# Quick Start Guide

## Pre-Procedure Evaluation Phone Call Workflows with Covid-19 Testing Steps


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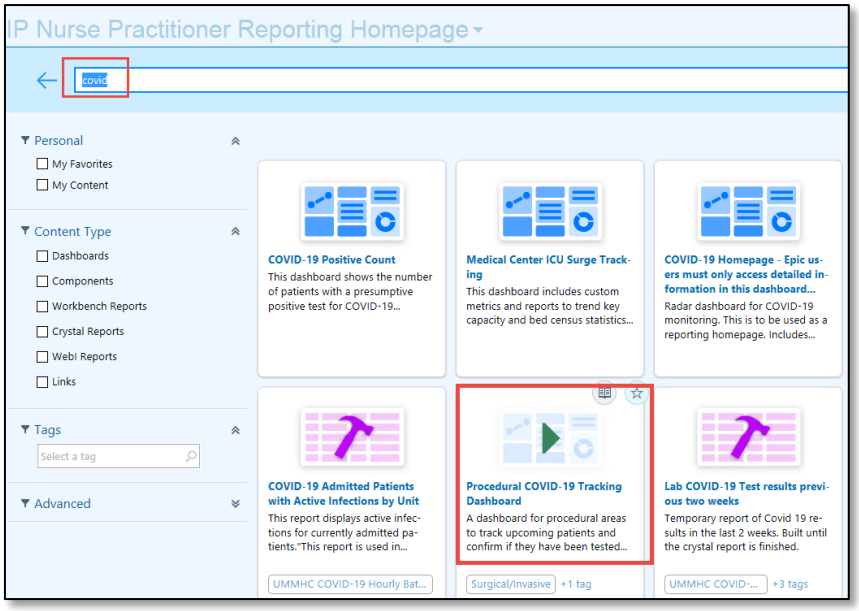
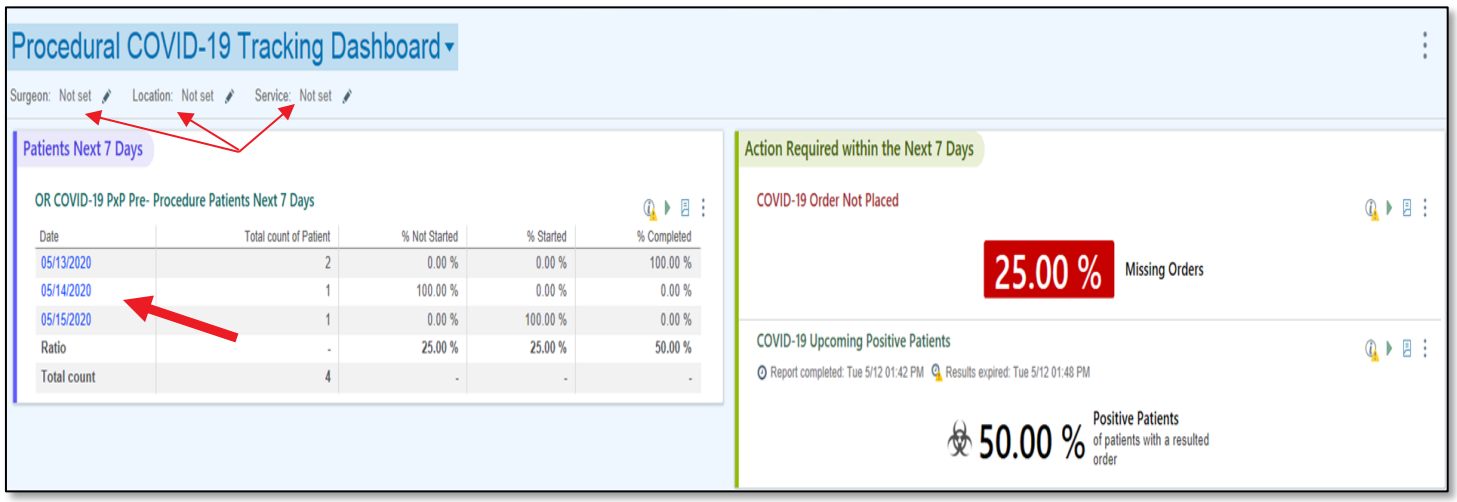
# Dashboard: Procedural Covid-19 Tracking

