



DIRECTIONS FOR STUDY MONITORS

1. Please email **Sheila Popovich** with Study Monitor Requests at the initial site visit.
2. An **Epic Username and password** will be assigned to your Study Monitor and will be sent to the Study Coordinator from Sheila Popovich.
3. Please make sure the Study Monitor has a **list of research participants** that will be need to be viewed.
4. Please have the **Study Monitor** use the attached **Training Document for a step-by-step approach to Epic**.
5. If you have any **Epic questions**, please call Ari Anderson at 68373, Karen Roeckner at 64538, or Sheila Popovich at 66158.
6. If a Study Monitor does not remember their username and password, the **Help Desk** can also assist at extension **62160**. *(Keep in mind that a Study Monitor does not have a Loyola UVID, however, the Help Desk can locate them in Epic by the Study Monitor providing their First and Last Name. Study Monitors are assigned a Login ID that begins with the letter "N".)*
7. All Study Monitors will be audited to verify chart access of research participants. Please email **Sheila Popovich** to request an access report after the completion of each visit.
8. Once the study monitor has completed their research, please contact **Sheila Popovich** to inactivate the account.

Chart Review for Study Monitors

OBJECTIVES

- ❖ Login and Logout of Epic Hyperspace
- ❖ Using Chart Review
 - Selecting a Patient
 - Reviewing Labs, Meds, Notes
 - Filtering
- ❖ Using Snapshot
- ❖ Creating a Patient List
- ❖ Locating Data in Epic
 - Using the Web Link

Accessing Epic Hyperspace

Logging into Hyperspace

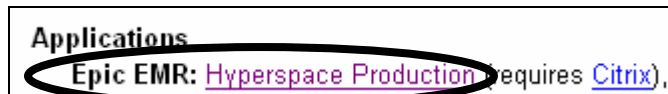
You will need to have an **EPIC User ID** and **password** to enter Hyperspace. As a Study Monitor you have limited **VIEW ONLY ACCESS**.

Go to the Loyola Intranet – <http://portal.luhs.org>

1. Click on **EPIC/EMR**



2. Click on **Hyperspace Production**



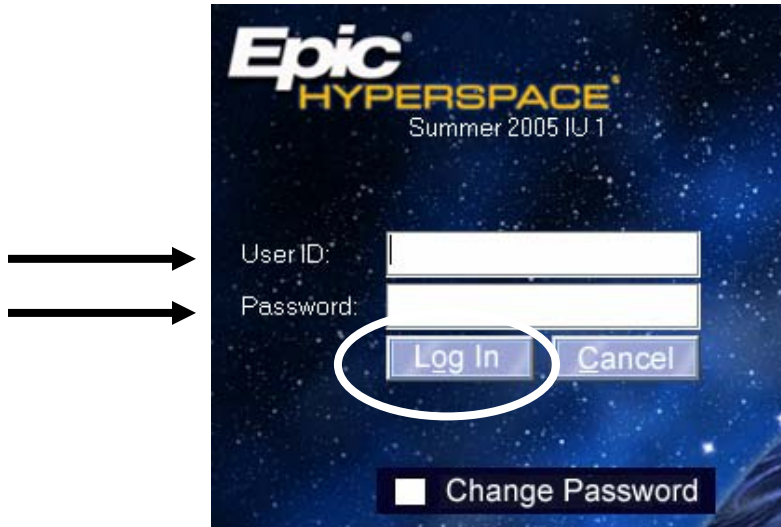
3. Click on **Login** on the top left hand side of the screen



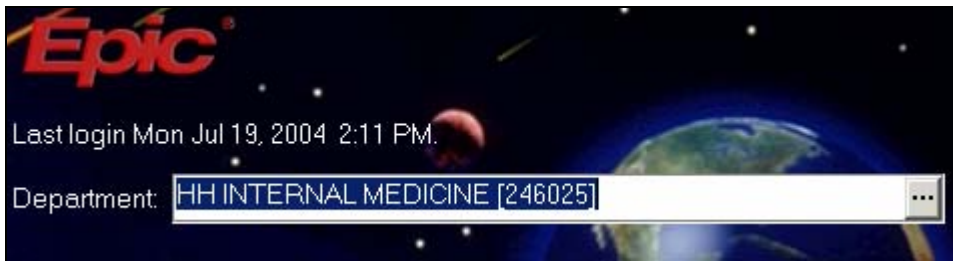
4. Enter your **User ID** (*Assigned ID*)
5. Press **Tab** or **Enter**
6. Enter your **Password** (*Provided*)

Note: To protect your security, both your User ID and password appear as (#) rather than the characters entered.

