



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

Version: Spring 2007 – Update April 2008

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>

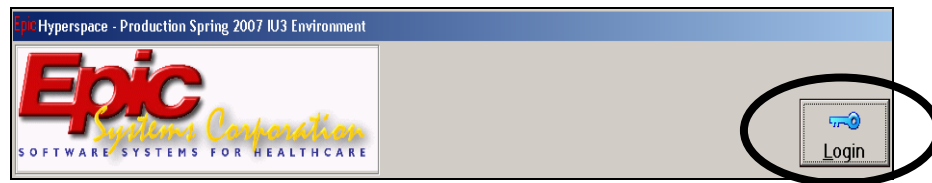
1. Click on **EPIC/EMR**



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** or click **OK**



Logging out of Hyperspace

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

	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 OutPatient Surgery (ASC), 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 days 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.**

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

Date	Discharge Date	Type	Department	Provider	Description
04/04/2008		History	LOCOBG	Physician, Notes Combined	
04/04/2008		OB Office Visit	LOCOBG	Physician, Notes Combined	
04/04/2008		Multidisciplina...	LOCMED	Physician, Notes Combined	
04/03/2008		Multidisciplina	LOCMED	Siteone Testmd	

This icon denotes a questionnaire was completed.

4. 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

This image is a link

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' application interface. At the top, there is a toolbar with buttons for 'Filters', 'Text Search', 'Refresh', 'Select All', 'Deselect All', 'Review Selected', 'Master Report', and 'Flowsheet'. Below the toolbar is a navigation bar with tabs for 'Encntrs', 'Notes', 'Meds', 'Lab', 'Rad', 'Reports', 'Other Orders', 'Letters', 'Episodes', 'Media', and 'Misc Reports'. The main area is divided into two panes. The left pane is titled 'Filtered: Hide Add'l Visits, Test' and contains a list of filter categories with their corresponding values. The 'Encounter Departm...' category is expanded, and 'Test' is selected with a checkmark. The right pane is a table with columns for 'Date', 'Discharge Date', and 'Type'. Below the filter panes is a table of test results. The 'CBC' test is selected with a checkmark. At the bottom, there is a 'Date Range' section with 'From' and 'To' fields, and buttons for 'Save', 'Edit', 'Clear All Filters', and 'Close'.

Attachment Type	Episode Linked Pr...	Date	Discharge Date	Type
Chief Complaint	Episode	09/24/2007		Teleph
Department Specialty	Medication	08/13/2007		Orders
Dx/Impressions	Primary Dx			Load r
Encounter Class	Provider			
Encounter Departm...	<input checked="" type="checkbox"/> Test			
Encounter Type				