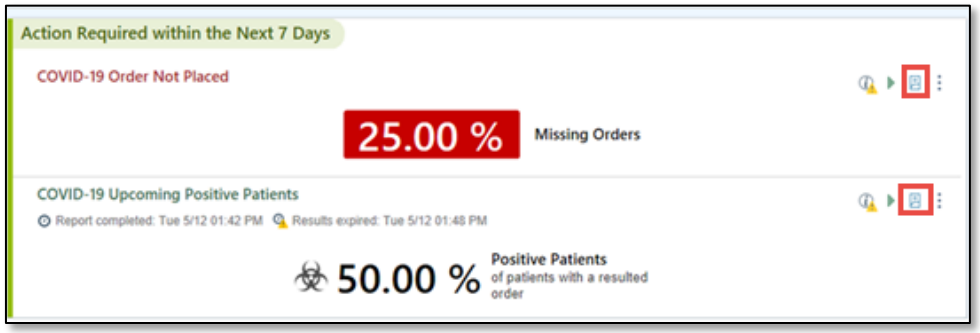
1. Log into Epic
2. Click the Dashboard Workspace Tab
3. Using the dropdown, select the Procedural '**COVID-19 Tracking Dashboard**'



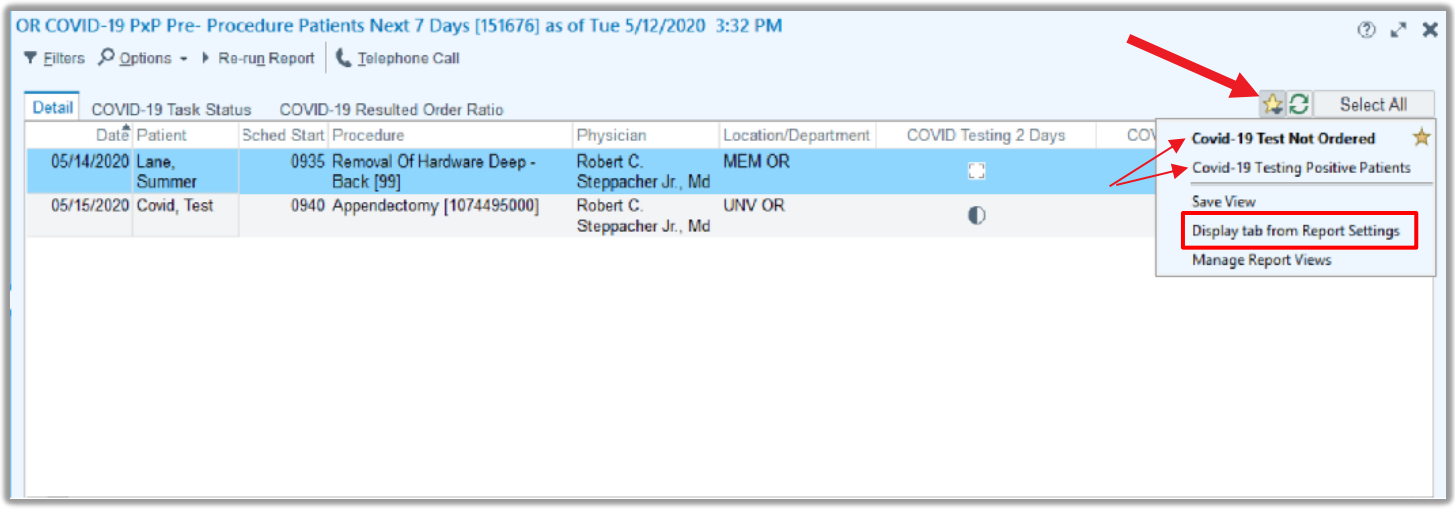

4. Find specific patients scheduled for procedures within the next 7 days using filters for:
    a. Surgeon
    b. Location
    c. Service
5. Click the date hyperlink to open the report of patients scheduled on that specific date.



6. For the **Covid-19 Order Not Placed** and **Covid-19 Upcoming Positive Patients** reports, click on the paper icon on the right to access the drill down reports.




7. Click the Star Icon dropdown to change views once in the report. Select **Covid-19 Test Not Ordered** or **Covid-19 Testing Positive Patients** to toggle between reports.




8. In order to get back to the default view, select **Display tab from Report Settings** button under the Star Icon dropdown.