7. Click **Log In** or press **Enter**




8. Accept the default department and press **Enter**.



Logging out of Hyperspace

There are three ways to leave Hyperspace. You can logout, secure your workstation, and exit Hyperspace.

Option	Description	Keystrokes
Logging Out	Any workspace and/or patient records that were open will be closed. Another user can now log into Hyperspace.	<ul style="list-style-type: none"> ▪ Select Desktop, Logout ▪ Click Log Out on the Tool Bar
Exit Hyperspace	Hyperspace is closed entirely.	<ul style="list-style-type: none"> ▪ Click on the Close button  at top-right corner of the display

Note: After 15 minutes of inactivity, you will be logged out of Hyperspace and Citrix.

Chart Review

Chart Review offers easy access to information ranging from the patient's medications to summaries of entire encounters for that patient.

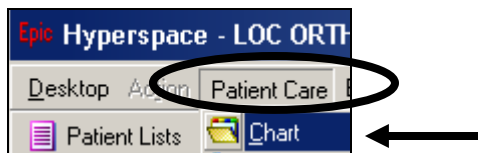
Some of Chart Reviews features are:

- **Reports.** Reports are created for you by Loyola University Medical Center Information Technology staff and a these reports that are viewed in Chart Review.
- **Filters.** On each tab, the Filter button can be used select just the item(s) you want to view. You can use multiple filters to narrow your search even further.
- **Hyperlinks.** When viewing reports, you can click hyperlinks to see attachments such as SmartForms, scanned images (x-ray) and annotated (educational) images.

Selecting a Patient

In order to open a Patient Chart, you will need to select your patient:

1. Click on **Patient Care, Chart** from the main menu



2. Enter the **Patient Name or MRN number** and click **Accept**.
3. You will automatically be taken into **Snapshot**. Click on **Chart Review** located on the left hand side of the activities menu.



Using Chart Review

By clicking on the available tabs, you can see the following items:



- **Encounters** – all encounters and future encounters for your patient.
- **Notes** – all dictated progress notes as well newly entered progress notes, Discharge summaries, Operative Reports.
- **Medications** -- the default is to show current medications only for your patient. (*Note: If you need to see Inpatient meds, click on the **Current Meds** icon to see all.*)



- **Laboratory** – all lab results
- **Rad** – all text-based imaging results
- **Reports** – Reports such as Ancillary diagnostic reports (Pathology, Echo, Bronch, etc.)
- **Other Orders** – Communications Orders (MD to RN), PT/OT/ST Certification/Recertification Orders
- **Letters** – all letters created and sent to the patient.
- **Episodes** – OB Episodes, Rehab Episodes
- **Misc. Reports** -- Chart Access, Immunization Reports, Medication Report, IP Advance Directives

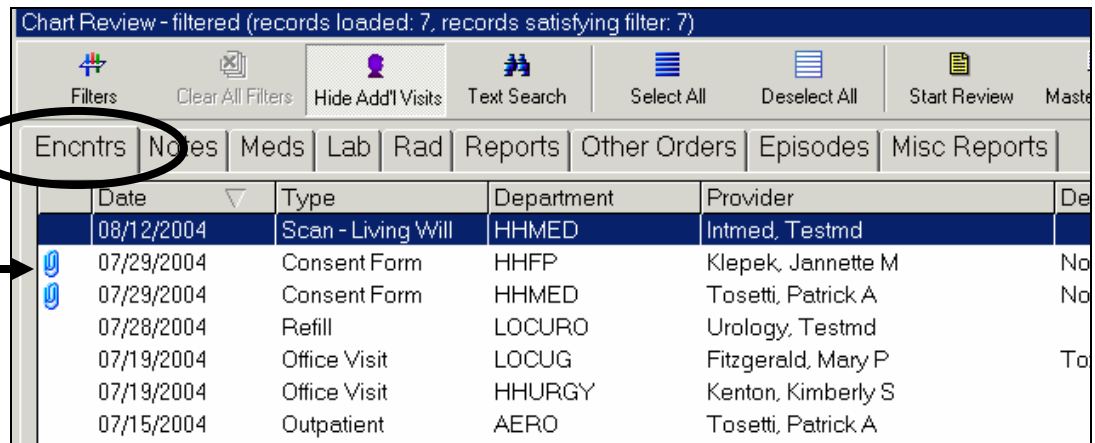
NOTE: You will NOT see medications given in Surgery, as they are not live in Epic. Please request the paper chart from Medical Records.