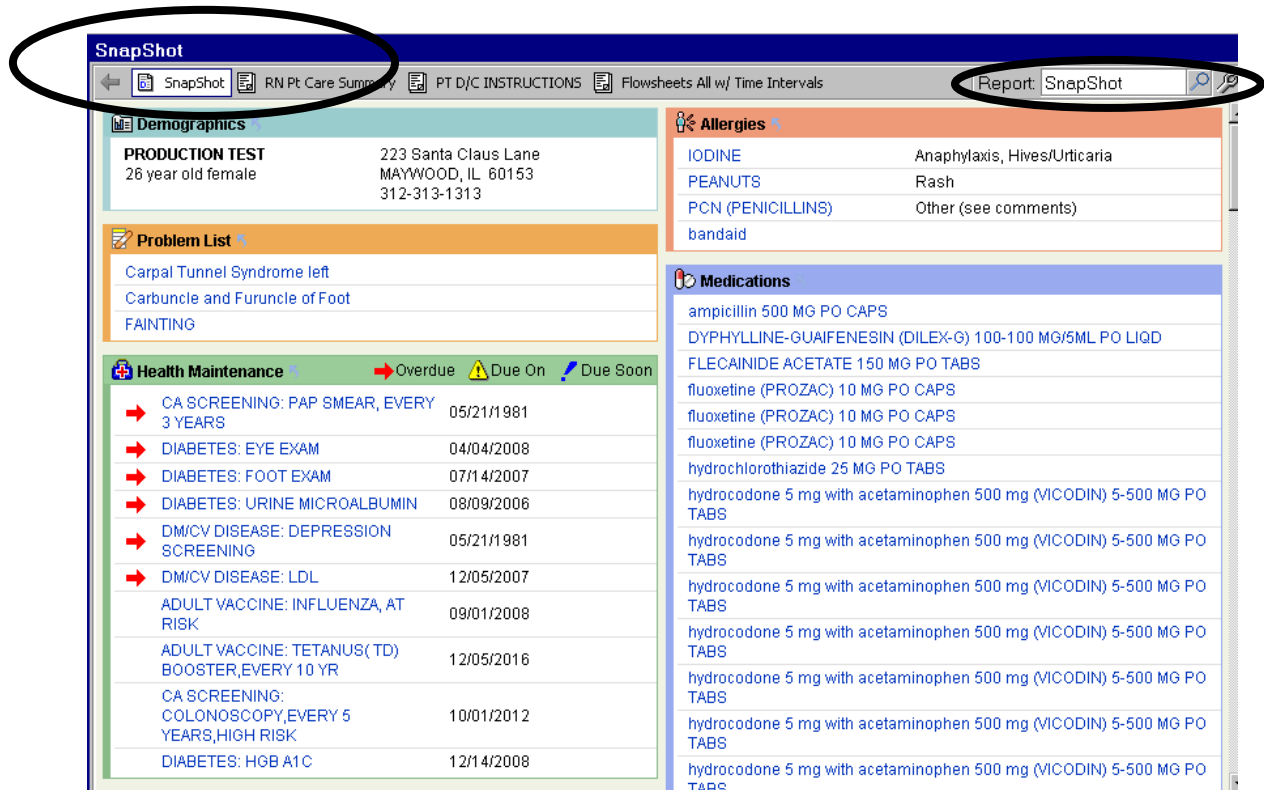
Test	#Enc	Last Date
<input type="checkbox"/> ADD ON LAB T...	1	02/07/2008
<input type="checkbox"/> ANKLE 2 VIEWS...	1	08/10/2007
<input type="checkbox"/> APPLICATION O...	1	08/23/2007
<input type="checkbox"/> BLOOD CREA N...	1	01/18/2008
<input checked="" type="checkbox"/> CBC	2	09/24/2007
<input type="checkbox"/> CHEST 2 VIEWS...	1	01/03/2008
<input type="checkbox"/> COLONOSCOPY	1	09/25/2007
<input type="checkbox"/> COMPLETE ME...	1	01/24/2008
<input type="checkbox"/> CT BAXTER P...	1	11/20/2007
<input type="checkbox"/> CT ABDOMEN & ...	1	01/16/2008

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

Snapshot

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

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



In the Snapshot screen, there are several reports available. **Click on the Report drop down** to see a list of available Reports.

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.

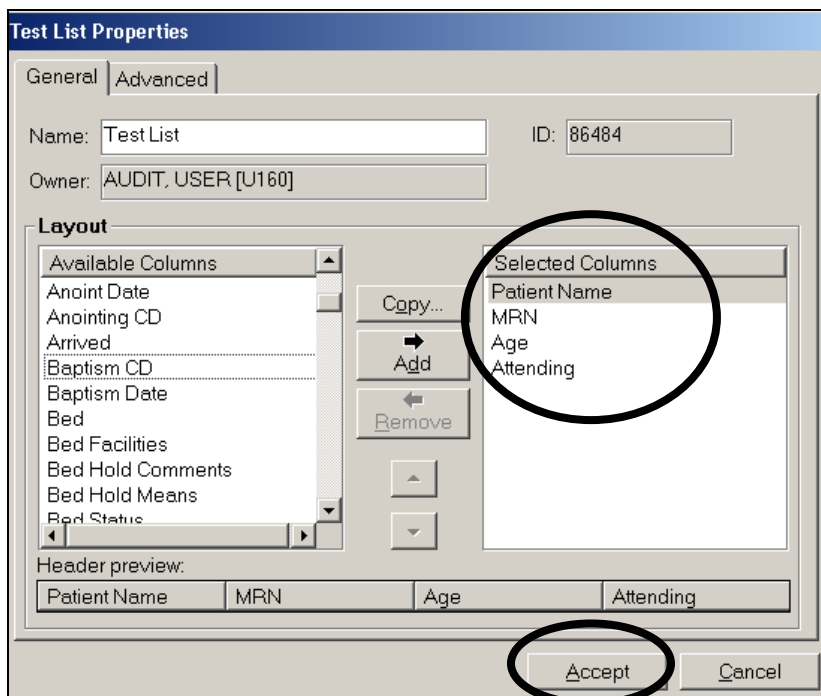
1. Click on **Patient Care, Patient Lists**



