Medical Staff Special Briefing

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Baylor Scott & White June 27 Epic Implementation

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Physicians & APPs
Provider Checklist

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Now

- ✔ Experienced Epic users who want to bypass Epic training take Test Out on your **Learn.BSWHealth.com** training dashboard

- ✔ Confirm your My Choice training:
    - Computer-Based Training (CBT) **OR** register for your in-person class on your **Learn.BSWHealth.com** training dashboard

- ✔ Register for a personalization lab (even if you tested out of training)

- ✔ If you are non-HTPN* ensure your office staff register for EpicCare Link (*office staff of HTPN follow a different process)

- ✔ Complete ID verification with Medical Staff Services for electronic prescribing of controlled substances in Epic

Now through June

- ✔ Complete My Choice training:
    - Confirm passing grade on Test Out **OR** completion of your CBT on your Learning transcript
    - If you chose classroom training, confirm completion on your Learning transcript or attend class (5/11 – 6/19)

- ✔ Attend your personalization lab (6/8 – 6/26)

June 27, 2020

- ✔ Epic go live

Questions: Email **EpicTraining@BSWHealth.org** or call **214-820-4367**.
For information: myBaylorEMR.com EHR Resources, **BSWconnect.com** Physicians Portal

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Note: HealthTexas Provider Network (HTPN) physicians/APPs using EPIC outpatient are exempt from inpatient training and personalization labs **IF** they do not see inpatients.

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Physicians & APPs
Your Epic Personalization Lab

Saves Time and Enhances Efficiency

- During personalization labs, you will learn how to set up your personal preferences for notes, orders and order sets with assistance from a physician informatics facilitator.

- If you are unable to complete your personal preferences during the lab, you will have the necessary skills to continue independently.

What to Bring:

- Laptop (recommended)
    - Enables you to access content from other systems during your lab.

- Your colleagues
    - Personalization labs are more effective when you attend with other physicians from your specialty.

- Mobile devices (smartphone and/or iPad)
    - For help in downloading the Epic apps, Haiku or Canto.

Epic Training: **214-820-4367** or email **EpicTraining@BSWHealth.org**

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Physicians & APPs

Medical Staff, HIM and Other Changes with Epic

Med Staff Update

In order to have access to ePrescribing of controlled substances, the Medical Staff Office is required to perform a face-to-face ID verification. Please stop by the Medical Staff Office with a valid picture ID issued by a State or Federal agency (e.g. driver's license or passport). ePrescribing also requires the two-factor authentication app (SecureAuth) on your mobile phone. This tip sheet (included with this packet) walks you through the process.

Omnicell Update

Physicians who work with Omnicell dispensers need to re-register their fingerprints for the dispensing cabinets. The Pharmacy will be contacting those impacted before Epic go live.

Shared Services

Review the 15 minute CBT (Computer Based Training)

Epic Shared Services Provider Course
Due: No Due Date   Status: Registered

View Training D...

for providers with cross over patients at BSW The Heart Hospitals — Denton, Plano, McKinney. This training covers the Shared Services, One Way and Round Trip provider workflows.

Health Information Management Updates

CHART COMPLETION

Allscripts Chart Completion

- Chart completion for Allscripts discharged visits will continue to be in Allscripts Deficiency Viewer.

- To dictate Allscripts visits, use Allscripts-related dictation instructions. Several values are different between Allscripts and Epic dictation.

- Use Allscripts to complete any documentation initiated prior to June 27. Use Epic to complete any documentation initiated June 27 or later. The patient record for crossover patients will be split between Allscripts and Epic.

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Epic Chart Completion

- Many Epic chart completion items are automatically assigned real-time during a patient visit. Items include missing signatures, H&P, Operative Report and Consultation. Here is when you will see each in your InBasket:

DEFICIENCY	ARRIVES IN INBASKET	DUE DATE = TURNS RED
History and physical	Immediately after admission entered	24 hours post admission
ED Provider Record	Discharge from ED	7 days later
Telephone/verbal orders signatures	Immediately after entry	96 hours later
Operative Reports (Op Time)	Assigned at the time patient is moved into the OR	7 days later
Discharge Summary	For patients > 2 Midnights at time discharge completed by Bed Control/Access	7 days later
Present on Admission (POA) indicator	Assigned to any active diagnosis on the Problem list at the time a patient is registered at a facility, or a new problem is added	7 days later
All other deficiencies		7 days later post event

- Missing dictation — The timeframe to complete dictate/document absent reports INCLUDES the signature completion. The delinquency clock in Epic does not reset after dictation, giving the provider extra days to wait for the transcription to return for signature.

- Items in provider InBasket turn red when they become delinquent (due) and eligible for suspension. Completion of all items prior to or when they turn red will keep the provider from being placed on suspension.

- Incomplete items will be in provider Epic Chart Completion InBasket, in addition to multiple other folders. InBaskets should be checked daily for chart completion items.

- Delinquent reminders will be sent on Mondays.

- Suspension notices will be sent and posted on Wednesdays.

Historical Documentation

Allscripts

Data Archiving from Allscripts and 3M began with 2018 discharges by age of account, NOT by facility. Archiving will continue to extract backward by year. Complete 2020 data will not be extracted until all implementing facility Allscripts accounts have been completed by providers. Providers must continue to access **myBaylorEMR** or Allscripts for pre-Epic documentation. Until archiving is complete, please check both systems for complete patient history.

Epic

As historical data is archived, providers will review it in the Onbase tool accessed within Epic under:

Historical Data
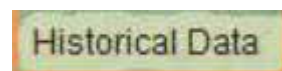
As of June 30 Medhost is View Only

Use downtime documentation tools for incomplete Medhost documentation. HIM will pick up paper and scan into appropriate system. For any paper created as of 0800, June 27, scanning will transition to the ED Staff.
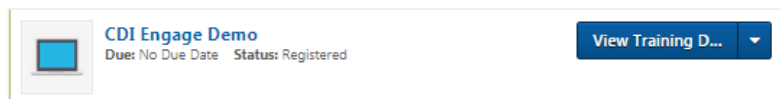
New Query Process Tip Sheet

The software for responding to documentation queries will change to Fluency Direct/MModal CDI Engage.

- In addition to seeing queries, providers will see a new feature called automated nudge. This utilizes a NLU tool to send real-time nudges to providers while they are entering Epic notes.

- eMD queries will now be referred to simply as manual queries in order to differentiate them from the automated nudges that are being shown.

- Manual queries and automated nudges are delivered through Fluency Direct when a provider logs on to Epic.

The process of creating and sending queries by CDI and coders remains the same. They just present differently in Epic.

- CDI Engage is intended for attending physicians and APPs. Residents are not involved in the workflow of viewing/answering queries and will not see the automated nudges.

- During your personalization lab you will be shown the CDI EngageOne computer-based training module that is assigned in **Learn.BSWHealth.com**. This is a 5-minute video summary. A pocket guide is also available.

CDI Engage Demo
Due: No Due Date   **Status:** Registered

[View Training D... | ▼]

Answering Queries Options

Only senior staff or APPs can click on these answer options*

- **Diagnosis options:** These options will automatically create a **Query Note** that will appear in Epic with the diagnosis you have selected. You can still addend the **Query Note** in Epic if needed.

- **Respond – Create new note now:** The 360 MD panel expands so you can immediately add the information to the medical record.

- **Dismiss – Not applicable/Not valid:** Select if you disagree with the question posed (you can also include comments).

- **Dismiss – Clinically unable to determine/Unknown:** Use this option if you are unable to determine an answer to the question. This option will NOT generate an Epic note.

- **Defer – Ask again later:** This options saves the request in your patient list in a section labeled "Deferred" so you can address it later.

- **Refer to Clinical Documentation Reviewer:** Use this option to send a short message to the Reviewer.

*Continue to update the Hospital Problem List (HPL) with any new diagnoses and document these in the progress notes and discharge summary. View **HPL tip sheet**.

Dictation System — Work Types, Facility Codes, Keypad Functions

New dictation cards for badges are available in HIM and Medical Staff offices one week prior to go live. The cards include new work types, facility codes and keypad functionality details. Alternatively, take a picture of the eCard and save it to your phone. Information is also posted on **myBaylorEMR.com** and in the facility.

What is Changing

- Facility ID (reduced to 3 digits)
- In-house speed dial numbers – aligned to 42-6008 for all NTX sites
- All work types
- Patient identifier becomes the Epic CSN
- Keypad commands for pause, fast forward, STAT, and disconnect/job#

What is Not Changing

- Dial-up number
- Provider ID#
- Keypad commands for Record, Rewind, End Report/New Dictation
- Medical transcriptionists that type/edit your reports

These changes are after a facility goes live on Epic. For facilities still live on Allscripts, continue to use the current processes and dictation numbers.

North Texas Dictation Numbers – Epic

Effective June 27, 2020

Take a picture and save to your phone.

Dictation Instructions

1. In house, dial extension 42-6008.
2. Outside of the hospital, call 1-844-223-7450.
3. Enter Provider ID, followed by the # key.
4. Enter Facility ID, followed by # key.