Some progress notes are dictated by physicians and will appear in Epic 1-2 weeks after the visit.

To open any of the items listed:

1. **Double click** anywhere on the line of the **encounter or order** you would like to review. *Note: By default, the encounters tab is selected.*
2. To select multiple items, use **CTRL+click** and click on **Start Review** or **Master Report**
3. To see an itemized list of attachments before opening a report, **right-click on the selected report.**

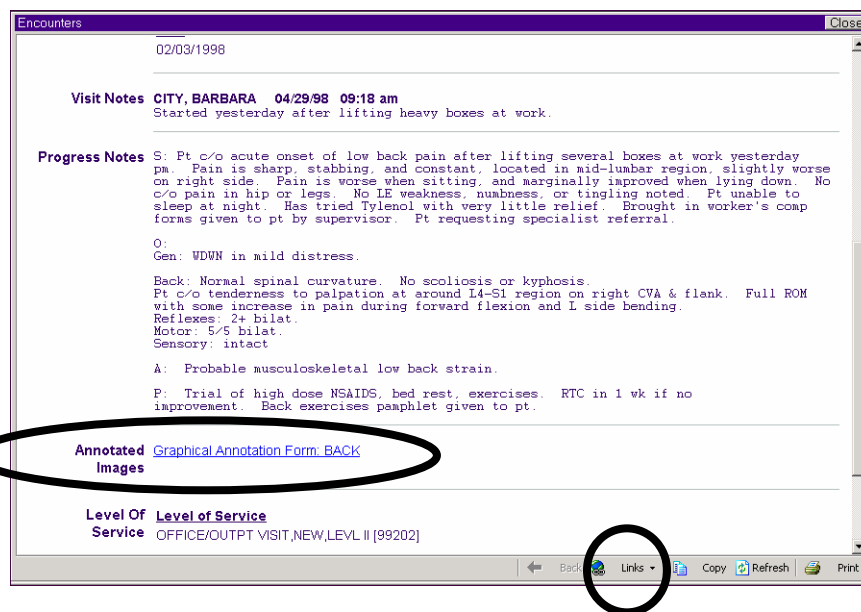
Paperclip denotes that there is an attachment. This could be a letter or image.



Date	Type	Department	Provider	De
08/12/2004	Scan - Living Will	HHMED	Intmed, Testmd	
07/29/2004	Consent Form	HHFP	Klepek, Jannette M	No
07/29/2004	Consent Form	HHMED	Tosetti, Patrick A	No
07/28/2004	Refill	LOCURO	Urology, Testmd	
07/19/2004	Office Visit	LOCUG	Fitzgerald, Mary P	To
07/19/2004	Office Visit	HHURGY	Kenton, Kimberly S	
07/15/2004	Outpatient	AERO	Tosetti, Patrick A	

4. The paperclip icon on the far left denotes an attachment to the encounter.
5. To see a list of attachments (scans, dictation, addenda) when viewing a report, click the **Links** button on the bottom toolbar to see a list of all attachments included in the report.

This image is a link



02/03/1998

Visit Notes CITY, BARBARA 04/29/98 09:18 am
Started yesterday after lifting heavy boxes at work.

Progress Notes S: Pt c/o acute onset of low back pain after lifting several boxes at work yesterday pm. Pain is sharp, stabbing, and constant, located in mid-lumbar region, slightly worse on right side. Pain is worse when sitting, and marginally improved when lying down. No c/o pain in hip or legs. No LE weakness, numbness, or tingling noted. Pt unable to sleep at night. Has tried Tylenol with very little relief. Brought in worker's comp forms given to pt by supervisor. Pt requesting specialist referral.

O:
Gen: WDWN in mild distress.

Back: Normal spinal curvature. No scoliosis or kyphosis.
Pt c/o tenderness to palpation at around L4-S1 region on right CVA & flank. Full ROM with some increase in pain during forward flexion and L side bending.
Reflexes: 2+ bilat.
Motor: 5/5 bilat.
Sensory: intact.

A: Probable musculoskeletal low back strain.

P: Trial of high dose NSAIDS, bed rest, exercises. RTC in 1 wk if no improvement. Back exercises pamphlet given to pt.

