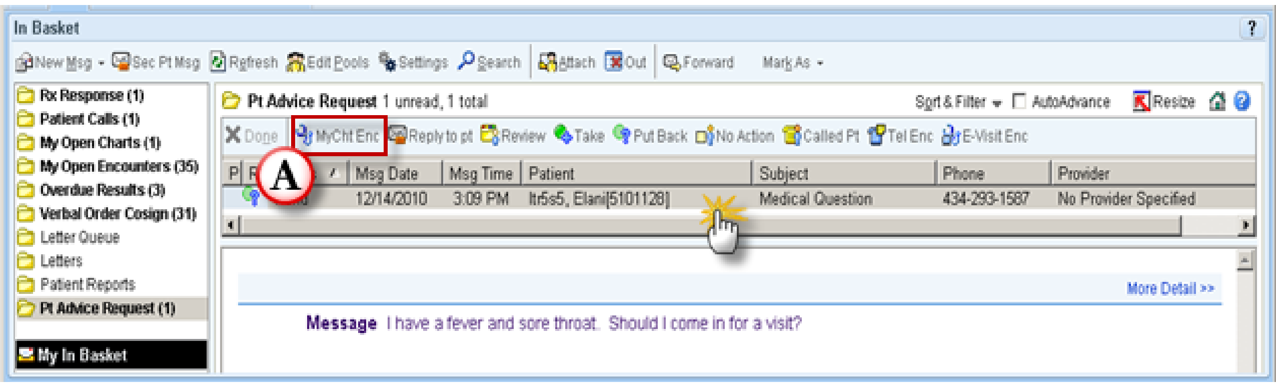
Clinical Support, RNs, LPNs, PCA/PCTs, Techs

Use Your In Basket to Reply to a Non-Urgent Patient Message Sent from Their MyChart

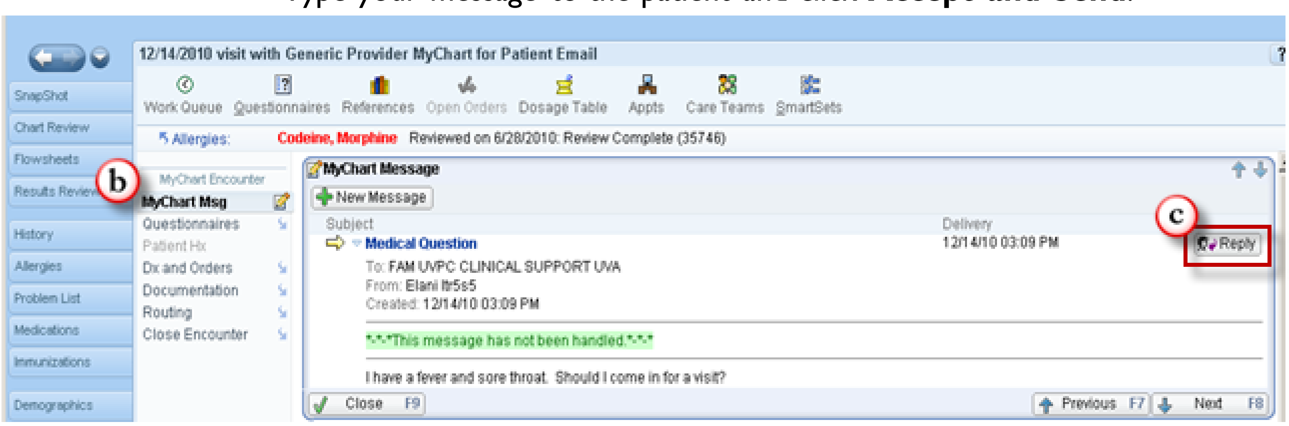
When a patient sends a message in MyChart requesting medical advice about a non-urgent issue, you receive the message in your In Basket. You may want to reply to the message, document the patient's issue further in an encounter, or forward the message to someone else in the clinic.

Reply to the Message from in Your In Basket Using a MyChart Encounter

1. Open your In Basket and select the message in the **Pt Advice Request** folder.



2. To document on the health issues and reply to the message choose one of the following two options.
   A. Click **MyCht Enc**.
      a) A MyChart encounter opens
      b) Open the MyChart Message section of the Visit Navigator and click **Reply**.
         - Type your message to the patient and click **Accept and Send**.



Document the issue, place orders, and route the encounter to another provider using the Documentation, Meds & Orders, and Routing sections also found in the MyChart encounter navigator.

Reply to the Message from Chart Review

Later, you can review the encounter in Chart Review. To reply to the patient:

1. Click **Reply to pt**.
2. The Secure Patient Message activity opens.
3. Type your message to the patient and click **Accept and Send**.