Hospital	Facility ID
BSW Medical Center – Centennial	318
BSW Medical Center – Fort Worth	303
BSW Medical Center – Grapevine	307
BSW Medical Center – Irving	306
BSW Medical Center – Lake Pointe	319
BSW Medical Center – McKinney	315
BSW Medical Center – Plano	301
BSW Medical Center – Waxahachie	305
BSW University Medical Center – Dallas	309
BSW Heart and Vascular Hospital – Dallas	310
BSW Heart and Vascular Hospital – Fort Worth	310
BSW The Heart Hospital – Denton	317
BSW The Heart Hospital – McKinney	302
BSW The Heart Hospital – Plano	302

5. Enter work type, followed by the # key
6. Enter the CSN (Contact Serial Number), followed by the # key (CSN is located in the Epic patient header)
7. Press 2 to record. Verbally state patient name, CSN, and the Medical Record Number
8. To dictate another report, press 5. This will end current dictation and begin new
9. Press 8 to disconnect from dictation system. Please do not hang up the phone before disconnecting

Work Types

- **2** = Operative Reports (Patient in OR)
- **3** = Discharge Summary
- **6** = H&P
- **7** = Procedure Note (Patient in bed/procedure area)
- **8** = Consultation
- **13** = Pre-Op H&P
- **38** = Letters

Telephone Keypad Mapping

- **1** – Pause
- **2** – Record
- **3** – Rewind/Play
- **4** – Fast Forward
- **5** – End of Report/New Dictation
- **6** – Mark Report Stat
- **7** – Rewind until interrupted
- **8** – Disconnect/Job #
- **9** – Go to Beginning/Play
- **0** – Play/Listen
- ***6** – Play Job Number

To Review Dictation

1. Dial 1-844-223-7450
2. Enter your Provider ID followed by the # key
3. Press # (a second time)
4. For the listen line, press 3
5. To listen by:
   a. confirmation number, press 1
   b. by CSN, press 2
6. Enter the confirmation number or CSN followed by the # key

Downtime Phone Number

1-857-995-6071

New dictation cards for badges are available in the HIM office.

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EpicCare Link

Non-HTPN* office staff get ready for Epic Go Live June 27

Office staff will need EpicCare Link access to:

- Access clinical documentation (H&Ps, progress notes, op notes, consult notes, discharge summaries, Emergency Department notes)

- Access test results: labs, imaging, and pathology results

- View information needed for patient coding and billing

How to request access to EpicCare Link:

- Go to **BSWH.md/EpicCareLinkInfo** and click **REQUEST ACCESS**

- Each applicant must review the **HIPAA Training** prior to submitting the access request form

New site/practice request for access

- For medical practices and post-acute facilities, authorizing physician/authorizing director must complete the **new site authorization form**

- Use the online **EpicCare Link access request form** to submit a request for a new site/practice and attach the authorization form

- The online access request form must be submitted by the designated site administrator identified on the form

Adding new users to existing site/practice

- New user requests for an existing site/practice must be submitted by the site administrator

  - Log into EpicCare Link at **EpicCareLink.BSWHealth.org**

  - Go to the **Manage My Clinic** tab, select **Requests > Request New Account**

For access issues: call the IS Service Center **214-865-4357 (HELP)**, select **option 1**, then **option 2** for providers

For questions: email **EpicCareLink@BSWHealth.org**

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*Office staff of HealthTexas Provider Network (HTPN) credentialed medical staff follow a different process.

Physicians & APPs
Using Epic Mobile Apps

Canto and Haiku are Epic's mobile apps that allow medical staff to complete work in Epic on the go. Maintain productivity and boost efficiency between appointments in the clinic, rounding at the hospital, or on call. Review up-to-the-moment clinical information and complete workflows including reviewing patient information, e-prescribing medications and responding to InBasket messages.

Through the Apps, Physicians Can Securely:

Find Patients

- Access patient lists
- Access outpatient and surgical schedules
- Search the database for patients

Provide Patient Care

- Review past inpatient or outpatient encounters
- Document notes
- Capture clinical images and videos
- Document professional charges
- Free-write quick reminders in patient encounters
- Review past notes
- Review lab results
- E-prescribe medications

Manage Communication

- Customize push notification settings for various communication alerts
- Review and act on InBasket messages containing lab results or information from colleagues
- Read and respond to patients' requests for medical advice

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How to Set Up Haiku and/or Canto to Access BSW Epic:

Canto for iPad: Download "Epic Canto" from the App store

Haiku for iPhone: Download "Epic Haiku" from the App store
Note: Haiku requires iOS 10 or later

Haiku for Android: Download "Epic Haiku" from the Google Play store.
Note: Haiku requires Android operating system 4.4 or later
(The official name of the Haiku app is Epic Haiku and Limerick)

Once the app is downloaded, log into the following website with your
Baylor Scott & White network ID and **Password**: **BSWconnect.com/epichaiku**

Click on the link for the mobile app you wish to configure,
then click **Open**
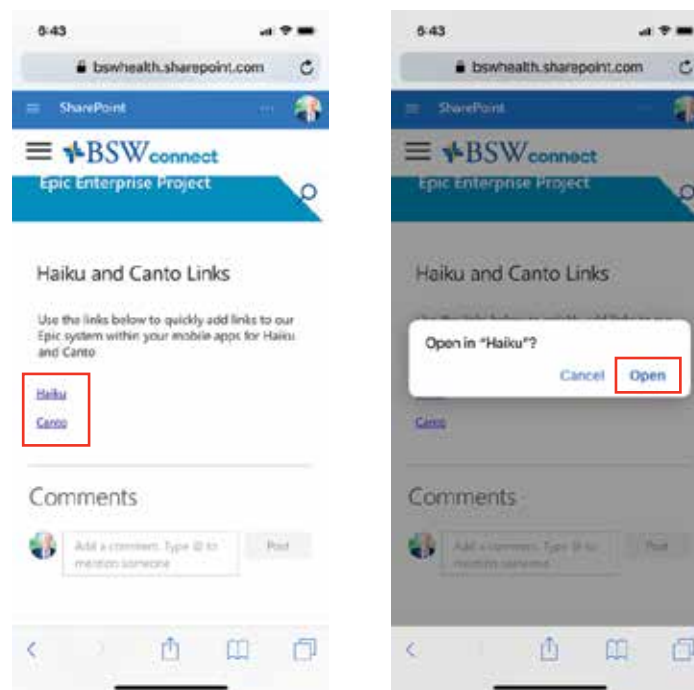
Using Haiku and Canto at Multiple Organizations
Haiku and Canto work with multiple organizations' instances of Epic. Once you configure
the app for more than one organization, you'll select the name from a drop-down menu
at the top of the login screen. For example, Baylor Scott & White's Haiku name is
"**BSWH Epic Haiku**."

For questions or support, call the IS Service Desk at the new number **214-865-4357 (HELP)**.

Guides are posted on **BSWconnect/Physician Portal**.

Physicians & APPs

FMH is Being Replaced by MyBSWHealth

FollowMyHealth® is being replaced by MyBSWHealth as the Patient Portal for INPATIENT and Ambulatory sites live on Epic

As Epic is implemented in North Texas hospitals, MyBSWHealth is replacing FollowMyHealth (FMH) as the patient portal for INPATIENT hospital data. MyBSWHealth seamlessly incorporates Epic's MyChart, but with added benefits. Patients can:

- Review and pay hospital bills
- Manage prescriptions at BSW pharmacies
- Search for providers on BSW medical staffs
- Connect with the Scott & White Health Plan
- View lab results
- View after visit summaries (on **MyBSWHealth.com**)
- Request/receive copies of medial records

Here's what non-HTPN medical staff need to know about the switch from FollowMyHealth® (FMH) to MyBSWHealth

Patients own their FMH accounts. Historic data will remain available to them. No data will be converted from FMH to MyBSWHealth.

There is very little difference between FMH and MyBSWHealth workflows. **INPATIENT HOSPITAL** lab result workflows are similar:

- There is a very short list of tests that go out immediately such as cholesterol.
- There is still a select list of test results that will never be auto-released, such as HIV.
- Unlike FMH, all other tests are held 3 business days (rather than 72 hours).

Patients who have connected with another health system's MyChart account need to set up a MyBSWHealth account to see their BSW health record.

*Patients of HealthTexas Provider Network (HTPN) who have a MyBSWHealth account will not need an additional account to see hospital data.

How patients without accounts connect to MyBSWHealth

- Patients download the MyBSWHealth app from in the App Store or Google Play.
- Like FMH, patients can set up an account for themselves or set up a proxy account for a family member. Proxy accounts are set up by completing the proxy access request form found on **BSWHealth.com/MyBSWHealth**.
- To connect when checking in: patients checking in to the hospital have the option of receiving a text with their access code and connecting with the app. Or they may choose to get a written access code and connect later via the app or website, **MyBSWHealth.com**
- To connect after discharge: the after-visit summary includes the patient's personalized access code needed to set up an account via the website. Instructions include how to download and use the app after the account is set up.

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myBSWhealth

Discover the app that makes patients and doctors happy.