Annotated [Graphical Annotation Form BACK Images](#)

Level Of [Level of Service](#)
Service OFFICE/OUTPT VISIT_NEW,LEVEL II [99202]

Back Links Copy Refresh Print

6. To search for a word in a report: **CTRL + F**

Creating a Filter

1. Click on the Filters button to open the Filter panes. You can filter on any of the items listed and then narrow down the filter by clicking on the specific items listed under that filter.
2. For example, a filter was created for **Test, CBC**

The screenshot shows the 'Chart Review' interface with a filter applied. The title bar indicates 'Chart Review - filtered (records loaded: 401 (all records loaded), records satisfying filter: 22)'. The 'Filters' button is circled in the top toolbar. The 'Lab' tab is selected in the main menu. The 'Filter on Test' pane is open, showing a list of tests with 'CBC' selected. The 'Start Review' and 'Lab Flowsheet' buttons are also circled. The main table displays a list of records with columns for Date/Time and Test.

Date/Time	Test
11/30/2006 0917	CBC
11/08/2006 1841	CBC
11/08/2006 1834	CBC
11/08/2006 1834	CBC
01/07/2006 0400	CBC
01/06/2006 0400	CBC
01/05/2006 0400	CBC
01/04/2006 0400	CBC
11/03/2005 1550	CBC
11/03/2005 0015	CBC
11/02/2005 0015	CBC
11/01/2005 0015	CBC
10/31/2005 0400	CBC
10/30/2005 0400	CBC
10/29/2005 0400	CBC
10/28/2005 0400	CBC
10/27/2005 0400	CBC
10/26/2005 0400	CBC
10/25/2005 2050	CBC
10/25/2005 2015	CBC
10/25/2005 0839	CBC
10/25/2005 0815	CBC

3. To view all CBC's, one test at a time, click on **Start Review**
4. To view the results in a flowsheet, click on **Lab Flowsheet**.

Snapshot

The first screen you will enter is the Snapshot Activity. From this screen you can view the following:

- Problem Lists
- Allergies
- Medicaitons
- Immunizations
- Health Maintenance
- Medical History
- Family and Specialty Comments.

The screenshot shows the SnapShot application interface. At the top, the title bar reads "SnapShot" and the report name is "SnapShot [100180 ...]". Below the title bar, there are navigation icons and the text "RN Pt Care Summary". The main content area is divided into several sections:

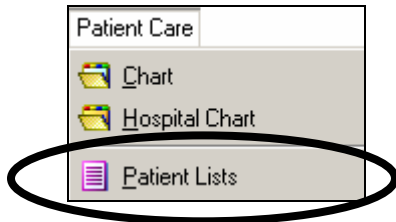
- Problem List:**
 - HEPATITIS B CARRIER
 - Diabetes type II
 - CORONARY ATHEROSCLEROSIS NATIVE CORONARY ARTERY
 - HEADACHE
- Health Maintenance:**
 - Overdue (red arrow icon)
 - Due On (yellow warning icon)
 - Due Soon (blue pencil icon)
 - DIABETES: EYE EXAM 01/12/1923
 - DIABETES: FOOT EXAM 01/12/1923
 - DIABETES: HGB A1C 01/12/1923
 - DM/CV DISEASE: DEPRESSION SCREENING 01/12/1923
 - DM/CV DISEASE: LDL 01/15/2005
 - ADULT VACCINE: INFLUENZA, AT RISK 09/01/2007
 - ADULT VACCINE: TETANUS(TD) BOOSTER, EVERY 10 YR 12/06/2014
 - DIABETES: URINE MICROALBUMIN 03/15/2008
- Reminders and Results:**
 - None
- Allergies:**
 - HALETHAZOLE Patient unable to specify symptoms
 - PENICILLINS
 - SULFA DRUGS
 - SOAP
 - AMOXICILLIN
 - SINEMET (CARBIDOPA W- LEVODOPA)
 - MOLDS & SMUTS Diarrhea
 - PEANUTS Rash
- Medications:**
 - LIPITOR 40 MG PO TABS
 - METOPROLOL TARTRATE 100 MG PO TABS
 - OMEPRAZOLE (PRILLOSEC) 40 MG PO CPDR
 - VASOTEC 20 MG PO TABS
 - PROCARDIA 10 MG PO CAPS
 - LISINOPRIL 30 MG PO TABS
- Immunizations/Injections:**
 - Epogen Inj 1000 Units 9/28/2004
 - Hepatitis A 6/30/2005
 - Influenza Vacc Age 18 & Above 10/12/2006
 - Td 4/26/2005
 - Tuberculin Skin Test 11/8/2005, 11/8/2005

In the Snapshot screen, there are several reports available. One report to see Medications given in the hospital is the IP Meds Summary (MAR). This report is available if you select a Hospital Discharge Encounter.

