Epic Tip Sheet for Primary Care Clinic

Attaching your In-baskets

1. On In-basket tab - go to Attach

2. Go to Grant

3. Add your Clinic Trio members AND attending

4. You will need to Accept your Trio members' in-baskets as Persistent Attachments - done from the General tab under the initial Attach icon. This can be completed once you are Granted access by your fellow Trio members.
• **Accessing Epic on your Smart Phone** - Downloading Haiku App
  - Good ONLY for viewing results, not following-up
    - Download the Haiku App to your cell phone
    - Once app is downloaded, go to the following link (using your phone) and login with your EPIC username and password: [https://hku.gmh.edu/welcome.html](https://hku.gmh.edu/welcome.html) (scroll to the bottom of the website for the section that says “Access”)
    - The haiku app allows you to forward your results to your nurse. **However, this should not be done unless circumstances are emergent and you can’t contact patient yourself.**
    - If you are off-site from Grady and using the Haiku app for a lab that needs to be addressed immediately, please contact the attending you signed out with to discuss. If you need to immediately contact the patient but have no EPIC access, you can call Grady Nurse Advice at 404-616-0600. They can reach out to the patient with your management plan and leave documentation in the chart (so you won’t have to worry about doing this if you are off-site and can’t access EPIC).

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**Assigning yourself as PCP**

1. Open Chart, select ‘SnapShot’ tab
2. Select Care Team and Communications

3. Search for yourself at ‘Search for PCP’ tab
4. Under Admissions, select ‘Yes’ and ‘Abnormal’ and hit Accept

Medication Refills

1. Where can I find the prior Rx data? 3 options:
   A. Medications tab under Visit Navigator
B. Medications tab under regular chart review

C. Meds and Orders tab under Visit Navigator
How to Reconcile and Reorder at the same time

1. Meds and Orders – select Options, select Choose Columns, select Taking

2. Click boxes next to meds currently taking and reorder, change OR discontinue
The “Mark as Reviewed” tab should be clicked on the “Meds & Orders” tab to meet Meaningful Use criteria (*Note, this is less critical for documentation purposes but is important for us to get credit for our work):

![Meds & Orders screenshot]

**Problem List Updating**

1. From the Visit Navigator, go to Problem List tab
2. Select Diagnosis, use drop down arrow
3. Select Resolve to Remove
4. Add new problem as appropriate

![Problem List screenshot]
You can easily move things from the "Visit Diagnoses" to the "Problem List" by clicking this button:

Similarly, you can move things from the "Problem List" to "Visit Diagnoses" by clicking a similar button of the "Problem List" menu:
Two New Dot Phrases – Problem List

Active Problem list for note within overview/recent history portion → .problovnote
Visit diagnoses and tests ordered into A&P portion → .assessplan

Lastly → Refresh your note!