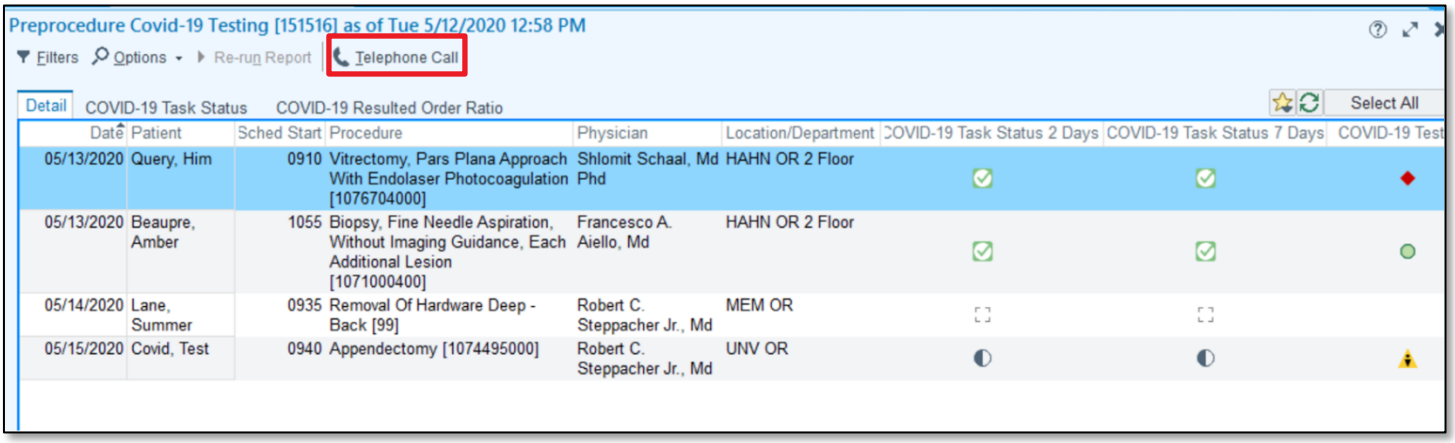
# Reports

From this screen, you can see columns for COVID-19 Task Status for 2 Days prior to surgery, as well as 7 days prior to surgery.

a. A white square icon represents a test has not been ordered.
b. A half-filled circle icon represents the test has been started

The user can also see a column for the COVID-19 Test Status within 7 days. This column will display a positive, negative, collected, or not collected status for the COVID-19 test within the last 7 days. Hover over the column heading to display more information.

a. A red icon represents a positive result.
b. A green icon represents a negative result.
c. A yellow triangle icon represents a result that has not been collected.

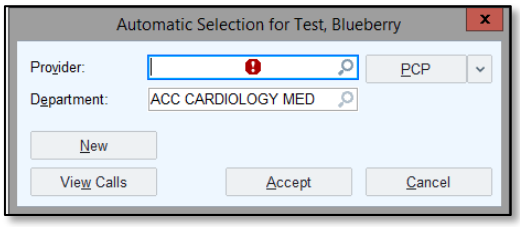



**If the COVID-19 Test has not been ordered for the patient:**

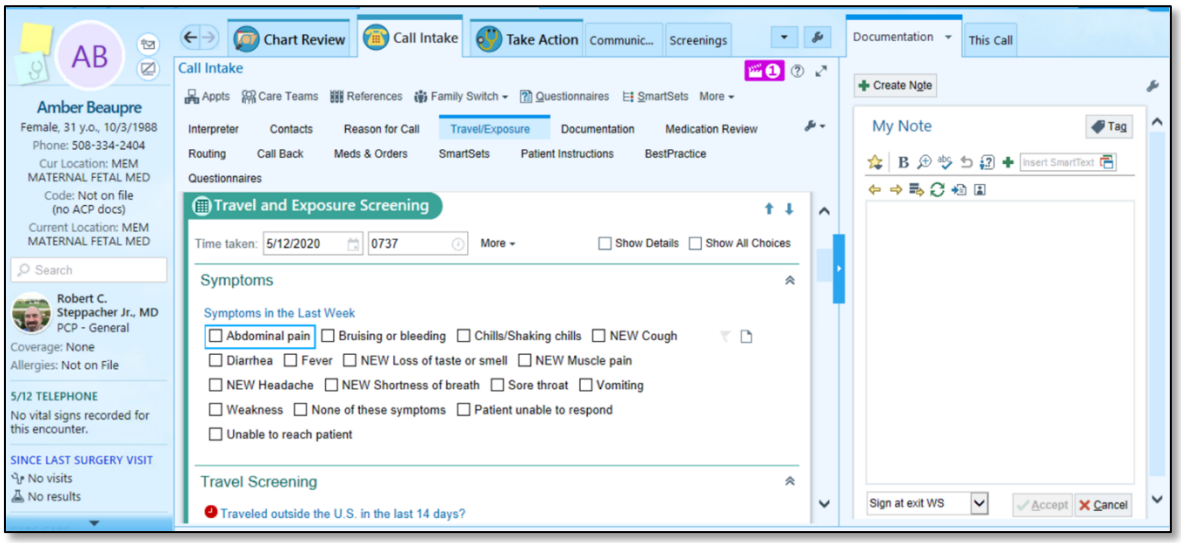
From this report, the user can see whether or not the test has been ordered for the patient. If the test has not been ordered for the patient, a **telephone call** to the patient must be initiated.