Creating a Patient List

If you are going to be reviewing the same patients each time you log into Epic, it will be easier to locate your patients if you create a Patient List.

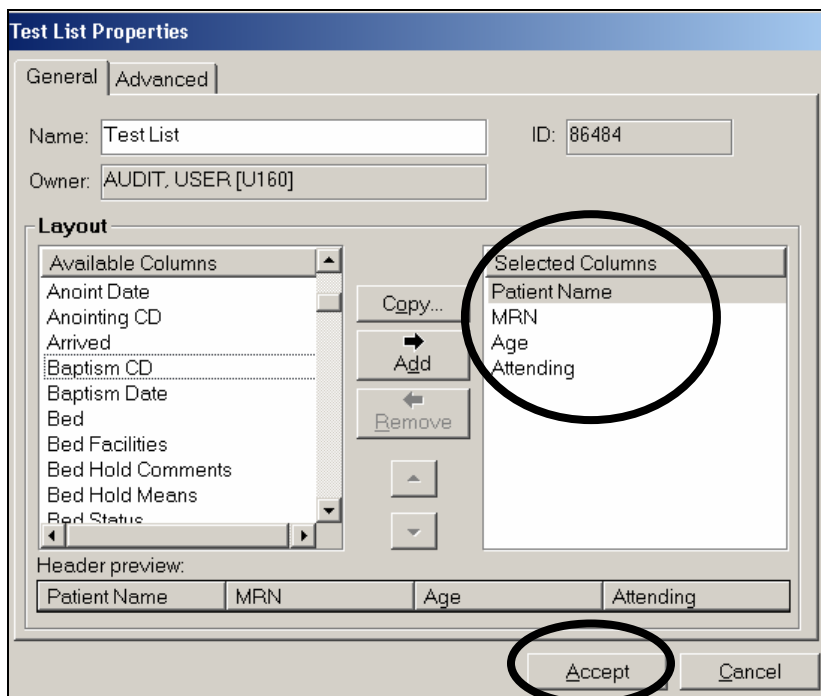
1. Click on **Patient Care, Patient Lists**



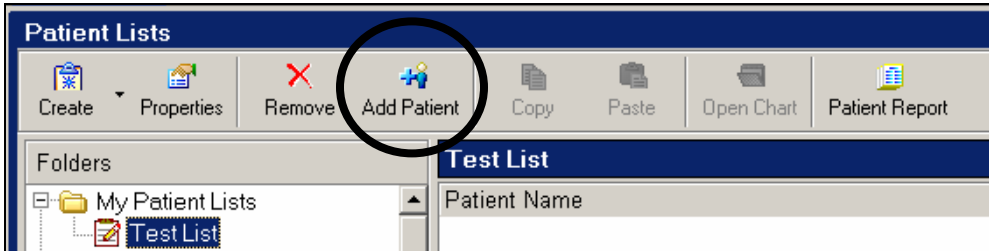
2. **Right Click** on **My Patient Lists** and click on **Create My List**



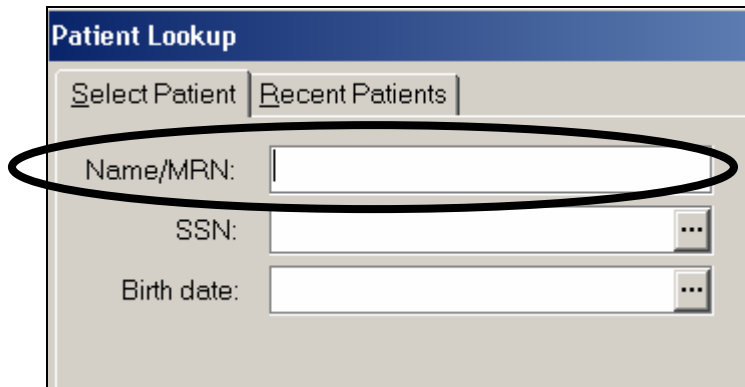
3. Add the columns you would like to display and click on **Accept**.



