

EPIC CHECKLIST FOR INTERNS

- Format personal schedule view:** (click on gears)
 - Remove: Status
 - Controlled substance monitoring
 - My chart
 - Referring provider cred
 - CSN
 - Add: Status (17306)
 - PCP (17316)
 - DOB (17314)
 - HCC gap
 - Hosp or ED adm risk (%)

Place in this order:

 - Appt Time
 - Status
 - Patient
 - Age/Sex
 - DOB
 - Notes
 - Provider
 - HCC gap
 - Hosp or ED adm risk (%)
 - PCP
 - Last abstracted

- Learn how to view provider calendar**
 - Go to EPIC/scheduling/provider calendar*
 - Select the provider you are searching
 - Now that it appears on the navigation panel on the left, **click the pushpin** to the right of “provider calendar” so that you won’t have to search for it again.

- Create a preference list**
 - Go to EPIC/tools/preference list composer
 - Select “copy user” and use “TAN, STEPHANIE”
 - Select “Orders (outpatient)” and “Other (outpatient)” then click “copy”
 - Format list as desired

Note: Copied lists are not dynamic, ie if changes are made to the owner’s list, they will not transfer to the users who have copied the list before the changes.

- Learn how to add smartphrases**
 - Go to EPIC/tools/smartphrase manager
 - Select “TAN,STEPHANIE,” select all phrases, and click “share” to bring up a box to add yourself
 - Or open a phrase to review it, go to the “Owners & Users” tab, then select “add myself.”

Note: Smartphrases can only be changed by the owner of the phrase. When a phrase is changed, it changes for anyone using the phrase in the future.

- Learn how to add speedbuttons**

- Grant permission to all residents and attendings in the program** (see list provided). If you do not do this, you will not get coverage when you are not available.