# Telephone Encounter

1. To begin the Telephone Encounter, click the **Telephone Call** button.
2. **If prompted**, enter in the **Provider** you are documenting the call for. If not, skip to **step 3.**

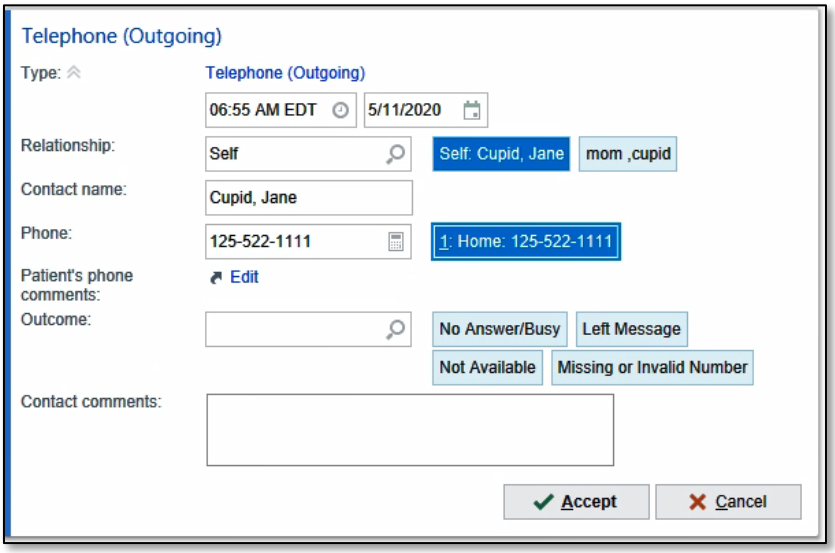



3. **Call Intake** activity will appear.



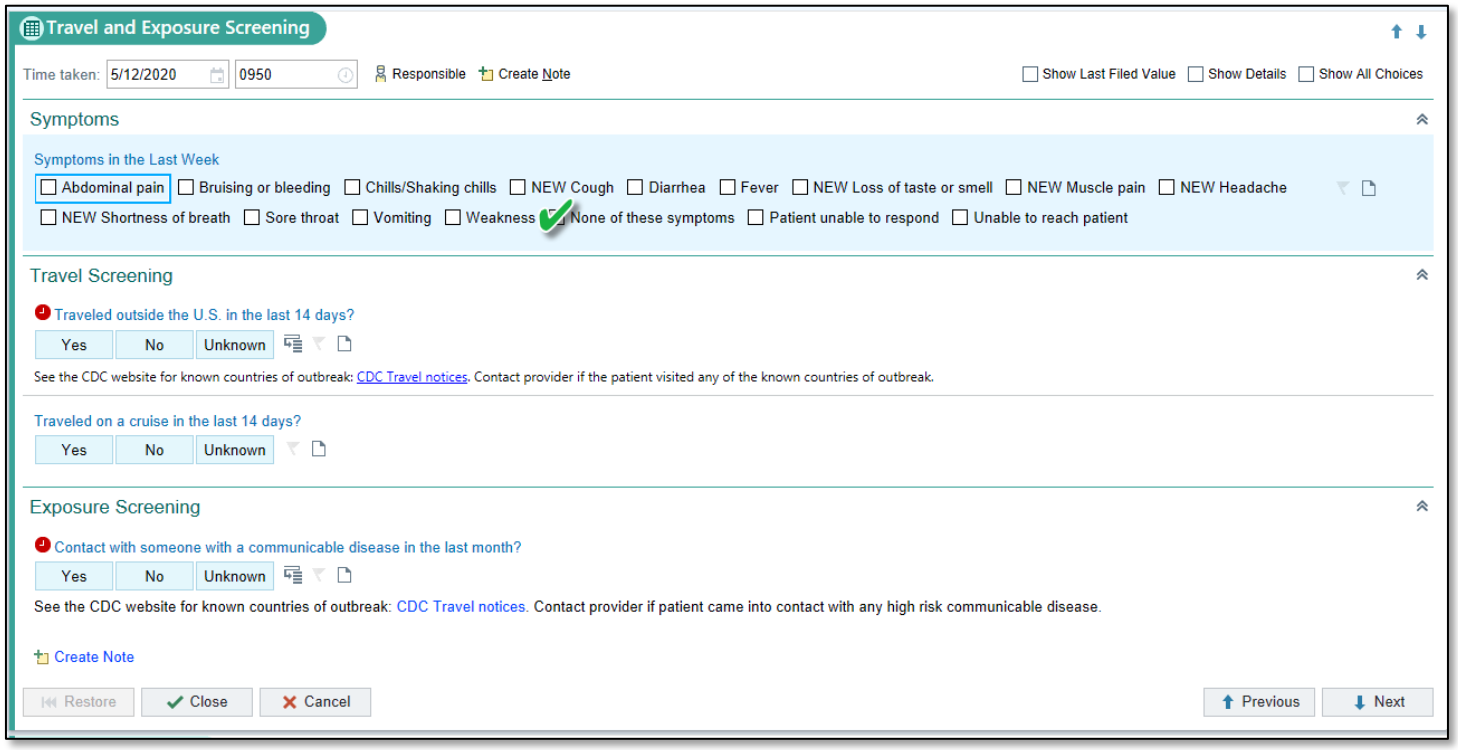

## Contacts

1. Select **Outgoing Call**. Complete the required sections



**NOTE**: You do not need to select an **OUTCOME** if you speak to the patient. Also, the contact comments should only be used for "left message with spouse", etc.