MyChart Messages

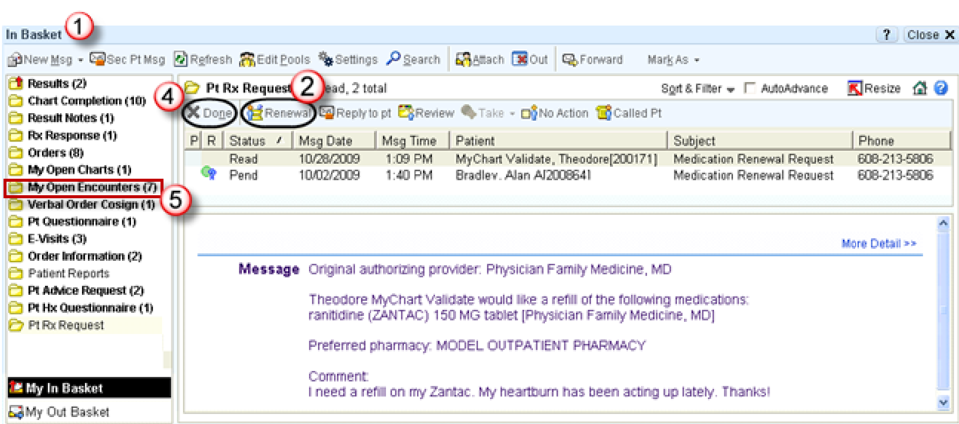
Clinical Support, RNs, LPNs, PCA/PCTs, Techs

Using your In Basket to Manage Medication Renewal Requests

Medication renewal requests come into your In Basket. When you receive the message, you open a refill encounter and then route the request to the appropriate physician. When the physician has approved or refused the request, you receive a notification message in In Basket and close the encounter. The patient automatically receives a notification that the medication was renewed or refused in MyChart.

To Open a Refill Encounter

1. Open In Basket and select a message in the Pt Rx Request folder.
2. Click **Renewal** to open an encounter for the medication renewal.
3. A refill encounter opens. Follow these steps:
   - Enter any necessary encounter documentation.
   - Open the Routing section of the Visit Navigator.
   - Enter the authorizing provider in the **Recipient** field.
   - Exit the workspace to route the encounter to the physician.
4. In your In Basket, click **Done** for the original message.
5. After the physician approves or refuses the medication, you'll receive the encounter in your In Basket.
6. Open the Rx Response folder and locate the correct message.
   - If you need to document on the encounter further, click **Enc** to do so.
7. Click **Close Enc**. A message is automatically sent to the patient regarding the renewed or refused medication.
8. Click **Done**.



Quickly Add the Primary Care Provider (PCP) to the Recipients List

Click **Add PCP** in the Routing section of the Visit Navigator to quickly add the patient's primary care provider to the recipients list.

Change the Patient's Pharmacy

Change the Pharmacy – go to Demographics/Clinical Information to update or choose a different pharmacy.