Recommend the MyBSWHealth App 4.7 star rating (17k+ ratings)
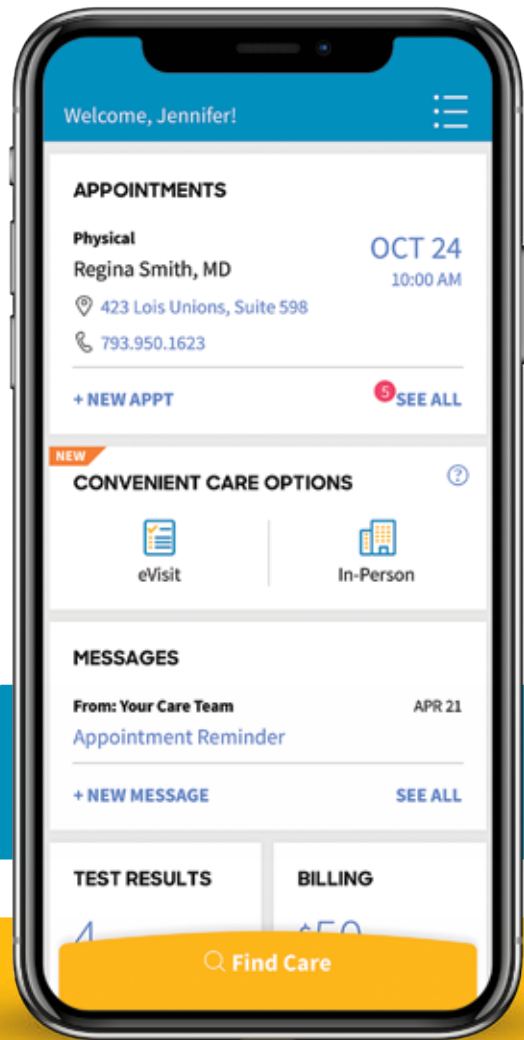
MyBSWHealth reduces staff time and much more. With the app, patients can:

◤ Review and pay bills to HTPN physicians at our hospitals and clinics

◤ Conveniently schedule appointments electronically

◤ Communicate one-on-one with their care team via messages

◤ eCheck-in prior to clinic visits, reducing registration times

◤ View lab results

◤ Complete a quick eVisit to provide better continuity of care

◤ Easily manage their prescriptions at BSW pharmacies

Physicians & APPs
Cutover Process

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Cutover Data Conversion Process: Friday, June 26			
6-26-20 8 a.m. to Noon	6-26-20 10 a.m. to 11:59 p.m.	6-26-20 10 a.m. to 11:59 p.m.	
Access Services	**Nursing**	**Pharmacist**	**Provider**
Admits Patient	Allergies	Active Medications	
Coverages	Height/Weight		
Authorizations	Immunizations		
	Code Status		
	Non-Medication Pending Orders		
	Lines, Tubes, Drains placement		
Recovery Data Conversion Process: Saturday, June 27, beginning 3 a.m.			
Admits Patient	Medications entered during downtime	New Medication Orders	Reconcile Problem List
Coverages	New Non-Medication orders submitted during downtime		Reconcile PTA Medications (Home Meds)
Authorizations	Vitals (last set for non-critical; last 4 sets for critical)		
	Intake/Output (Past 24 hour totals for each category)		
	Plan of Care		
	Education		

Red text denotes items that will be imported electronically rather than manually.

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Physicians & APPs
Epic Go Live Support

Super Users

Super users trained to support physicians and APPs are scheduled to provide at-the-elbow support during the first four weeks of go live. **Super users wearing orange lanyards will be rounding the hospital to support physicians and APPs.**

Super users wearing yellow lanyards will also be rounding and can provide support not specific to physician workflows.

The Service Desk's Command Center

The Command Center is staffed by analysts specializing in Epic. If you require additional troubleshooting, the analyst may transfer your issue to the provider support team or the appropriate Epic application team.

To reach the Service Desk's Command Center:

- Call **214-865-4357** and **press 0** for the Epic implementation

- This is the new number for the IS Service Desk. Previous numbers are auto-forwarding to this new number, including **214-820-4646**

- For non-urgent issues, put in a ticket at **ServiceCenter.BSWHealth.com**

OR

Get answers to quick questions. Use the QR code to connect with your Epic Virtual Super User.

Your virtual super user will contact you within minutes through your preferred method.

You can get quick help with:
- Any Epic application/module
- How/where to document in Epic
- Clarifying workflow steps
- Answers to quick questions

Your virtual super user cannot help with Epic not working as expected or urgent requests.

Physician Workflow Support

General Epic Support

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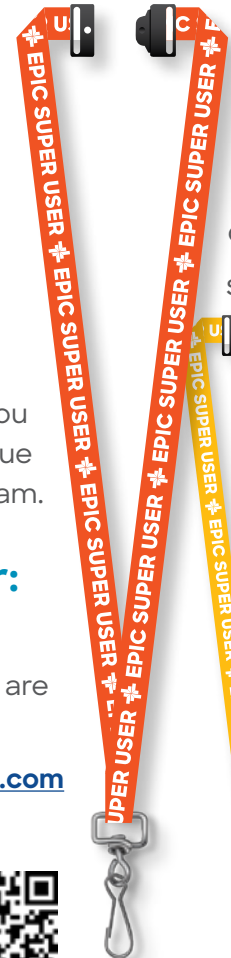
Medical Staff Tips & Scripting

Communication to Patients at Go Live

Patient should not be burdened with details of the EHR change
- To free you from trying to explain technology, refrain from making comments about the change to Epic

Be aware of loud conversations
- At Baylor Scott & White we are a community passionate about serving each other. As we support each other, help team members stay aware of keeping the noise down

Reassuring Patients at Go Live

Communicate
- Make eye contact, greet, smile and acknowledge the patient by name before turning your attention to the computer

Inform
- Explain their care plan
- Set expectations for their care
- Keep them informed

Listen
- Acknowledge any issue they bring up
- Align with them and let them know you have heard them

Take Action
- Assure them you are taking steps to resolve any issue they may have
- Assure their care is top priority

Medical Staff Scripting Examples

"I'm so sorry it's taking longer than expected. Thank you for waiting. I'm following up now."

Patient asks questions about care

Patient needs reassurance

"Thank you for your patience. I'm checking on that now. Is there anything else I can do for you while I'm here?"

"I have someone assisting me today with a new BSW process."

Patient notices the assistance of a super user

Patient questions workstations

"This technology helps assure safe, consistent care."

MyBSWHealth

Note:
If patients ask about the new patient portal, MyBSWHealth, information will be in the After Visit Summary on discharge

Tip Sheets

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Physicians & APPs
Experienced Epic Users

Test Out Tip Sheet

Test Out: Take and pass the Specialty Assessment which tests Epic specialty workflows to bypass training, complete personalization lab

Test Out Option ›› **Pass Specialty Assessment** ›› **Complete Personalization Lab**

For the Test Out option, use your BSW network credentials to access the Specialty Assessment on Learn.BSWHealth.com.

- The assessment times out after 90 minutes, and once complete results are immediately available.

- If you receive a score of 70 percent or higher, all that remains is your personalization lab.

- To contact Test Out support, email **EpicFastPass@BSWHealth.org** or call 214-820-4367.

Here's How to Register Online:

You have been assigned courses in the learning management system (LMS) based on your specialty. Follow this tip sheet to view your curriculum and register online. If you prefer, you can call or email **Epic Training** to register. Calls are answered Monday – Friday, 8 a.m. to 5 p.m. If calling after hours, your call will be returned the next business day. Reach **Epic Training** by calling **214-820-4367** or email **EpicTraining@BSWHealth.org**.

Go to **Learn.BSWHealth.com** and log in with your Baylor Scott & White credentials. On the welcome page, click the **My Transcript** button to view your classroom courses.

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You'll see your training dashboard with My Choice learning options — Test Out, preferred in person session or computer-based training (CBT). Choose Test Out and **Launch** to start.

Registration for your Personalization Lab:

To register for your personalization lab, click **Open Curriculum** next to the course, then click **View Details** next to **Events**.

Click **Select Session** next to the event you want to schedule. You can only request one session at a time per event.

A new window will open with a list of dates/ times and the number of seats available for your class and lab. Click **Request** to select a session. All sessions have a MCK/P/THH tag.

Lab Registration Confirmation:

You will receive an email to your Baylor Scott & White email address with an attached calendar invite confirming enrollment. To access your BSW O365 email account, log out of any other O365 accounts you may have, go to **http://webmail.bswhealth.org** and log in using your current BSW credentials. If you have questions contact **Epic Training**. Don't respond to the email from **Trainer@BSWHealth.org**.

Get on a Lab Waitlist:

If there are no available seats in a session, click **Request** to be placed on the waitlist. Once a seat becomes available, priority goes to those on the waitlist in the order requested. You will receive an email when you are added to the waitlist and another email when you move from the waitlist to the roster. Please note, class size has been reduced to accommodate social distancing.

Withdraw from a Lab:

Locate the event from your transcript and click **View Training Details**. From the drop-down arrow, click **Withdraw**. Under **Session Withdraw Options**, select a reason for your withdraw. Then click **Submit**. The status of your event will change to withdrawn. Click the **Select Session** button to request another session.

View sessions you are registered for and status by clicking **Your Upcoming Sessions** on the **Learn.BSWHealth.com** welcome page.