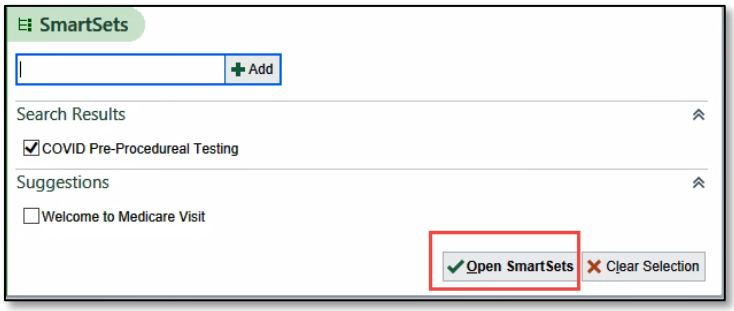
## Travel Screening



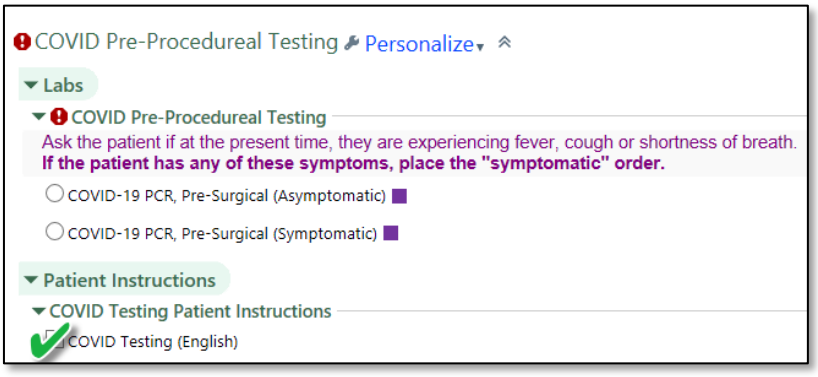

**NOTE**: If the patient has **NOT** had any symptoms within the last week, you **MUST** check of "**None of these symptoms**" for the screening to save correctly.

