Epic Outpatient Provider Onboarding Training
Internist-Family Medicine
Live Webcast

If you are from an organization that is eligible to receive continuing education credit:

- *Create a UW Madison ICEP Account. Make sure you enter your mobile number into your ICEP account profile.*
- *Your trainer will provide you with a code to verify your attendance.*
- *Two ways to submit the code. See your pre-course email for details.*
  - *Text the code to 608-260-7097 **OR***
  - *Enter the code in the UW-Madison ICEP portal.*
- *Claim credit within **45 days.***

AGENDA

Time/Minutes	Topics
15 minutes	Welcome *** *No credit is provided for the Welcome.*
7 minutes	Trainer Demo-Standard Office Visit • Complete the visit
57 minutes	Standard Office Visit • Get up to speed on the patient • Update problems and diagnoses • Write a note • Place orders • Wrap up the visit • Questions
10 minutes	Break

30 minutes	In Basket
	• Overview
	• Messages
	   ○ Results
	   ○ Rx Request
	   ○ Pt Advice Request
	   ○ Pt Call
	   ○ My Open charts
	• Find completed and sent messages
	• Questions

20 minutes	Procedure Visit • Begin the procedure visit • Document a procedure • Questions
10 minutes	Break
14 minutes	Quick Office Visit • Get up to speed on the patient and complete routine documentation • Questions
14 minutes	Video Visit • Locate video visits on your schedule

	Open a video visit to prepare or document the visit
	• Connect to the video
	• Wrap up the video visit
	• Questions
2 minutes	Resources to Reference

The University of Wisconsin provides equal opportunities in employment and programming, including Title IX requirements. The University of Wisconsin fully complies with the legal requirements of the ADA and the rules and regulations thereof. If any participant in this educational activity needs accommodations, please contact info@icep.wisc.edu.

SUMMARY BRIEF

Provided by the **University of Wisconsin–Madison Interprofessional Continuing Education Partnership (ICEP)** and **Epic**.

Statement of Need and Purpose

Using a new electronic health record (EHR) changes the way you document and complete tasks necessary for patient care. Learning how to use the system is essential to support efficiency, best practices, and most importantly, patient safety.

In this training, you will learn how to perform the essentials of an outpatient office visit, including reviewing the chart, documenting problems and diagnoses, writing notes, and placing orders in Epic. You will also learn how to document a procedure in an outpatient setting and see how to follow up on common messages in In Basket, Epic's task management system. This training will include scenarios that are relevant to this specialty.

Elements of Competence

This educational activity is designed to change learner competence in the following areas:

- The American Board of Medical Specialties: Systems-based practice
- National Academy of Medicine/Nursing: Utilize informatics
- Interprofessional Education Collaborative Competencies: Roles/responsibilities and interprofessional communication

Intended Audience

This program is designed to meet the needs of physicians, advance practice providers, as well as others who are using Epic in their daily outpatient practice.

Learning Objectives

Following this training, learners as members of an interprofessional team will be able to:

1. Navigate within the electronic health record to locate relevant historical information for patient visits.
2. Thoroughly document patient concerns, observations, problems and diagnoses, treatment plan, treatment, and patient response to create an accurate and comprehensive record of patient care.
3. Order patient tests, medications, and address additional needs with appropriate details to support the treatment plan.
4. Communicate asynchronously in Epic's task management system with members of the healthcare team for timely, effective, and safe patient care.
5. Contextualize tools and workflows to your specialty area of practice.

Accreditation Statement

Credit Designation Statements

American Medical Association (AMA)

American Nurses Credentialing Center (ANCC)
The University of Wisconsin–Madison ICEP designates this virtual live activity for a maximum of **2.5** ANCC contact hours.

AAPA Credit Designation Statement
The University of Wisconsin–Madison ICEP has been authorized by the American Academy of PAs (AAPA) to award AAPA Category 1 CME credit for activities planned in accordance with AAPA CME Criteria. This virtual live activity is designated for **2.5** AAPA Category 1 CME credits. PAs should only claim credit commensurate with the extent of their participation.

Continuing Education Units (CEUs)
The University of Wisconsin–Madison ICEP, as a member of the University Professional & Continuing Education Association (UPCEA), authorizes this virtual live program for **.25 CEUs or 2.5 hours**.

Not a physician or advanced practice provider?
This course was approved for AMA PRA Category 1 Credit(s)™ and ANCC credits. When you attest to attending this course within ICEP's learning portal, your credit certificate will indicate that you've earned UW-Madison CEUs and that the course was approved for AMA PRA Category 1 Credit(s)™. You can submit this documentation to your licensing body for possible application to your CE requirements.

Policy on Disclosure
It is the policy of the University of Wisconsin–Madison Interprofessional Continuing Education Partnership (ICEP) to identify, mitigate and disclose all relevant financial relationships with ineligible companies* held by the speakers/presenters, authors, planners, and other persons who may influence content of this accredited continuing education (CE). In addition, speakers, presenters and authors must disclose any planned discussion of unlabeled/unapproved uses of drugs or devices during their presentation.

This accredited continuing education activity is focused on a non-clinical topic—use of and communication within the electronic health record. As such, no persons in a position to control content have relevant financial relationships with ineligible companies to disclose.

*Ineligible companies are those whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by, or on, patients. The ACCME does not consider providers of clinical services directly to patients to be ineligible companies.

Planning Committee Members		
*Caitlin Shirk, Epic Training Team	Erin Ippen, RD (as of 7/10/2023)	Lia Mcneely, NP
Lynn Cole, NP	Lilia Fuentes, DDS (as of 7/10/2023)	Ryan Mooney, PA
Cassidy Cotter, Epic	Mark Henkelmann, Epic Training Team	Kim Schommer, PA
Stephen Davis, DDS (as of 7/10/2023)	John Kodosky, PA	Jenna Timm, Epic Training Team
Jeffrey Del Vecchio, PA	Dave Little, MD	

*Activity Chair