# 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 |
| 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* |