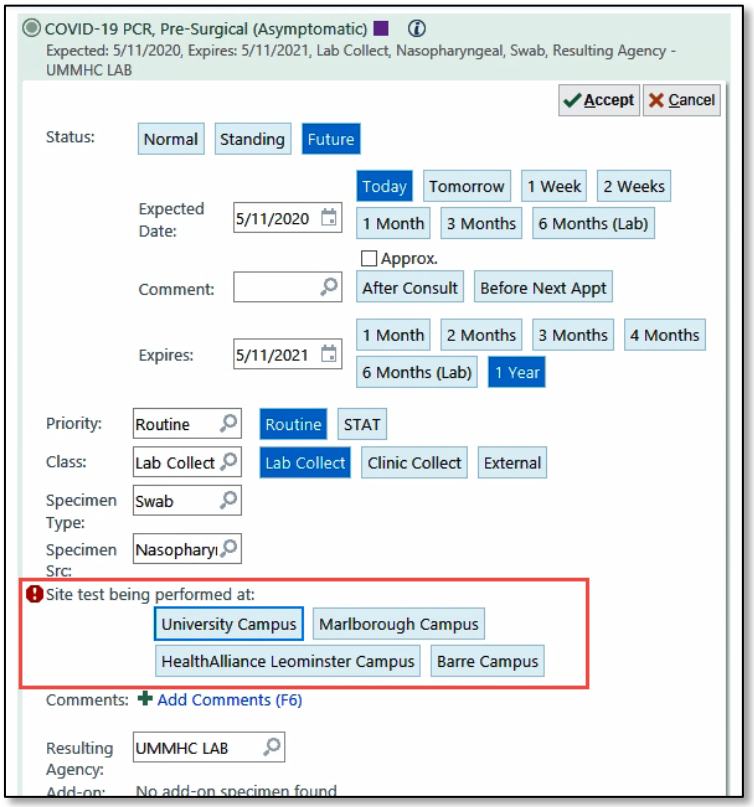
## SmartSets

1. Search for Smartset (**1153) COVID Pre-Procedural Testing .**
    a. Click **Add.**
    b. **Click Open SmartSets**



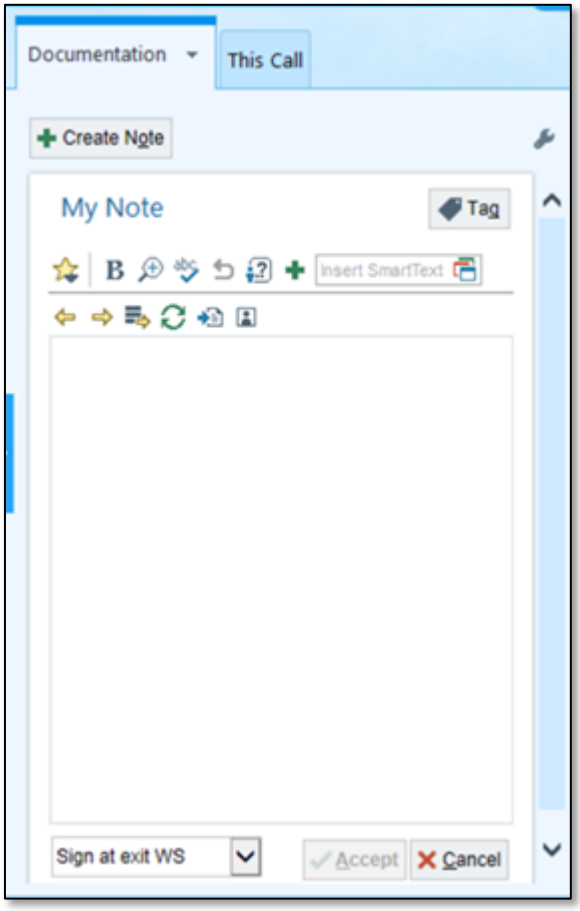
c. Choose the appropriate test, **asymptomatic** or **symptomatic** AND the **Patient Instructions**. Complete the required field of **location**.



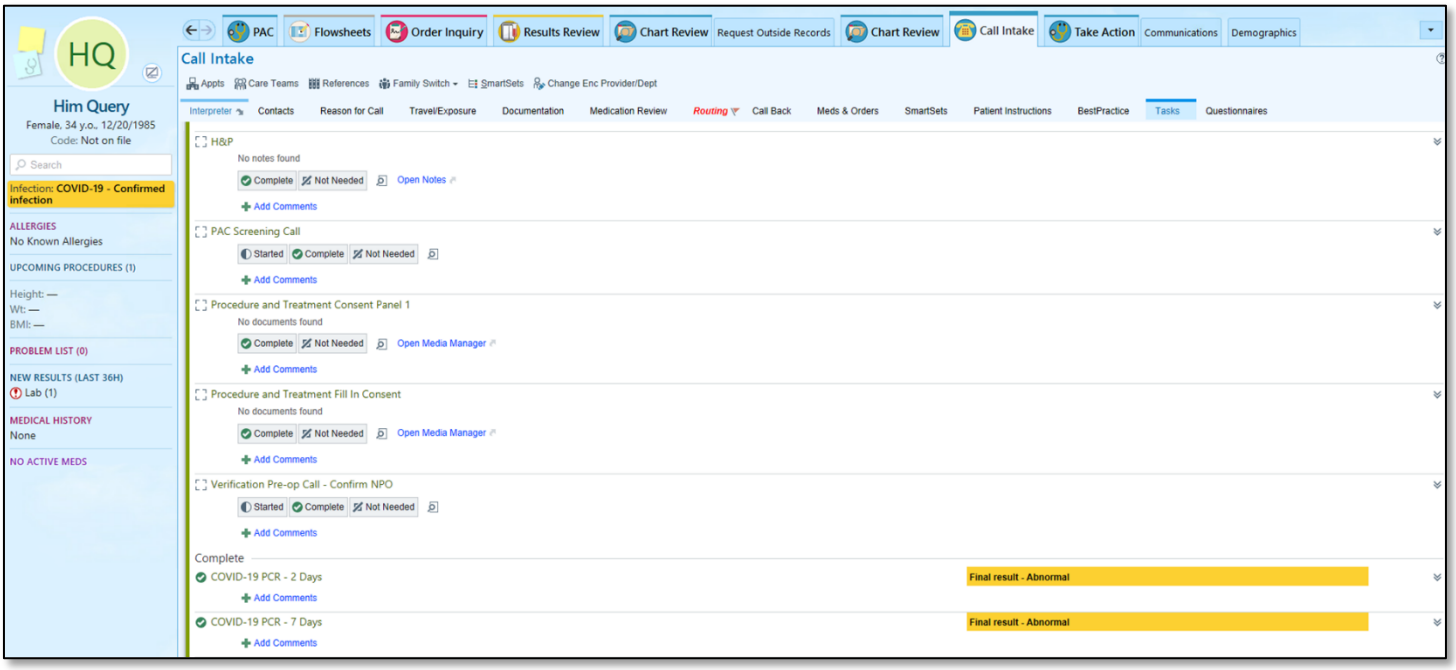
## Notes

4. Document the rest of your call in the **Notes** section
5. You can utilize the following SmartPhrases
    a. **".COVIDPrePro72hrs" (72 Hour Preprocedural COVID Screening Call)**
    b. **".COVIDPrePro24hrsNEGRESULT" (24 Hour Preprocedural COVID Screening Call – Negative result)**
    c. **".COVIDPreProPOSRESULT" (Preprocedural COVID Screening – Positive result)**



