

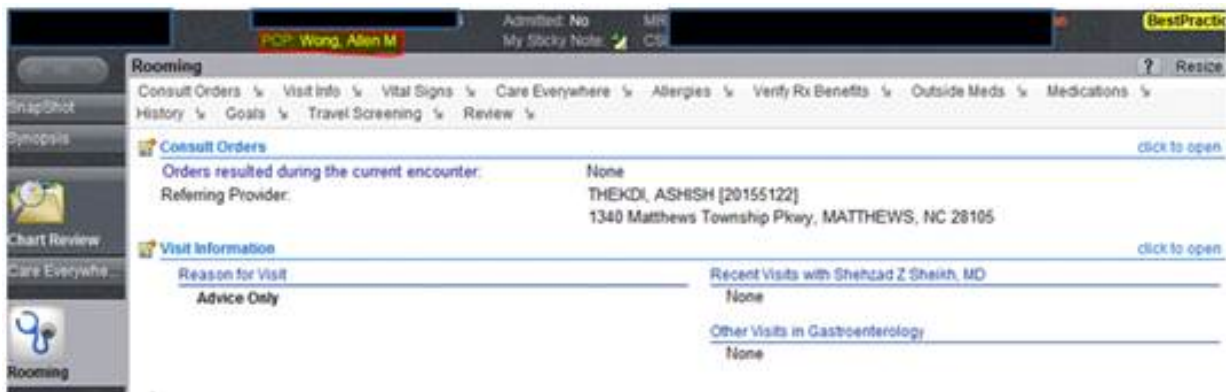
## SENDING EPIC CLINIC NOTES TO REFERRING PHYSICIANS

The “send at close encounter” box within the communications activity is already pre-checked.



This means that after we complete and sign a clinic encounter our clinic note (along with a cover letter) will be automatically sent to the patient’s referring physician and PCP. This simplifies our work and better ensures that our notes reach our patients’ physicians. Still, there are a few important caveats – be sure to at least read #1:

1. Most importantly, **the correct referring physician & PCP must be listed:**
  - Verify the correct PCP is listed at the top of the physician workspace. If needed, add or change a PCP by clicking on the PCP’s name (highlighted and circled in the screenshot below). This will open the Care Team box within which we can remove anyone who is listed in error and enter the correct PCP and other care team members.



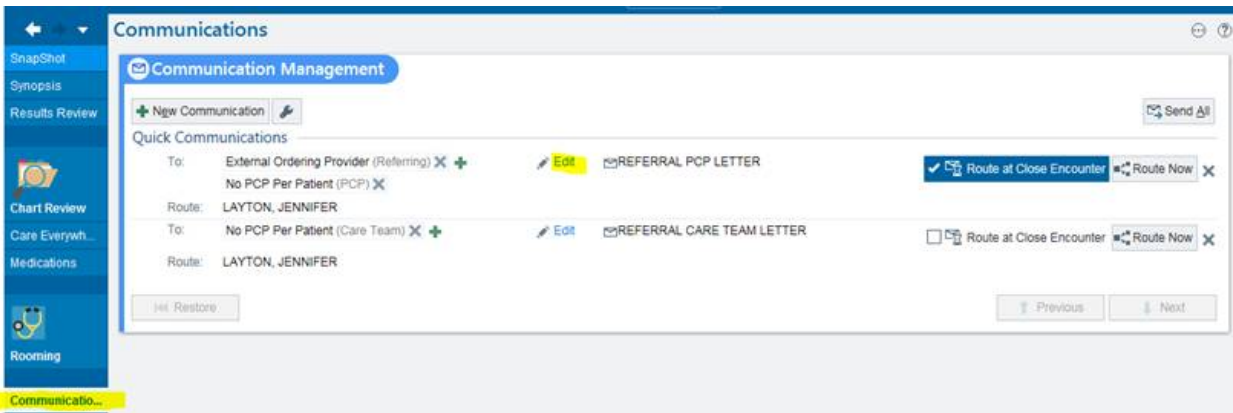
- Verify the correct referring physician is listed by going to the rooming tab and then looking under “consult orders”. If the referring physician is wrong or missing, click on the “consult orders” hyperlink. A new box will open - type in the referring physician’s name and click enter, select the correct physician (if given multiple choices) and finally close the window. *If you cannot change the referring doc name then see bullet immediately below.*