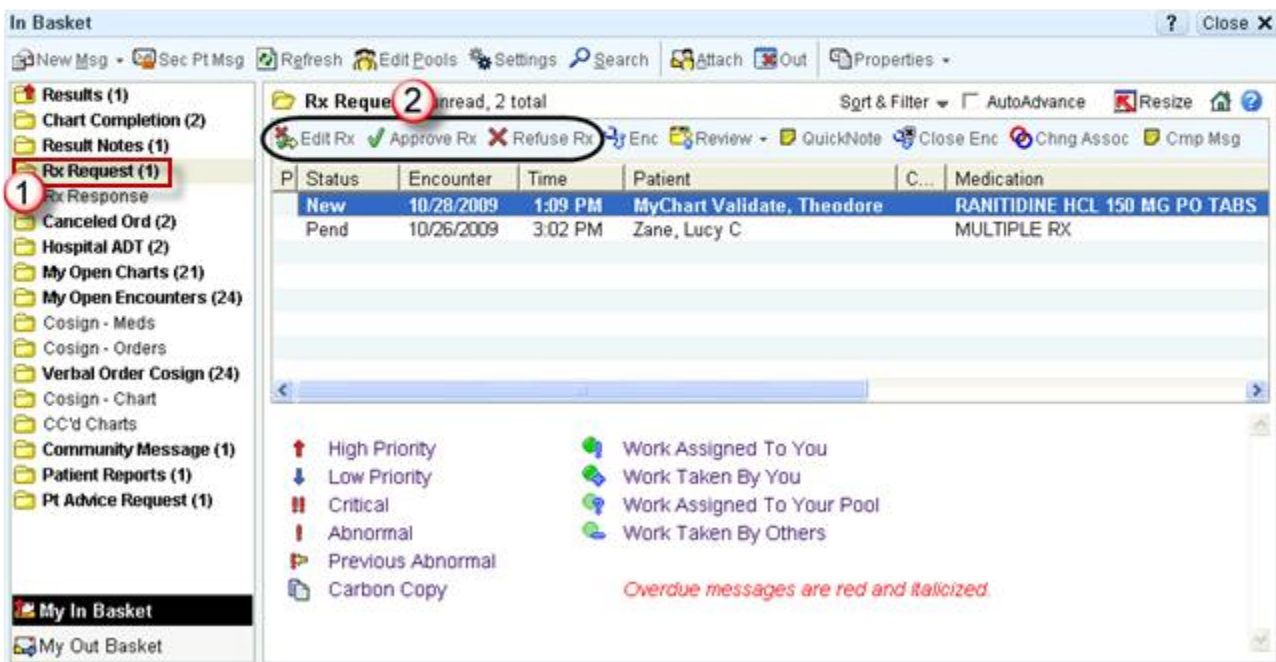
MyChart Messages

LIPs, Physicians, Nurse Practitioners, Physician Assistants

Manage Medication Renewal Requests from a Pool

Medication renewal requests come to your *clinic pool*. First, a nurse opens the message and creates an encounter for the renewal. Then you must approve or refuse the request. Afterwards, the patient receives a notification regarding the renewal or refusal.

1. Open In Basket and select a message in the Rx Request folder.
2. Approve or refuse the medication request.
   - To approve, click **Approve Rx** and enter your password.
   - To refuse, click **Refuse Rx** and select a reason, such as **Patient needs an appointment**.
3. If the request includes multiple medications, you can click **Edit Rx** to approve some and refuse others. Select the **Approve** ( ) or **Refuse** ( ) option next to each medication to indicate your decision.
4. The Rx Request message is marked as **Done** and the system sends the prescription to the appropriate location.



Modify the Number of Refills and Refill End Date

Click **Edit Rx**. Associate the medication with a diagnosis (or change the association) by clicking Chng Assoc (Chng Assoc)

Change the Pharmacy

Go to Demographics/Clinical Information to update or choose a different pharmacy.

MyChart Messages

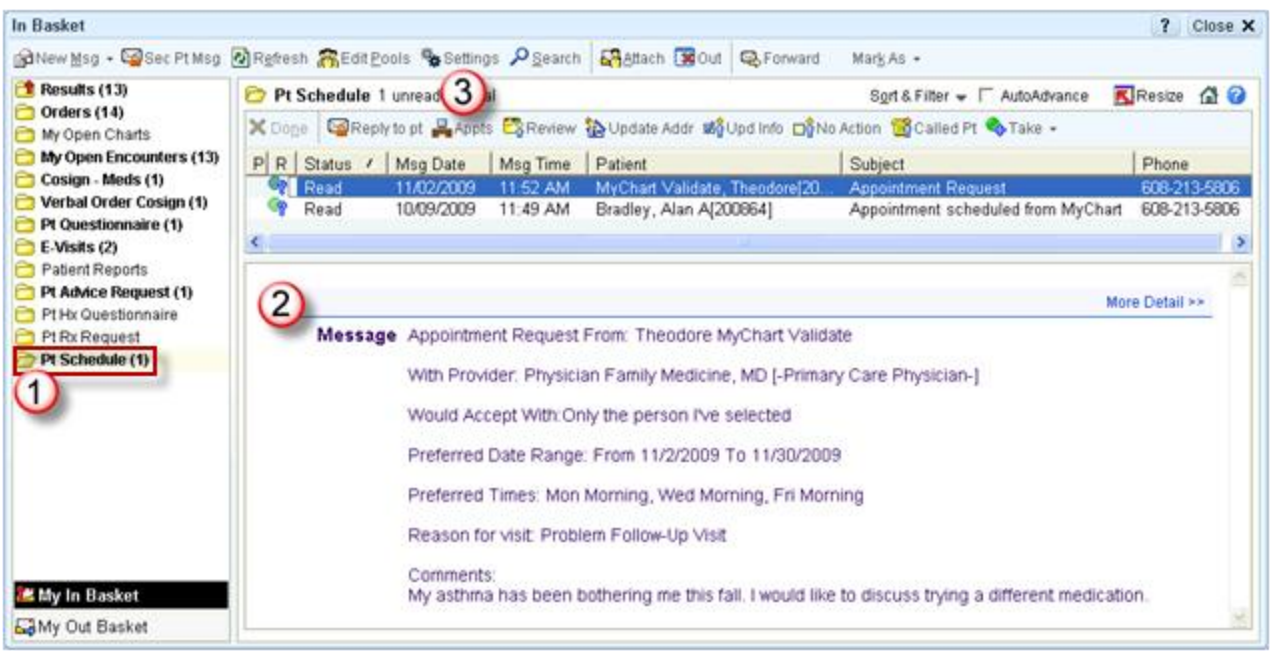
Clerical Support, Front Desk, Administrative Assistance, MyChart Pool Members

Schedule an Appointment Requested From your In Basket

You can schedule appointments for a patient based on a request sent from MyChart. The patient can specify who she would like to be seen by, the date range she'd accept for her appointment, a reason for visit, and comments about why the appointment is needed.