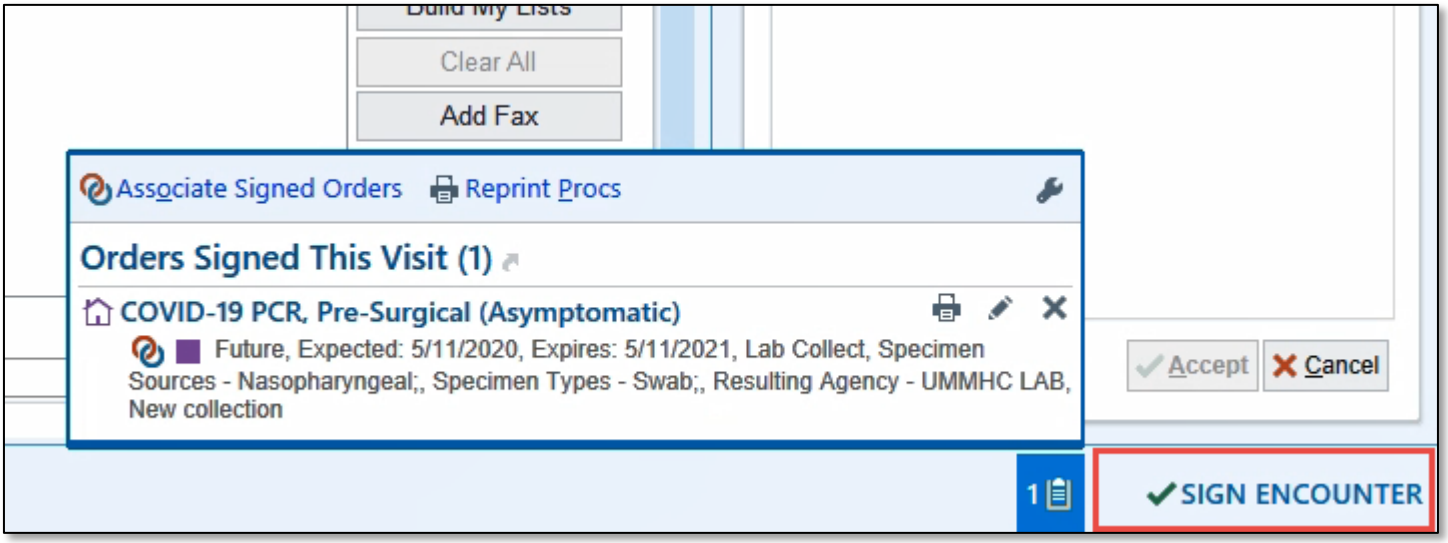
## Task Section

6. Review COVID-19 testing task status during the call.




## Sign Encounter

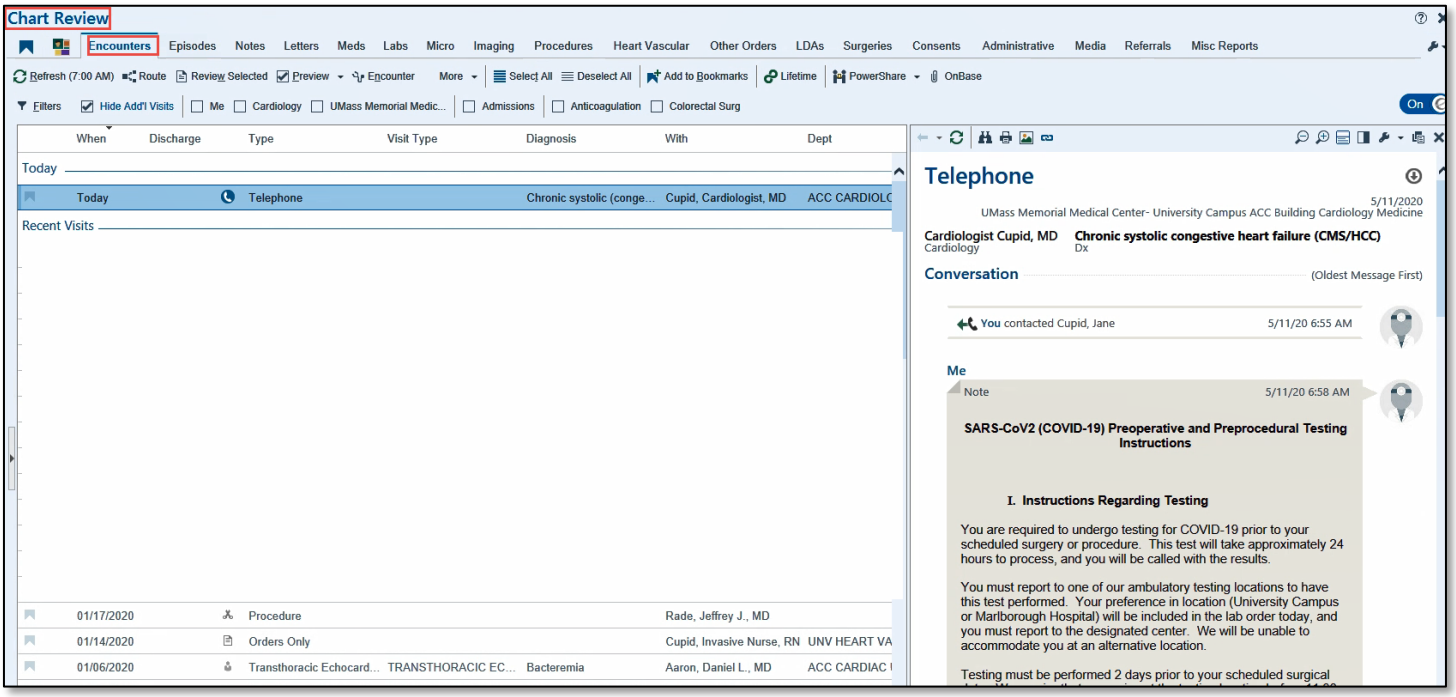
7. Click the **Sign Encounter** button on the buttom right of the screen.

