# EpicCare Physician Build – Orders

 CLN172

##### Training Room: TBD

##### Dates: January 17-19, 2018

##### Trainer: John Nelson, Katherine Guenoun

### Prerequisites

Attendance of the CLN150 Physician Build - Basic and CLN160 Physician Build - Advanced courses.

### Purpose of Training:

The purpose of this training is to help physician builders understand the terminology and possibilities of configuring orders in Epic. In the Physician Build - Basic class (CLN150), physician builders worked with tools that made ordering easier for physicians. These tools included Preference Lists, Order Groups, Order Sets and SmartSets. However, these tools don’t allow you to optimize everything about orders – to do further optimization, you need to get into the build of the orders-related master files. This course will begin by giving physician builders an understanding of the life of an order from the beginning to when it is resulted. We will next explore setting up defaults, buttons, display items, and questions for procedures. We will also get into configuring charge capture. After focusing on procedures, we will turn our attention to configuring medication records and looking at medication-specific setup such as order contexts and mixture records. The course will conclude by looking at configuration that determines who gets notified of results and how those results appear in the In Basket.

**Note:** All Epic training sessions use a current release of the application. If your facility is using an older version of the software, you may encounter some discrepancies between the features and functionality you learn here and what is actually available at your facility.

**Note**: The following agenda incorporates two 15-minute breaks each full day in addition to the scheduled lunch hour.

## Day 1

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| --- | --- |
| 8:30 | **Welcome and Introductions** |
| 8:45 | **Tracing the Life of an Order** * Pending, Sign and Hold, Sign, Phases of Care
* Parent and Child Orders
* Order Transmittal
* Procedures vs. Medications
* Results
 |
| 11:30 | **Procedure Orders Configuration** * Explore Procedure and Procedure Category
* Build Category Records
* Build Procedure Records
* Buttons, Defaults, Allowed Items
 |
| 12:00 | **Lunch** |
| 1:00 | **Procedure Orders – Continued** |
| 2:45 | **Order Composer Configuration** * Setting Display Items and Summary Sentence
* Contexts
 |
| 3:45 | **Order-Specific Questions** * Simple Questions
* Cascading Questions
* Advanced Question Configuration
 |
| 4:45 | **Questions and Wrap-Up** |
| 5:00 | **Shuttles Leave for Hotels** |

## Day 2

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| 8:30 | **Welcome and Questions from the Previous Day** |
| 8:45 | **Medication-Related Build Concepts*** Compare Procedure and Medication Build Options
* Simple Medication Configuration
* Contextual Overrides
* Overview of Mixture Build
* Configuring Alert Thresholds
 |
| 12:00 | **Lunch** |
| 1:00 | **Charging and Charge Capture** * Orderable, Performable, Chargeable
* Charge Capture Preference Lists and Settings
 |
| 3:15 | **Overview of Order Transmittal** * Order Transmittal Rule Structure
* Multi-step Order Transmittal
 |
| 4:45 | **Questions and Wrap-Up** |
| 5:00 | **Shuttles Leave for Hotels** |

## Day 3

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| 8:30 | **Welcome and Questions from the Previous Day** |
| 8:45 | **Lab Components** * Base Names
* Common Names
* Results Review
 |
| 9:30 | **Results Routing Overview** * Schemes and Setup
* Hierarchy
* Testing
 |
| 12:00 | **Evaluations\*/Adjourn/Lunch**\*Available for up to two weeks after class at: <https://training.epic.com/Evaluations> |
| 1:00 | **OPTIONAL Study Hall – Instructor Available*** No presentation
* Work on certification projects
* Questions with an instructor
* Leave when you want
 |
| 4:00 | **Adjourn**  |