For Learn access issues: Call **PeoplePlace 844-417-5223, Option 2**
Calls are answered Monday – Friday 7:30 a.m. – 5 p.m.

Questions: Email **EpicTraining@BSWHealth.org** or call **214-820-4367**.
For information: myBaylorEMR.com EHR Resources, **BSWconnect.com** Physicians Portal

Physicians & APPs
My Choice Training Options

Three options to get Epic inpatient access:

Test Out: Take and pass the Specialty Assessment which tests Epic specialty workflows to bypass training, complete personalization lab

Test Out Option	>>>	Pass Specialty Assessment	>>>	Complete Personalization Lab

eLearning: Take required computer-based training (CBT), pass the Specialty Assessment, complete personalization lab

eLearning Option	>>>	Complete eLearning	>>>	Pass Specialty Assessment	>>>	Complete Personalization Lab

Classroom Training: Attend classroom training, pass the Specialty Assessment during class, complete personalization lab

Classroom Option	>>>	Complete Class	>>>	Pass Specialty Assessment in Class	>>>	Complete Personalization Lab

Here's How to Register Online:

You have been assigned courses in the learning management system (LMS) based on your specialty. Follow this tip sheet to view your curriculum and register online. If you prefer, you can call or email **Epic Training** to register. Calls are answered Monday – Friday, 8 a.m. to 5 p.m. If calling after hours, your call will be returned the next business day. Reach **Epic Training** by calling **214-820-4367** or email **EpicTraining@BSWHealth.org**.

Go to **Learn.BSWHealth.com** and log in with your Baylor Scott & White credentials. On the welcome page, click the **My Transcript** button to view your classroom courses.

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HEALTH

You'll see your training dashboard with My Choice learning options – Test Out, preferred in person session or computer-based training (CBT). If you choose Test Out or self-paced CBT, **Launch** to start. To register for class and/or personalization lab, click **Open Curriculum** next to the course, then click **View Details** next to **Events**.
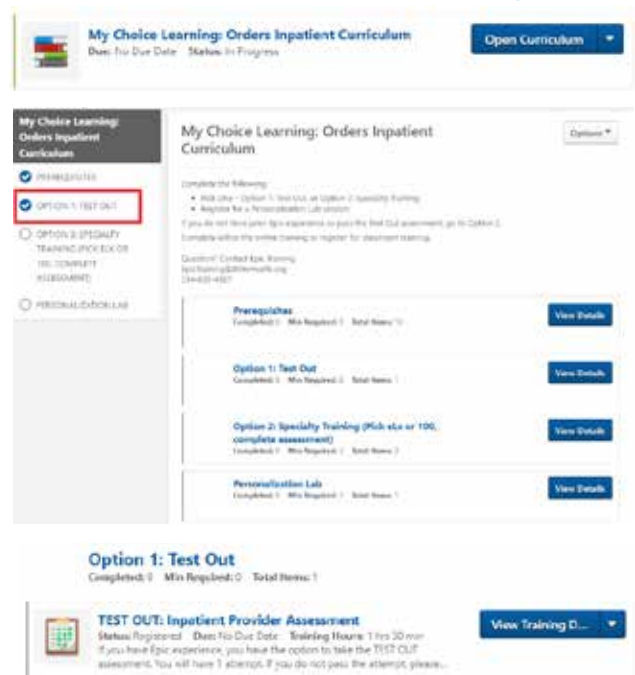
Click **Select Session** next to the event you want to schedule. You can only request one session at a time per event.

A new window will open with a list of dates/times and the number of seats available for your class and lab. Click **Request** to select a session. All sessions have a MCK/P/THH tag.

Registration Confirmation:

You will receive an email to your Baylor Scott & White email address with an attached calendar invite confirming enrollment. To access your BSW O365 email account, log out of any other O365 accounts you may have, go to **http://webmail.bswhealth.org** and log in using your current BSW credentials. If you have questions contact **Epic Training**. Don't respond to the email from **Trainer@BSWHealth.org**.

Get on a Session Waitlist:

If there are no available seats in a session, click **Request** to be placed on the waitlist. Once a seat becomes available, priority goes to those on the waitlist in the order requested. You will receive an email when you are added to the waitlist and another email when you move from the waitlist to the roster. Please note, class size has been reduced to accommodate social distancing.

Withdraw from a Session:

Locate the event from your transcript and click **View Training Details**. From the drop-down arrow, click **Withdraw**.
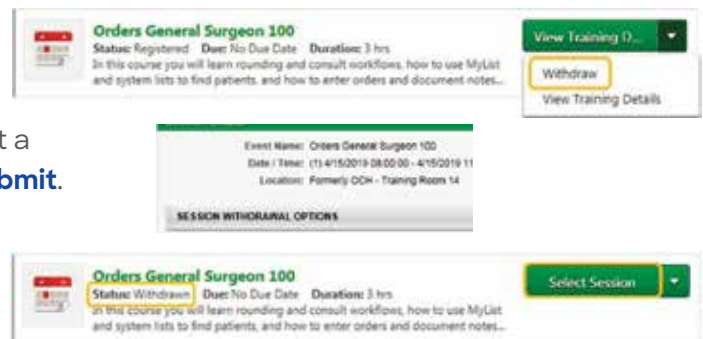
Under **Session Withdraw Options**, select a reason for your withdraw. Then click **Submit**.

The status of your event will change to withdrawn. Click the **Select Session** button to request another session.

View sessions you are registered for and status by clicking **Your Upcoming Sessions** on the **Learn.BSWHealth.com** welcome page.

Questions: Email **EpicTraining@BSWHealth.org** or call **214-820-4367**.
For information: myBaylorEMR.com EHR Resources, **BSWconnect.com Physicians Portal**

Return to Tip Sheet List

Physicians & APPs
Accessing eLearning on PCs

Epic eLearning is in the Learning Management System (LMS).

- Go to **Learn.BSWHealth.com** Click **My Transcript**.

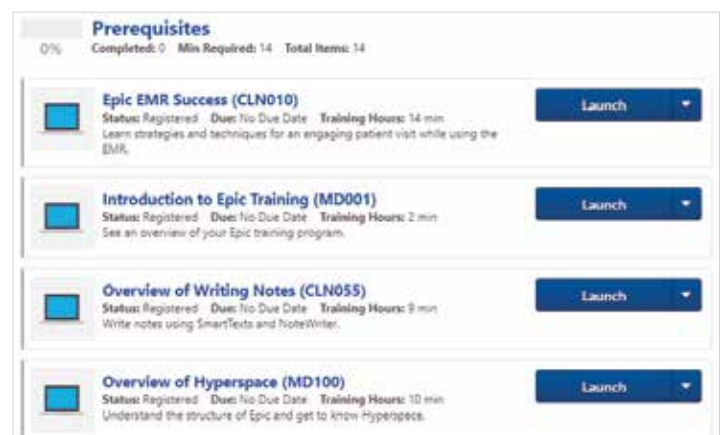- Locate your assigned curriculum and then click **Open Curriculum**.

- eLearnings are part of the **Prerequisites** category. Click **View Details**.
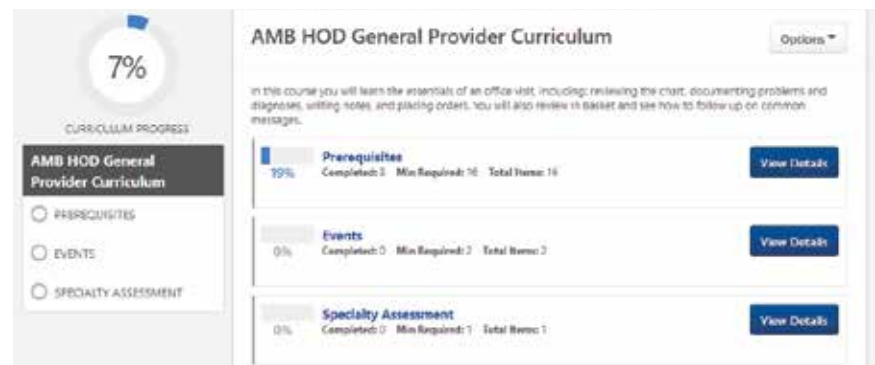
Note: eLearning is recommended before attending classroom education.

- You should now see your assigned eLearnings. To complete an eLearning module, select **Launch**.

Physicians & APPs

Accessing eLearning using Safari for Mac

How to Access eLearnings in Cornerstone using Safari for Mac

- Go to **BSWH.CSOD.com**.

- In the top menu bar hover over **Safari** and click **Preferences**.