4. Click on **Add Patient**

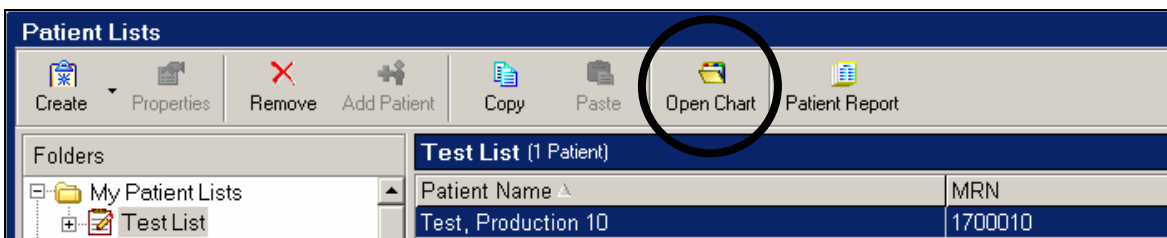


5. Enter your **Patient Name/MRN**



6. Click on **Open Chart** and you will see the Patient Summary screen.

7. Click on **Chart Review** from the activities menu (left side of the screen).

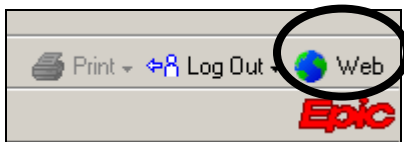


Locating Data in Epic

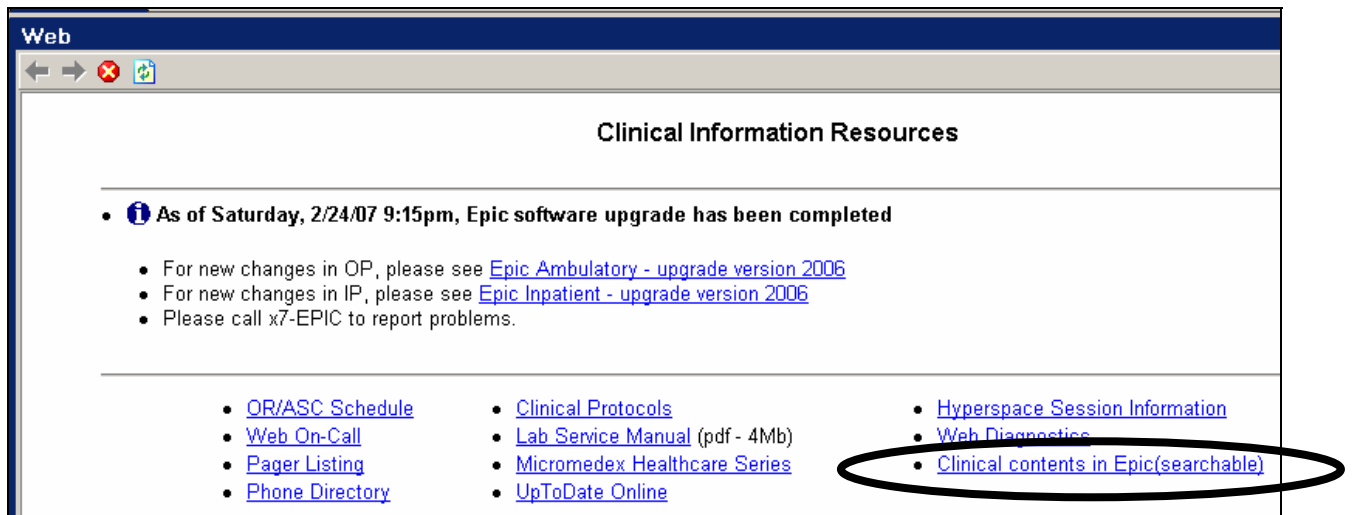
If you need to locate information in Epic and you are not finding the data, please use the Web Link while in Epic Hyperspace to determine when the data was actually entered into Epic.

Using the Web Link

1. Click on the **Web Link** on the far right side of the screen



2. Click on **Clinical contents in Epic (searchable)**



3. Enter a topic in the search box and click **Search**. Look at the date field to determine when the data was officially entered in Epic. All data is listed and you can scroll through the data as well.

MEDICAL RECORDS - WHERE IS IT AT LOYOLA MEDICINE?

[Give us feedback](#)

The search box searches the **Item**, **Alias** and **Where in EPIC** columns