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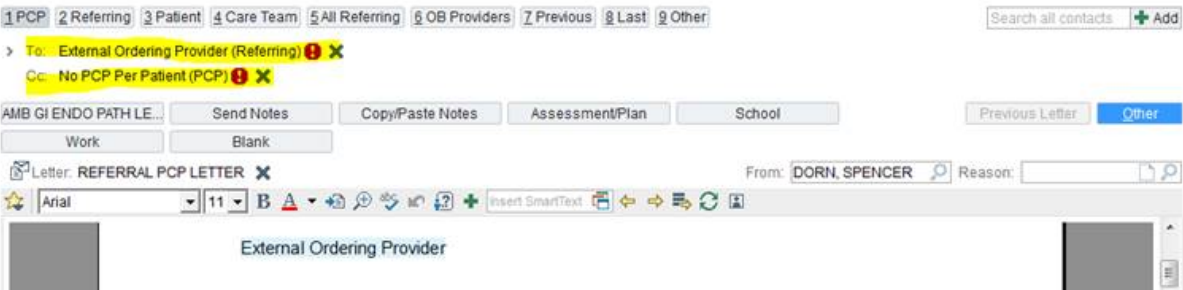


If you are unable to change the referring/PCP name in the rooming activity or if you just prefer a changing it directly then after you complete and accept your note:

- i. Click the communication activity



- ii. Edit the recipient list.



- iii. Click either route now or route upon closing encounter. (note, unlike GI procedure path letters these do not need to be routed to Jenn).

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If you have questions, please do not hesitate to contact me.

Sincerely,

[+ Attach File](#)

Attachments: No attachments

Routing Options

Wait for results  Wait for transcriptions

Route draft to: LAYTON, JENNIFER [77788];  Keep as default

Instructions >  Clean up letter  Recipient information incomplete

[+ New Communication](#) [Preview](#) [Pend](#) [Route Now](#) [Route upon Closing Encounter](#) [Cancel](#)

2. Otherwise, **at times we may want to bypass the automated process and open the communication activity** (by clicking on “communications” on the left-sided column) in order to:
  - a. Add a new letter/note recipient. Do this by clicking the “new communication” button (highlighted below).
  - b. Edit the cover letter that is being mailed, perhaps personalizing it or more explicitly stating in the cover letter the key points of your visit. Do this by clicking the blue “send notes” hyperlink (circled in red below).
  - c. Change how the letter and note are being sent (in basket, fax, mail). Do this by clicking the blue “send notes” hyperlink (circled in red below) and then adjust the routing method. For instance, EPIC will automatically route these letters/notes via In Basket to any referrals/PCPs with EPIC accounts. This is usually – but not always – correct as some physicians (e.g., those at Digestive Healthcare in Raleigh) have EPIC access because they occasionally see patients at a UNC HCS Hospital (e.g., Rex), but because they do not use EPIC in their offices they may prefer to receive our letters and notes via Fax to their office.

Communications

Communication Management

[+ New Communication](#) [Send All](#)

Quick Communications

To: Steven Helman (Referring) \* [+ Send Notes](#)  [Send at Close Encounter](#) [Send Now](#) [X](#)

031 Restore [Previous F7](#) [Next F8](#)

3. The prechecked “send at close encounter” box should help ensure that fellows’ and PA/NPs’ notes are appropriately routed. However, how an attending attests and signs the note affects whether there is one single note or two separate notes (one solely the attending’s attestation).