- When the pop-up window opens with options select **Websites** from the top menu.
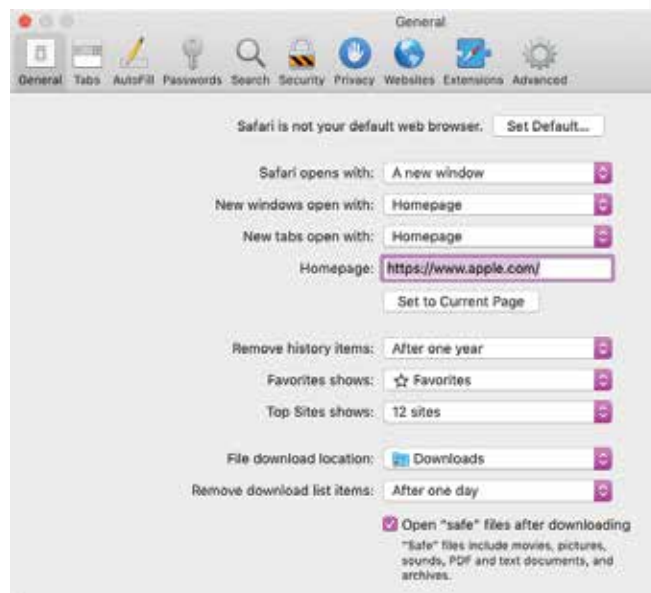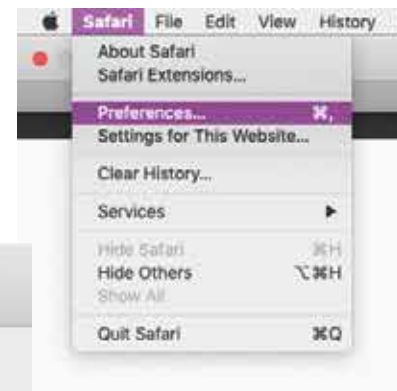
- Select **Auto Play** from the list of options on the left. The website address: **BSWH.CSOD.com** will prepopulate as an option. Select **Allow Auto Play** from the toggle options next to the address.

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H E A L T H
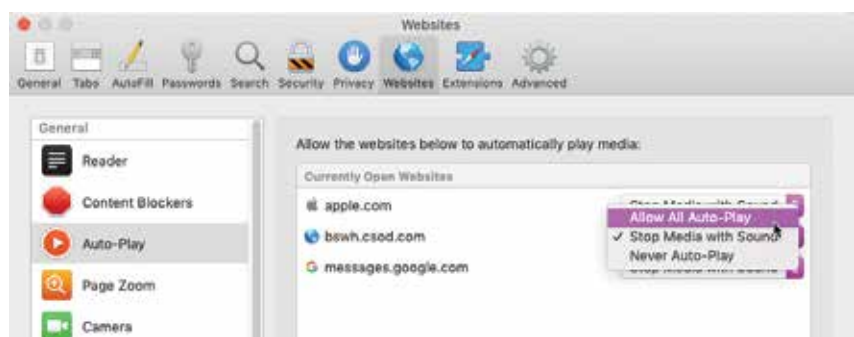
- Select **Microphone** from the list of options. The website address: **BSWH.CSOD.com** will pre-populate as an option. Select **Allow** from the toggle options next to this address.
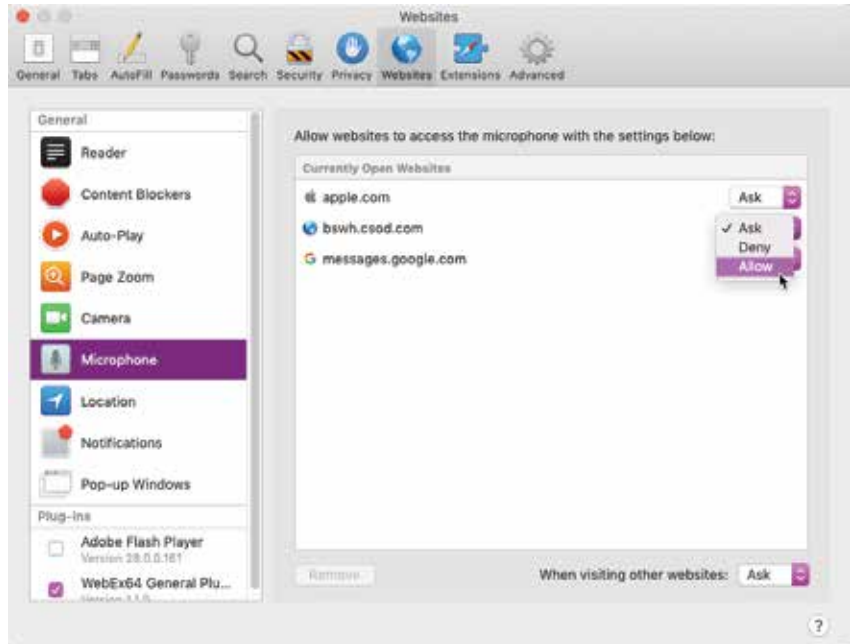
- Select **Pop-Up Windows** from the list of options. The website address: **BSWH.CSOD.com** will pre-populate as an option. Select **Allow** from the toggle options next to this address.
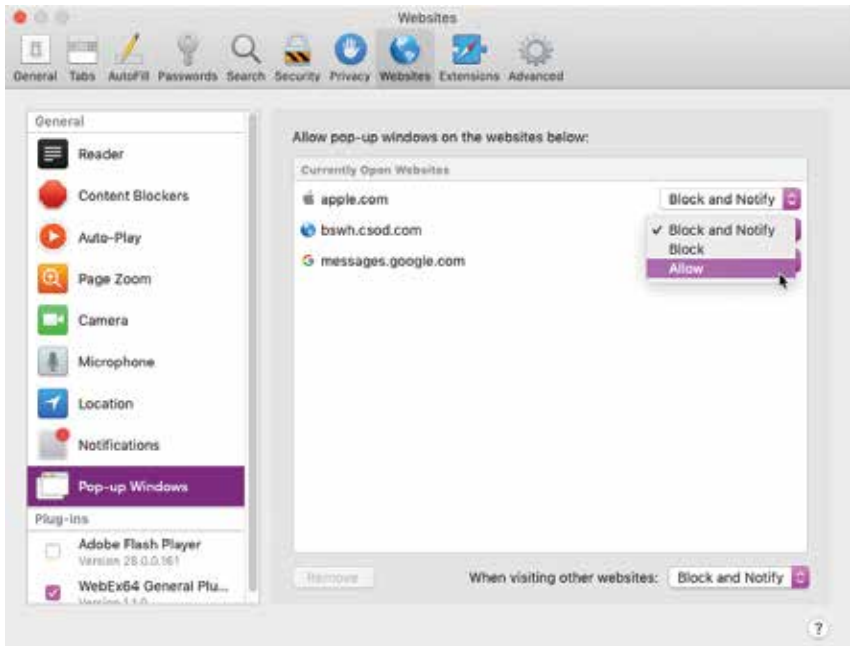
- Close the Preferences pop-up window. Go to **Learn.BSWH.com** and log in with your BSW network ID and password.

ePrescribing of Controlled Substances (EPCS) in EPIC: The Process of Obtaining Security Rights

ePrescribing of Controlled Substances (EPCS) is now legal in Texas and is supported by Epic at BSWH. This will allow you to electronically prescribe Schedule 2 – 5 medications from Epic in combination with a two factor authentication application (SecureAuth) on your mobile phone. In order to obtain the appropriate Epic security rights to perform EPCS you'll first need to complete the process **required by the DEA** which is outlined below.

NOTE: This process is required by the DEA, not BSWH.

Follow this process:

- Non-HTPN medical staff stop by the Medical Staff Office with a valid picture ID issued by a State or Federal agency (e.g. driver's license or passport). (HTPN medical staff use the independent identity verification by a third party vendor, IdenTrust.)

- Download and register the SecureAuth Authenticate application to your smartphone.

How to register your account with SecureAuth (One-time only)

- You will need to perform this step while using a computer inside the BSWH network.

- Click on the following link to update your phone number with SecureAuth: **https://saml.baylorhealth.com/registration**

- Log in using your network ID and password.

- Enter your cell phone number and complete any additional information. This will allow you to authenticate your access to key applications when you are accessing them from outside the BSWH network.

Register your mobile phone

- Open the **App Store** or **Play Store** from your mobile phone.

- Search for **SecureAuth Authenticate**.

- **Install** and **open** the app.

- Select the plus sign in the top left-hand corner to **Add an Account**.

- Choose **Connect with URL**.

- Enter the following URL in the **Web Address** field: https://secureprod.sw.org

- Click **Continue to Login**.

- Enter your **Epic Username (Network ID)** into the Username field and click **Submit**.

- Select the method in which you want your **registration code** sent to you (voice or SMS/Text).

- Enter the **registration code** that you received in the registration code field.

- Next, enter the **password** associated with your Epic login.

Your account will now be on the mobile app home screen.

When you need to ePrescribe, you will click on your account for the passcode to enter into the 2-factor authentication window in Epic.

Physicians & APPs
Medication Reconciliation

In Epic, it is essential for providers to complete medication reconciliation to avoid a delay in patient care during transfers and discharges.

Go to **Learn.BSWHealth.com** for the computer-based online course that will quickly walk you through the steps. You can choose each course individually allowing you to watch those most appropriate for your specialty.

The course covers seven reconciliations:

- Admission
- Transfer
- Discharge
- Post Op Discharge
- Post Op Return to Floor
- Post Procedure Discharge
- Post Procedure Return to Floor

How to access:

- Go to **Learn.BSWHealth.com**.

- Enter your **Username** and **Password** and log in with your BSWH credentials

- Select the blue **My Transcript** box on the left side of your screen

- Find the title **Medication Reconciliation for Inpatient Providers** and select the blue **Launch** button on the right

- Enter your **Username** and **Password** and log in

- Select the reconciliation learning paths in the left-hand menu that are most appropriate for your specialty

Tip sheets for Proceduralist, Surgeons, Non-Surgical follow. All tip sheets can also be found on EpiCenter in the **Medication Reconciliation Folder**.

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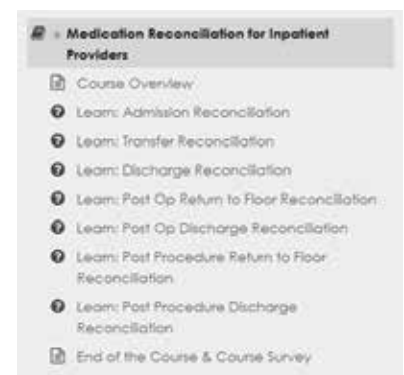
Inpatient Medication Reconciliation Proceduralist

POST-PROCEDURE DISCHARGE
Discharging a patient after procedure

- Open **Discharge Reconciliation** from the **Discharge** section of the **Post-procedure navigator**
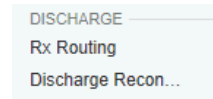
- Reconcile **Problem List** – MUST address this
  - Incomplete hospital problems will be highlighted in yellow
  - ALL problems must be designated as either **Active** or **Resolved** (even those not in yellow highlights)
  - Failure to address all will result in the nurse being unable to discharge the patient, as the **Order Reconciliation** will still be set as incomplete

- Review **Orders for Discharge**
  - Reconcile medications and enter new prescriptions
  - Decisions about **Home Medications** are made in the left column Mark each order **Continue**, **New Prescription**, or **Stop**
  - Decisions about current orders are made in the left column, **Inpatient Medications**. Mark each order **Prescribe** or **Do Not Prescribe**

  Hint: Options at top to **Sort** view, decisions buttons that apply to all and find unreviewed.

- Review **Cont RX/PMP**
  - If your patient has medications that require **PMP Review**, it is done in this step of reconciliation

- **Order Sets**
  - **Discharge patient** order is queued up automatically in the sidebar. Open the order composer and complete details of the order
  - Select appropriate discharge order set in **Favorites** or use search field and select orders as desired
  - Enter additional orders /order sets as needed
  - Click **Sign**

Orders entered through Manage Orders activity after discharge reconciliation has been completed will display as unreconciled making reconciliation incomplete. Nursing will not be able to discharge the patient. Open Discharge Reconciliation from the Discharge section of the Post-procedure navigator and reconcile the new order or orders and sign. Discharge reconciliation is again complete.

The better option for placing an order or orders after discharge reconciliation is complete is to place One-time orders.

POST-PROCEDURE RETURN TO FLOOR

- Open **Order Reconciliation** from the **Return To Floor** section of the **Post-procedure navigator**

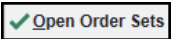- Review **Current Orders** tab
    - Make a decision for each order

    Hint: Quick buttons listed at the top. Remember to continue the **Code Status** orders before selecting **Discontinue Unselected**.

    - Changes will not take effect until orders are released by nurse on receiving unit

- Reconcile **Home Medications** tab
    - Indicate action for each home medication only if changes are necessary since Admission reconciliation was done. Otherwise, skip this step

- **Order Sets** tab
    - If needed, place orders using an order set found in **Favorites** or use search field (with completion matching, search using first three letters of one or two words). E.g. Patient has developed sepsis, place orders using Severe Sepsis Management order set

    Time saving hint: Save favorite order sets for convenience.

    - Click
    - Select orders as desired

    Hint: Use the **Next** button in the sidebar to quickly find orders needing action.

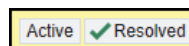   Enter additional orders /order sets as needed

    - Enter a **Transfer Patient** order
    - Select

    - Address any drug interaction warnings

Orders entered through Manage Orders activity after medication reconciliation has been completed and before nursing has released orders will display as unreconciled. Open Order Reconciliation from the Return to Floor section of the Post-procedure navigator and reconcile the new order or orders and sign. Reconciliation is again complete.

Return to Tip Sheet List

Inpatient Medication Reconciliation Surgeon

POST-OP HOSPITAL (Return to Floor)

- Open **Order Reconciliation** through the **Post-op Hospital navigator**

- Review **Current Orders** tab
    - Make a decision for each order

    | Let Expire | Discontinue | Modify | | Continue | Discontinue | Modify |

    Hint: Quick buttons listed at the top. Remember to continue the **Code Status** orders before selecting **Discontinue Unselected**

    | Continue Unselected | Discontinue Unselected | Cancel Transfer | Find Unreviewed |

    - Changes will not take effect until orders are released by nurse on receiving unit

- Reconcile **Home Medications** tab
    - Indicate action for each home medication only if changes are necessary since Admission reconciliation was done. Otherwise, skip this step   `Don't Order (Edit)`

- Review **Cont RX/PMP**
    - If your patient has medications that require **PMP Review**, it is done in this step of reconciliation

- **Order Sets** tab
    - If needed, place orders using an order set found in **Favorites** or use search field (with completion matching, search using first three letters of one or two words). E.g. Patient has developed sepsis, place orders using **Severe Sepsis Management** order set

    Time saving hint: Save favorite order sets for convenience.

    - Click `✓ Open Order Sets`
    - Select orders as desired

    Hint: Use the **Next** button in the sidebar to quickly find orders needing action.   `❗ Next`

    Enter additional orders /order sets as needed

    - Enter a **Transfer Patient** order
    - Select `✓ Sign - Will Be Initiated by Receiving Unit`
    - Address any drug interaction warnings

Orders entered through Manage Orders activity after medication reconciliation has been completed and before nursing has released orders will display as unreconciled. Open Order Reconciliation in the Post-op Hospital navigator and reconcile the new order or orders and sign. Reconciliation is again complete.

POST-OP DAY SURGERY (Discharge)
Discharging a patient immediately after surgery

- Open **Order Reconciliation** from the **Post-procedure navigator**

- Reconcile **Problem List** — MUST address this
  - Incomplete hospital problems will be highlighted in yellow `Active  ✔ Resolved`
  - ALL problems must be designated as either **Active** or **Resolved** (even those not in yellow highlights)
  - Failure to address all will result in the nurse being unable to discharge the patient, as the **Order Reconciliation** will still be set as incomplete

- Review **Orders for Discharge**
  - Reconcile medications and enter new prescriptions
  - Decisions about **Home Medications** are made in the left column. Mark each order **Continue**, **New Prescription**, or **Stop**
  - Decisions about current orders are made in the left column, **Inpatient Medications**. Mark each order **Prescribe** or **Do Not Prescribe**

    Hint: Options at top to **Sort** view, decisions buttons that apply to all and find unreviewed.

- Review **Cont RX/PMP**
  - If your patient has medications that require **PMP Review**, it is done in this step of reconciliation

- **Order Sets**
  - **Discharge patient** order is queued up automatically in the sidebar. Open the order composer and complete details of the order
  - Select appropriate discharge order set in **Favorites** or use search field and select orders as desired
  - Enter additional orders /order sets as needed
  - Click **Sign**

Orders entered through Manage Orders activity after discharge reconciliation has been completed will display as unreconciled making reconciliation incomplete. Nursing will not be able to discharge the patient. Open Order Reconciliation in the Post-op Day Surgery navigator and reconcile the new order or orders and sign. Discharge reconciliation is again complete.

The better option for placing an order or orders after discharge reconciliation is complete is to place One-time orders.
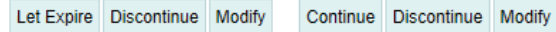
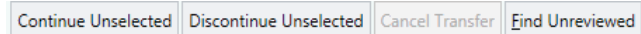# Inpatient Medication Reconciliation Non-Surgical

ADMISSION

- Open **Med Rec-Sign&Hold** in the **Admission navigator**

- Review **Current Orders** tab
  - Make a decision for each order

  | Let Expire | Discontinue | Modify | | Continue | Discontinue | Modify |

  Hint: Quick buttons listed at the top. Remember to continue the **Code Status** orders before selecting **Discontinue Unselected**

  | Continue Unselected | Discontinue Unselected | Cancel Transfer | Find Unreviewed |

  - Changes will not take effect until orders are released by nurse on receiving unit

- Reconcile **Home Medications** tab
  - Indicate action for each home medication

  | Order | Don't Order | Replace | Discontinue |

- **Order Sets** tab
  - Select appropriate order set in **Favorites** or use search field (with completion matching, search using first three letters of one or two words)
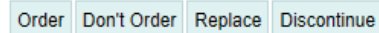
  Time saving hint: Save favorite order sets for convenience.

  - Click ✓ Open Order Sets
  - Select orders as desired
    - Admission order, **Code Status** and **VTE** orders are hard stops
      Hint: Use the **Next** button in the sidebar to quickly find orders needing action. ❶ Next
    - Enter additional orders /order sets as needed
  - Select ✓ Sign - Will Be Initiated by Receiving Unit
  - Address any drug interaction warnings

Orders entered through Manage Orders activity after medication reconciliation has been completed and before nursing has released orders will display as unreconciled. Open Med Rec-Sign&Hold in the Admission navigator and reconcile the new order or orders and sign. Admission reconciliation is again complete

TRANSFER

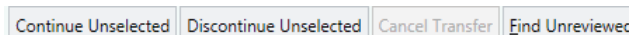### When transferring a patient with a level of care change

- Open **Order Reconciliation** through the **Transfer navigator**

- **Transfer patient** order is queued up automatically in the sidebar. Open the order composer and complete the order details
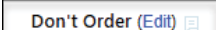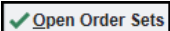
- Review **Current Orders** tab
  - Make a decision for each order   Let Expire | Discontinue | Modify   Continue | Discontinue | Modify

    Hint: Quick buttons listed at the top. Remember to continue the **Code Status** orders before selecting **Discontinue Unselected**

    Continue Unselected | Discontinue Unselected | Cancel Transfer | Find Unreviewed

  - Changes will not take effect until orders are released by nurse on receiving unit

- Reconcile **Home Medications** tab
  - Indicate action for each home medication only if changes are necessary since Admission reconciliation was done. Otherwise, skip this step   Don't Order (Edit)

- **Order Sets** tab
  - If needed, place orders using an order set found in **Favorites** or use search field (with completion matching, search using first three letters of one or two words). E.g. Patient has developed sepsis, place orders using **Severe Sepsis Management** order set

    Time saving hint: Save favorite order sets for convenience.

  - Click   ✔ Open Order Sets
  - Select orders as desired
    Hint: Use the **Next** button in the sidebar to quickly find orders needing action.   ❗ Next
  - Enter additional orders /order sets as needed
  - Select   ✔ Sign - Will Be Initiated by Receiving Unit
  - Address any drug interaction warnings

Orders entered through Manage Orders activity after medication reconciliation has been completed and before nursing has released orders will display as unreconciled. Open Order Reconciliation in the Transfer navigator and reconcile the new order or orders and sign. Transfer reconciliation is again complete.

DISCHARGE

- Select the appropriate **Discharge navigator** depending on whether they are deceased, going home, etc.

- Open **Discharge Reconciliation**

- Reconcile **Problem List** – MUST address this
  - Incomplete hospital problems will be highlighted in yellow   Active | ✔ Resolved
  - ALL problems must be designated as either **Active** or **Resolved** (even those not in yellow highlights)
  - Failure to address all will result in the nurse being unable to discharge the patient, as the **Order Reconciliation** will still be set as incomplete

- Review **Orders for Discharge**
  - Reconcile medications and enter new prescriptions
  - Decisions about **Home Medications** are made in the left column. Mark each order **Continue**, **New Prescription**, or **Stop**
  - Decisions about current orders are made in the left column, **Inpatient Medications**. Mark each order **Prescribe** or **Do Not Prescribe**

    Hint: Options at top to **Sort** view, decisions buttons that apply to all and find unreviewed.

- Review **Cont RX/PMP**
  - If your patient has medications that require **PMP Review**, it is done in this step of reconciliation

- **Order Sets**
  - **Discharge patient** order is queued up automatically in the sidebar. Open the order composer and complete details of the order
  - Select appropriate discharge order set in **Favorites** or use search field and select orders as desired
  - Enter additional orders /order sets as needed
  - Click **Sign**

Orders entered through Manage Orders activity after discharge reconciliation has been completed will display as unreconciled making reconciliation incomplete. Nursing will not be able to discharge the patient. Open Order Reconciliation in the Post-op Day Surgery navigator and reconcile the new order or orders and sign. Discharge reconciliation is again complete.

The better option for placing an order or orders after discharge reconciliation is complete is to place One-time orders.

Hospital Problem List (HPL) Maintenance

Epic Hospital Problem List Smart Link: @HOSPROBL@

- Include this smart link in your note template to incorporate the hospital problem list into your notes
- This problem list will only include diagnoses that have been added during the inpatient stay
- Use of other problem lists available in Epic for inpatient encounters is discouraged as these can potentially include diagnoses that have been added in the outpatient setting which are not currently being addressed during the hospitalization (and thus should not be coded)

Updating the HPL in Epic:

1. On the left, locate the Problem List tab
2. Utilize search box to find a new diagnosis (please select the most specified diagnosis option)
3. For pre-existing conditions, you may search in the Non-Hospital problem list at the bottom and add the diagnosis to the hospital problem list by checking the hospital box
4. Once you have added all hospital problems to the list please specify a principle diagnosis (reason for admission) by selecting the diamond next to the diagnosis
5. Optional: sort your list by priority
6. Update the list daily to add any new diagnoses and update the status
   - Leave active problems active
   - **Delete** diagnoses that have **been ruled out** (Right click diagnosis→delete)
     Note: It is important to not resolve a problem that has been ruled out. This implies that the diagnosis existed but has now resolved
   - Resolve problems that are no longer active and no longer require monitoring or follow-up (Right click diagnosis → resolve)

Epicenter

24/7 Convenient Access to Epic Resources

Epicenter is Baylor Scott & White's Learning Library for Epic resources with tip sheets, eLearning, quick videos and features such as "What's New" and "It's Possible" updates.

- The **BSWconnect Physicians Portal** has the Epicenter link under Quick Links on the home page.

- Epicenter is protected by SecureAuth. Login to **https://bswhealth.ancileuperform.com** with your Baylor Scott & White credentials.

- If you would like to save a direct link to Epicenter use this URL:
  https://bswhealth.ancileuperform.com/#/project/1.25.101

Epicenter has enhanced search and role-specific content. On the home page, featured documents are displayed in the top left. In the upper right of the screen, there is a search bar where you can search for specific keywords or phrases to easily find what you are looking for. Below the search bar is the notification center and favorites. You can click **follow** on any document or folder to receive the latest updates. You can also click the **heart** to the left of documents and folders to pin it to your favorites section for quick access. There are also additional features such as sharing or downloading tip sheets which are located at the bottom of the page.

For questions or support contact the IS Service Center at the new number 214-865-4357 (HELP)

- Previous numbers are auto-forwarding to this new number, including **214-820-4646**
- Service Center online: **ServiceCenter.BSWHealth.com**

Physicians & APPs
Accessing Learning Home Dashboards

Find quick start guides, efficiency tips, videos and other resources in the Learning Home Dashboards in Epic hyperspace. (Also available in Epic Playground.)

To get to your Learning Home:

- Open the **Dashboard** workspace.

- Click the drop down menu.

- Enter the dashboard name you would like to view in the search box and click **Show Catalog**.

- Click the large green arrow that appears when hovering over the icon above the dashboard name.

  - You can also click the star to make this dashboard one of your favorites. This will save time by not having to search for it each time.

  - If you starred your dashboard as a favorite, it will always appear in the **Favorite Dashboards** section.
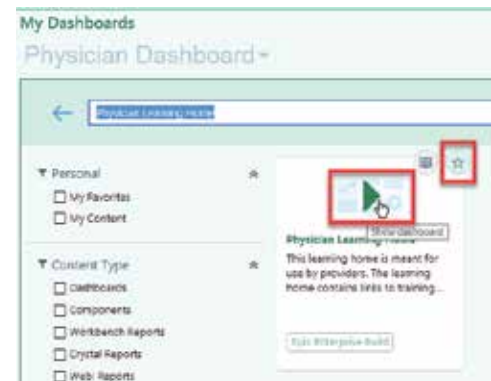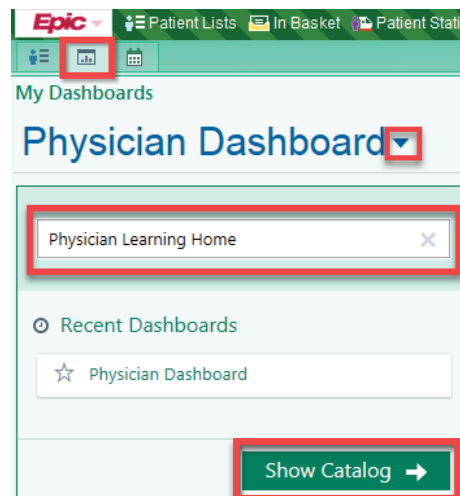
Available Provider Dashboards

| AUDIENCE	LEARNING HOME DASHBOARD NAME
Anesthesia Providers	BSWH Learning Home – Anesthesia
Cupid	BSWH Learning Home – Cupid Cardiology Provider
ED Providers	BSWH Learning Home – ASAP Provider
Inpatient and OB Providers	BSWH Learning Home – Inpatient Provider
Oncology Providers	BSWH Learning Home – ONCBCN Provider
Inpatient and OB Providers	BSWH Learning Home – Inpatient Provider
Radiology Providers	BSWH Learning Home – RIS Radiology

You Can Also...

Personalize your dashboards. Remember to personalize in Hyperspace and not Playground Epic, so the personalization changes will be saved for your future use.

- Click the 3 dots in the upper right corner of the dashboard, and then click **Dashboard Settings**.
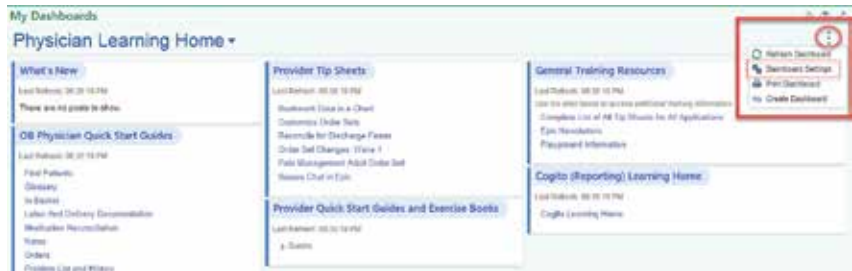
- Rearrange the components by dragging and dropping them in the order you prefer while on the Layout tab.
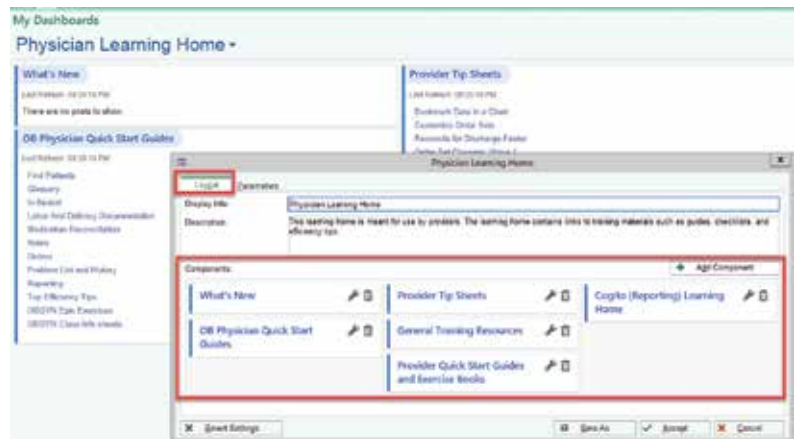
- By clicking the **Add Component** button, you can search for a new component like Disease Management Guidelines. The changes you make within the dashboard settings will only take effect on your dashboard.
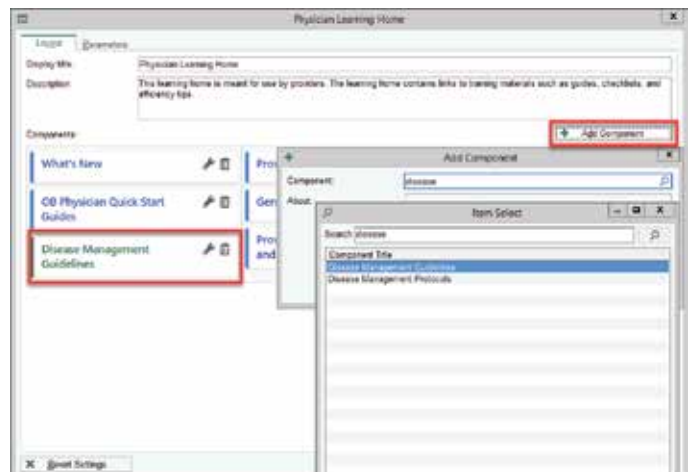
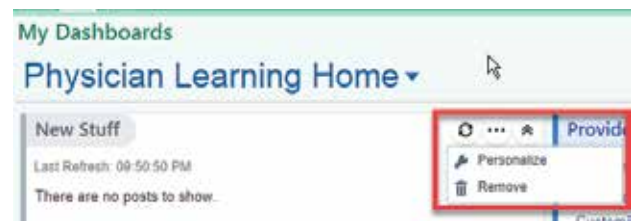

Return to Tip Sheet List

- Click on the wrench to change the color or name of a component. Click the trash can to delete a section. Again, these personalized changes only take effect for you.

- From the main dashboard screen, you have the ability to personalize or refresh each individual section.

  - You can also expand or collapse each section.

- Click on the wrench to change the color or name of a component. Click the trash can to delete a section. Again, these personalized changes only take effect for you.
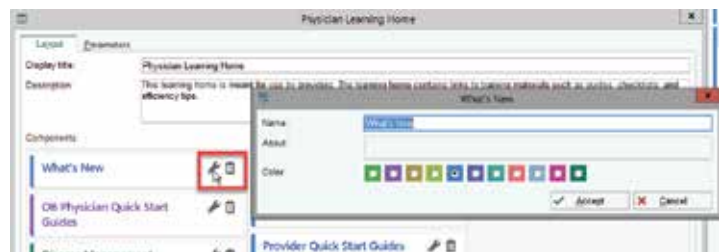
- From the main dashboard screen, you have the ability to personalize or refresh each individual section.

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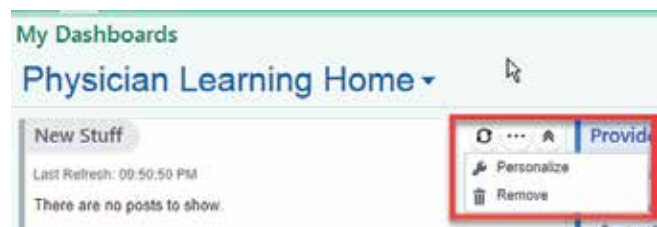
Physicians & APPs
Submitting Case Requests and Orders

Epic Process for BSW – Irving or BSW – Grapevine

Surgery Scheduling Form	Consent Form

Surgery Scheduling Form
- Access on **https://www.bswhealth. med/Pages/departments/surgery/ or-scheduler.aspx**
- Or login to Epic and order a case request

Consent Form
- Login to Epic and access via the top toolbar "Consents" or search "Consents"
- Or Staff access via EpicCare Link (home Page Quick Links "BSWH Consents"). Print from EpicCare Link

Pre-Op H&P
- Login to Epic and create documentation encounter and enter pre-op H&P
- Or print out of office EMR

Pre-Op Orders
- Login to Epic and enter
- Or print Pre-Op Orders from the Downtime website on BSWconnect: **http://bswconnect.com/PrePrintedOrders**
- Or staff access via EpicCare Link (Home Page Quick Links "BSWH Epic Preprinted Order Sets")

Submitting Forms, Pre-Op H&P and Pre-Op Orders

BSW – Grapevine: Surgery scheduling form, Consent form, Pre-Op H&P and Pre-Op Orders fax to **817-329-2877**
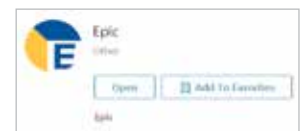
BSW – Irving: Surgery scheduling form, Consent form, Pre-Op H&P and Pre-Op Orders fax to **972-579-8335**

Outpatient Orders
- An order must be present **PRIOR** to scheduling the patient. When faxing orders or entering orders directly into Epic, the order must be received prior to scheduling the appointment. This change impacts all outpatient, scheduled visits requiring an order including, but not limited to:
  - Outpatient Radiology (Such as US, DX, CT, MR, and NM)
  - Women's Imaging (Such as DX Mammograms)
  - Infusions

Access Epic Remotely
- When not on the BSW network, access Epic on the Citrix Portal by going to **myapps.BSWHealth.com** and log in with your network ID and password
- Click **All Apps**
- To add Epic and other applications you use on a consistent basis, click **Details**, then **Add to Favorites**. This will create a favorite list of apps that will show up on your Citrix homepage
- One new number for the IS Service Center: **214-865-HELP (4357)**. Previous numbers are auto-forwarding to this new number

Baylor Scott & White HEALTH

Physicians & APPs
Submitting Case Requests and Orders

Epic Process for BSW – Plano, BSW – McKinney, BSW The Heart Hospitals – Denton, McKinney and Plano

Surgery Scheduling Form	Consent Form
• Access on **https://www.bswhealth.med/Pages/departments/surgery/or-scheduler.aspx** • Or login to Epic and order a case request	• Login to Epic and access via the top toolbar "Consents" or search "Consents" • Or Staff access via EpicCare Link (home Page Quick Links "BSWH Consents"). Print from EpicCare Link

Pre-Op H&P	Pre-Op Orders
• Login to Epic and create documentation encounter and enter pre-op H&P • Or print out of office EMR	• Login to Epic and enter • Or print Pre-Op Orders from the Downtime website on BSWconnect: **http://bswconnect.com/PrePrintedOrders** • Or staff access via EpicCare Link (Home Page Quick Links "BSWH Epic Preprinted Order Sets")

Submitting Forms, Pre-Op H&P and Pre-Op Orders

BSW – Plano: Surgery scheduling form, Consent form, Pre-Op H&P and Pre-Op Orders fax to **469-814-2349**

BSW – McKinney: Surgery scheduling form, Consent form, Pre-Op H&P and Pre-Op Orders fax to **469-764-5109**; Gastroenterology Procedures fax to **888-820-1728**

THH – Denton: Surgery scheduling form, Consent form, Pre-Op H&P and Pre-Op Orders fax to **214-818-2748**

THH – McKinney: Surgery scheduling form, Consent form, Pre-Op H&P and Pre-Op Orders fax to **469-764-3440**

THH – Plano: Surgery scheduling form, Consent form, Pre-Op H&P and Pre-Op Orders fax to **214-818-6471**

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Outpatient Orders

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