After you schedule an appointment, the patient automatically receives a notification in MyChart that an appointment has been made in A2K3. A2K3 information flows to Epic and MyChart but not from Epic. ***Procedure visit appointments DO NOT show in MyChart.***

1. Open In Basket and select a message in the **Pt Schedule** folder.
2. Look at the details of the appointment the patient has requested. This might include a requested provider, appointment days, appointment times, or a reason for visit.
3. Schedule the appointment in **A2k3**.



Let a Patient Know There are No Appointments At Their Desired Time

Click **Reply to Pt** to send a message to let the patient know that no appointments are available for a time range or to ask her to call to schedule a particular appointment type.

Click the **More Detail** hyperlink in the upper right corner of the message pane to view your message

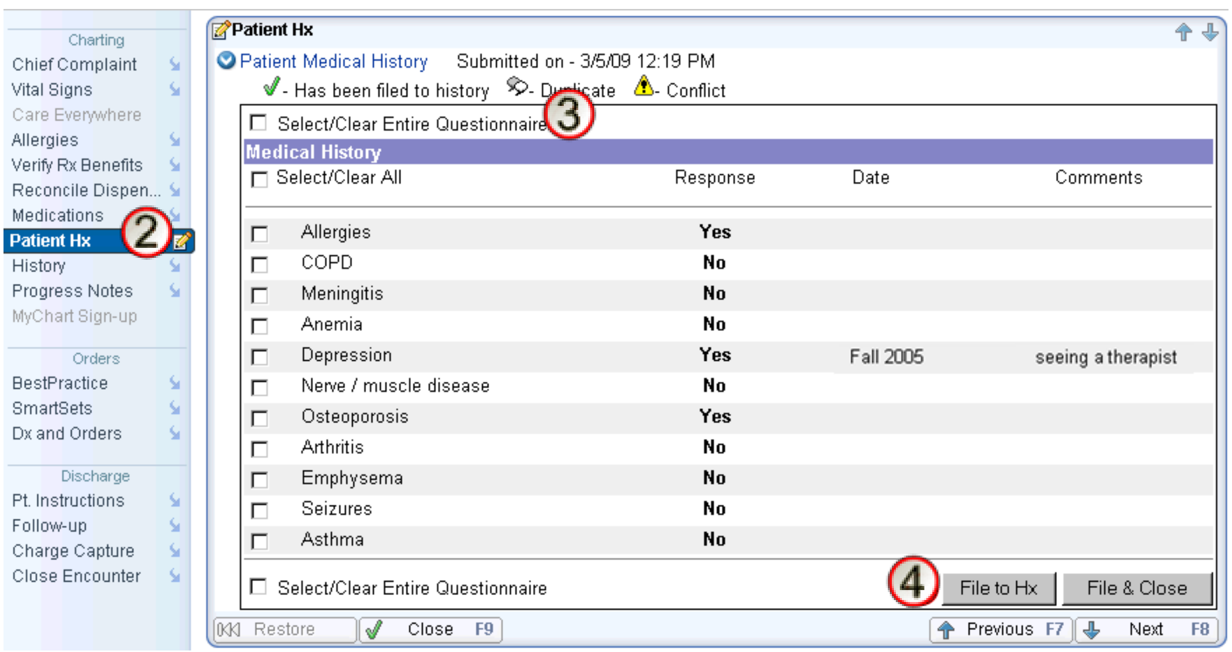
Updating a Patient's History

Clinical Support, RNs, LPNs, PCA/PCTs, Techs
LIPs, Physicians, Nurse Practitioners, Physician Assistants

Update the Patient's History during the Visit using a MyChart Questionnaire

Patients can use MyChart to update their medical history by completing history questionnaires online, saving you time during visits. You can review a completed history questionnaire and update the patient's history in Epic with just a few clicks.

1. During a visit, open the Visit Navigator.
2. Click the **Patient Hx** section (this is visible if the patient has completed a history form)
3. Select the individual responses you want to file or click **Select/Clear Entire Questionnaire** to select all of the responses.
4. Click **File to Hx**. The responses now appear in the **History** section as well.



Review the Filed History Information

Review the history information you filed by opening the History activity. History filed from a questionnaire appears with the patient reported icon.