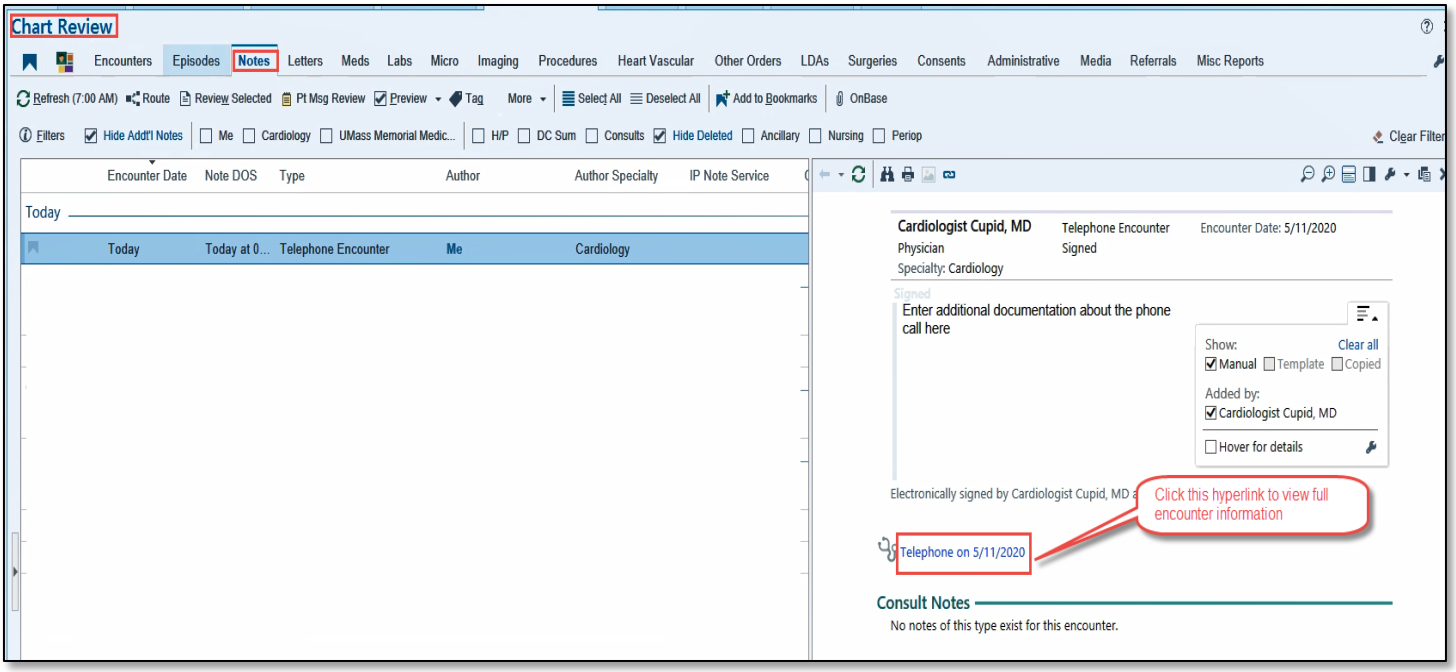


# Where to Find Encounter Information

The information documented in this Telephone Encounter can be found in Chart Review on the Encounters Tab and the Notes Tab.

## Encounters Tab:




## Notes Tab: