MEETING AGENDA/MINUTES

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| TOPIC: | Joy in Using Epic Workshop |
| DATE: | February 3rd, 2023 |
| TIME: | 7:00am-9:00am |
| LOCATION:  | UPMC East – Training Classroom |

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| Agenda Topic | Time Allotted | Presenter |
| 1. Introductions and workshop agenda overview
 | 10 minutes | Dr. Fischer |
| 1. Efficiency in Ordering
	1. Saving Defaults for Orders (Preference List) – demo and build
		1. Eg. Radiology tests – default in the reason.
		2. Consult orders – default specific referral information
		3. Physical Therapy orders
		4. Future orders
		5. Clinic Collect – take Fischer preference list if you use clinic collect.
	2. Order Panels – demo and build
	3. Customize Smart Sets
		1. Demo:
			1. Customize Smartset from Plan Section
			2. Select User-Version from Plan and from BPA
		2. Hands On:
			1. Select a BPA you Encounter Often and Customize its Smartset
 | 20 minutes | Dr. Fischer |
| 1. How to Win at Inbasket
	1. Demo:
		1. Build My List for Phone Encounters
		2. See how to Build List for other purposes while building phone encounters list
		3. How to use buttons to route
			1. In phone encounter, click Add my List
			2. In phone encounter, click the arrow next to Add my List to add routing from a different list (short cut to send to a different person).
	2. Hands On:
		1. Build list for Phone Encounters
		2. Build List for Results and Charts
	3. Quick Actions:
		1. Staff Message
		2. Patient Messages (normal results)
		3. Result Notes
			1. Forward to PCP
			2. Just default staff and DONE
		4. Letters
			1. Normal Results
	4. Quick Notes for MyUPMC messages and Telephone Encounters
	5. Postponing inbasket messages until you need them.
 |  20 minutes | Dr. Fischer |
|  4. Enter Visit Diagnoses [3]* 1. Demo:
		1. From Problem List
		2. In Diagnosis Section (quick buttons)
		3. While ordering in association grid
	2. Hands On:
		1. Make Common Diagnosis Quick Buttons
		2. See Problem List Quick Buttons
		3. Add to Common Diagnosis Preference List
 | 15 minutes | Dr. Fischer |
|  5. Navigator * 1. Demo:
		1. Reorder Activity Tabs
		2. Change the Plan section layout
	2. Hands On:
		1. Repeat in your own workspace
 | 15 minutes | Dr. Fischer |
|  6. Documentation* 1. Templates [6]
		1. Demo:
			1. Create buttons for SmartText and SmartPhrase
		2. Hands On:
			1. Make documentation template quick buttons
	2. Procedure Documentation
		1. Notewriter Macros (take mine)
		2. Notewriter in Notes
			1. @physexam@
			2. @hpi@
			3. @ROSBH@
			4. Save macros if appropriate
 | 20 minutes |  |
|  7. Questions from the workshop attendees | 20 minutes | Dr. Fischer |