# Physician Builder for CI Fellows

 CLN171

**Dates**: August 12-13, 2021
**Trainers**: Tyler Powers, Mark Henkelmann, Nikki Vullings, Gabie Campbell, Haley Adams

### Prerequisites

* **CLN171v**: Physician Build - Basic (CLN150)

### Learning objectives:

By participating in this training, learners will be able to:

* Identify the terminology and possibilities of creating reports in Epic.
* Describe the different reporting options in Epic including Reporting Workbench and Clarity.
* Identify ways to configure reporting workbench reports and some of the build the reports depend upon such as columns and groupers.
* Explain how to determine which patients are included in the registry as well as what patient data should be stored in the registry tables.
* Discuss Dashboard setup.
* Describe other Epic reporting tools such as an overview of Slicer/Dicer, Clarity and Ad-hoc Chronicles reporting.

## Thursday, August 12 – CLN171v, Day 1

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| --- | --- |
| 8:30 | **Welcome and Introduction** |
| 8:35 | **Overview of Analytics in Epic** * Epic Reporting Architecture and Terminology
* Dashboard Review
 |
| 9:45 | **Reporting Workbench – Patient Reports*** Reporting Workbench Templates
* Find Patients
* Columns
* Report Summaries
 |
| 12:00 | **Lunch Break** |
| 1:00 | **Reporting Workbench – Find Orders*** Modifying Report Appearance
* Advanced Columns Using CER Rules
 |
| 2:15 | **Report Template Creation*** Modifying the Find Orders Template
* Adding Items to the Search
* Search Logic
* Parameters
* Creating a Custom Template
 |
| 3:30 | **Registry Build: Basics & Population Inclusion*** Create a New Registry
* Inclusion Rules
 |
| 5:00 | *Adjourn* |

## Friday, August 13 – CLN171v, Day 2

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| 8:30 | Welcome and questions from the previous day |
| 8:35 | **Registry Build: Metrics*** Metrics
* Reports
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| 10:00 | **Contact-Based Registries**  |
| 10:30 | **Grouper Build*** Diagnosis Groupers
* Medication Groupers
* Procedure Groupers
 |
| 11:30 | **Dashboard Build: Basics*** Dashboards
* Components
 |
| 12:00 | **Lunch Break** |
| 1:00 | **Dashboard Build: Basics, cont’d.*** Displaying Summary Views
 |
| 1:30 | **Dashboard Distribution*** User Roles & Types
* Redirectors
* Links
 |
| 1:45 | **Dashboard Build: Advanced*** Additional Component Types
* Metric Data and Thresholds
 |
| 3:00 | **Clarity Overview*** Epic-Crystal Reports
* Overview of SQL
* Overview of Crystal
 |
| 3:45 | **SlicerDicer Overview*** Data Models
* Populations
* Slices
* Measures
 |
| 5:00 | *Adjourn* |