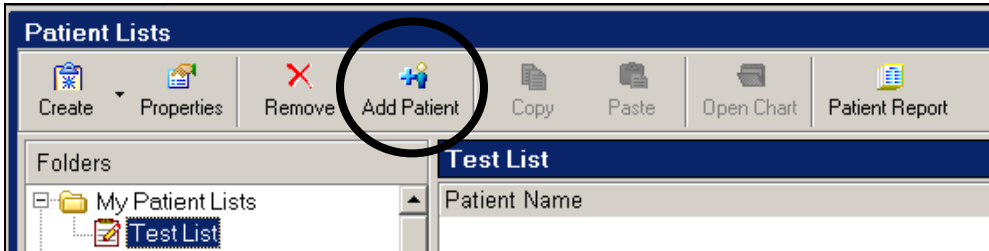
2. **Right Click** on **My Patient Lists** and click on **Create My List**



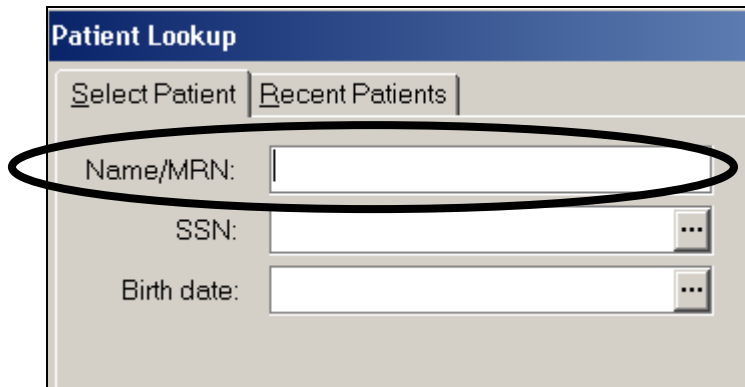
3. Add the columns you would like to display and click on **Accept**.



