# Physician Build – Advanced

CLN160

##### **Training Room**: In-person at Epic’s Voyager Hall

##### **Dates**: August 31-September 2, 2021

##### **Trainers**: John Nelson

### Prerequisites

Live use of EpicCare Ambulatory or some Fundamentals course (e.g. CLN102, AMB100) and attendance of the CLN150 Physician Build - Basic course

### Purpose of Training:

The purpose of this training is to provide physician builders with the following information:

* Where and how can Documentation Flowsheets be used to capture important clinical data during patient visits? How are these flowsheets built?
* How are navigators constructed? How can a Physician Builder optimize the navigator for a group?
* What logic is used to assign a navigator? How does the Workflow Engine rule assign navigators and control Epic menus?
* What is the EpicCare profile and what are the top things Physician Builders want to set there?
* What are reports and print groups and how can a Physician Builder use them to create specialty-specific views that consolidate critical patient information on one screen? How can you add custom links to improve workflows?
* What are columns and how can a Physician Builder use columns to creatively display information on their Schedules and Patient Lists?
* What are some of the advanced SmartForm functions? How can Physician Builders create custom procedure SmartForms?

### Learning Objectives:

As a result of this training, learners will be able to:

* Describe how navigators are constructed and how to optimize the navigator for a group.
* Explain the logic used to assign a navigator and how the Workflow Engine rule assigns navigators and controls Epic menus.
* Describe the EpicCare profile and list the top features used.
* Demonstrate the use of report and print groups and use them to create specialty-specific views that consolidate critical patient information on one screen, and how to add custom links to improve workflows.
* Describe some of the advanced SmartForm functions and how to create custom procedure SmartForms
* Explain where and how Documentation Flowsheets be used to capture important clinical data during patient visits and how these flowsheets are built.

**Notes:**

* All Epic training sessions use a current release of the application. If your organization is using an older version of the software, you will likely encounter some discrepancies between the features and functionality you learn at Epic and what is actually available in your system.
* The following agenda will incorporate two 15-minute breaks each day in addition to the scheduled lunch hour.

## Day 1

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| 8:30 | **Welcome and Introduction** |
| 8:50 | **Building Flowsheets**   * Rows, Groups, and Templates * Custom Calculations * Cascading |
| 11:30 | **Navigator Build - Basic**   * Navigator Structure and Terminology * Build a Navigator Topic Using Standard Navigator Sections |
| 12:00 | **Lunch** |
| 1:00 | **Navigating the Text Side**   * Navigation Tips * Keyboard Commands * Duplicating Records |
| 2:00 | **Navigator Build – Advanced**   * Flowsheets in a Navigator * Navigator Configuration Records * Embedding Reports in a Navigator * Embedding SmartForms in a Navigator * Dynamic Navigator Sections |
| 3:45 | **Workflow Engine Rules**   * Terminology and Structure |
| 4:45 | **Questions and Wrap-Up** |
| 5:00 | *Hotel shuttles depart Epic* |

## Day 2

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| 8:30 | Welcome and questions from the previous day |
| 8:45 | **Introduction to Profile**   * Terminology and Structure * Examine the Top Items Controlled by a Profile Record * Profile Hierarchy, Linking, and Troubleshooting |
| 10:30 | **Reports and Print Groups – Basics**   * Structure * Explore the Print Group Encyclopedia * Modify a report |
| 11:30 | **Report and Print Groups – Advanced**   * Create Custom Result Print Group |
| 12:00 | **Lunch** |
| 1:00 | **Reports and Print Groups - Advanced**   * Print Groups Associated with SmartTools * Dynamic Print Groups and Activity Links |
| 2:30 | **Introduction to Column Build**   * Terminology and Structure * Create a Custom Column |
| 3:30 | **Synopsis and Review Flowsheets**   * Synopsis Flowsheet Parts * Synopsis-Type Print Groups * Synopsis-Type Reports |
| 5:00 | *Hotel shuttles depart Epic* |

## Day 3

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| 8:30 | Welcome and questions from the previous day |
| 8:45 | **Synopsis and Review Flowsheets, continued**   * Standalone Review Flowsheets * Flowsheet Data in SmartLinks and Reports |
| 9:45 | **Procedure SmartForms**   * Using Procedure SmartForms * Editing Procedure SmartForms * Editing a Procedure * Triggering Charges with SmartForm Documentation * Scripting a SmartForm |
| 11:45 | **Evaluations\*/Adjourn/Lunch**  *\*Available for up to two weeks after class at:* [*https://training.epic.com/Evaluations*](https://training.epic.com/Evaluations) |
| 1:00 | **OPTIONAL Study Hall – Trainer Available**   * No Presentation * Work on Certification Projects * Questions with a Trainer * Leave When You Want |
| 4:00 | *Adjourn* |