4. Click on **Add Patient**

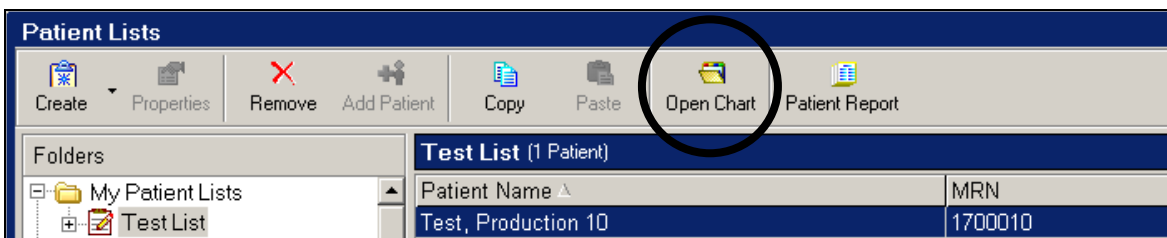


5. Enter your **Patient Name/MRN**



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

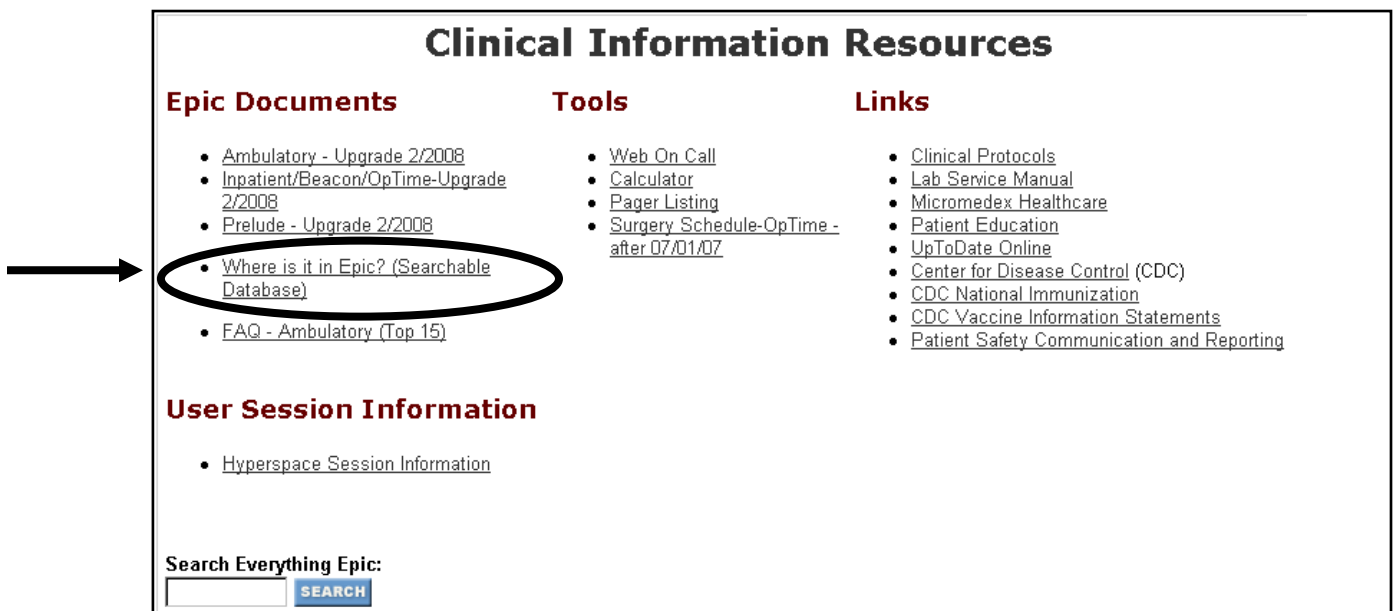
If you need to locate information in Epic and you are not finding the data, please use the Web Link while in Epic Hyperspace to determine when the data was actually entered into Epic.

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)**



Clinical Information Resources

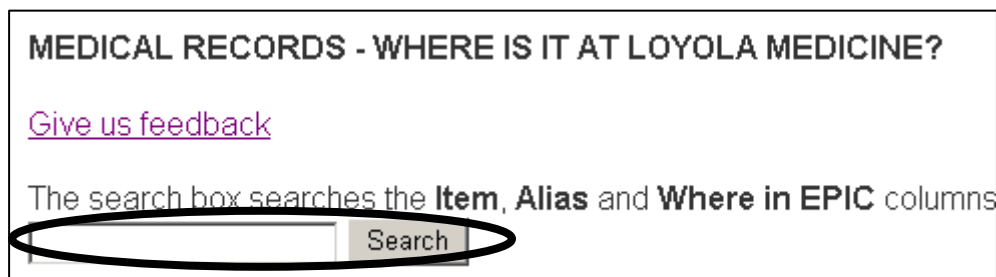
Epic Documents	Tools	Links
<ul style="list-style-type: none">• Ambulatory - Upgrade 2/2008• Inpatient/Beacon/OpTime-Upgrade 2/2008• Prelude - Upgrade 2/2008• Where is it in Epic? (Searchable Database)• FAQ - Ambulatory (Top 15)	<ul style="list-style-type: none">• Web On Call• Calculator• Pager Listing• Surgery Schedule-OpTime - after 07/01/07	<ul style="list-style-type: none">• Clinical Protocols• Lab Service Manual• Micromedex Healthcare• Patient Education• UpToDate Online• Center for Disease Control (CDC)• CDC National Immunization• CDC Vaccine Information Statements• Patient Safety Communication and Reporting

User Session Information

- [Hyperspace Session Information](#)

Search Everything Epic:

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