

# EPIC TRAINING



## Canto Quick Start Guide

HOUSTON  
**Methodist**<sup>®</sup>  
LEADING MEDICINE





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## Getting Started

Welcome to Canto, Epic's mobile app for the Apple iPad®.

### Log in


 If you forget your Epic user ID or password, [Contact the HelpDesk @x75600](#)

 Tap and hold an item on the screen to see a tooltip with more information on patients, appointments, In Basket messages, and more.

## Use the dashboard

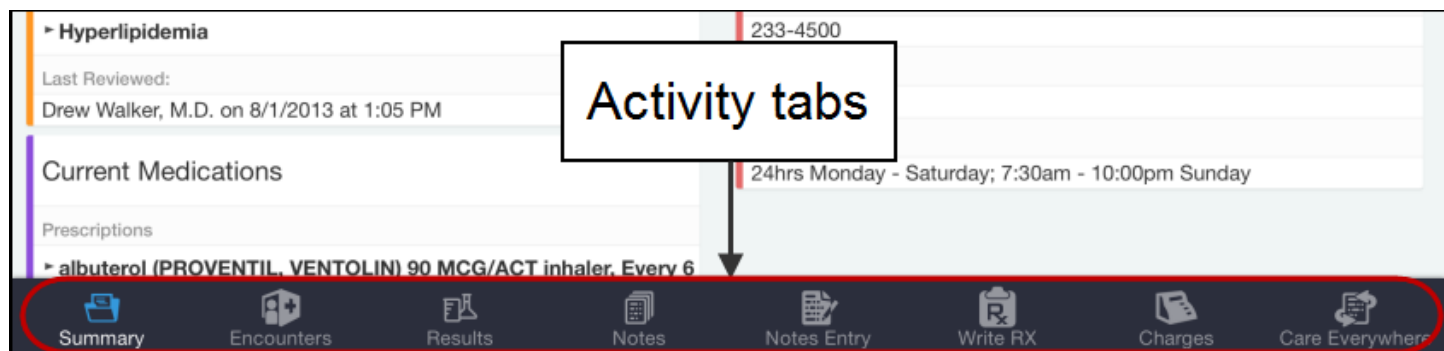
The dashboard is your home workspace in Canto. From the dashboard, you can open:

- A patient's chart by tapping on the patient's name from Patient Lists or your Schedule, or by searching the patient's name in the Search Patients field.
- An In Basket folder by tapping on the name of the folder.
- A dictation by tapping on its title.

 You can customize the activities that appear on the dashboard from your device settings.

## What is an activity?

Each activity supports a specific task, such as reviewing the chart or e-prescribing medications. You can access activities from the tabs on the bottom of the screen or by tapping a patient's name from the schedule or patient list.






## See more of the screen

Hold the device horizontally, in landscape mode, to make more efficient use of the screen when reading patient reports or In Basket messages.

## Log out


When you leave Canto to go to your device home screen or switch to another app, Canto continues to run in the background. For security reasons, Canto automatically logs you out after 20 minutes of inactivity. You can also manually log out.




1. From the dashboard, tap .
2. Tap **Logout**.


## Find Your Patients

You can find hospital, clinic, and surgery patients in Canto. The tool you use to find the patient depends on where he is located, as described in the following topics. After you find the patient, tap his name to open the chart.

### Find admitted patients

If you've set a default patient list in Hyperspace, it appears when you open the app. Otherwise, all patient list folders appear. With a default list, you don't have to pick one from your folder each time you open the app. You can tap  on the dashboard to access other available patient lists. The following icons indicate that a patient has new information to review.

-  indicates new abnormal results.
-  indicates new critical results.
-  indicates new notes.

To edit a patient list, open the list and tap **Edit**. To remove a patient from the list, tap the  icon and then tap **Remove**. To add a patient, tap **+**, search for a patient, and then select the patient. When you are finished editing the patient list, tap **Done**.



Walker Attending (9 Patients)	
<b>Atwood, Glen</b> 305/305 Micu, Emc [Blue Ring] [Yellow Ring] Pat Cooper, M.D.	55y M
<b>Bartine, Luther B</b> 538/538-1 Medsurg 2, Emc [Blue Ring] [Yellow Ring] Pat Cooper, M.D.	84y M
<b>Clifford, Michael B.</b> 586/586 Medsurg 1, Emc [Yellow Ring] Drew Walker, M.D.	64y M
<b>Davis, Andrew</b> 532/532-2 Medsurg 2, Emc Terry Clemmer, M.D.	66y M
<b>Gunther, John</b> OFF THE FLOOR 6/OTF6 Emergency Dept, Emc [Yellow Ring] Corey Farrell, M.D.	56y M
<b>Henderson, Elizabeth</b> 517 Medsurg 1, Emc Drew Walker, M.D.	84y F
<b>Jordan, Robert</b> 327/327 Surgical Stepdown, Emc [Blue Ring] [Yellow Ring] Pat Cooper, M.D.	79y M
<b>Vaux, Dorothy P.</b> 334/334 Surgical Stepdown, Emc [Blue Ring] [Red Ring] Pat Cooper, M.D.	94y F

## Find clinical appointments and surgical cases

If you are using Canto for an outpatient practice, the current day's schedule is available on your dashboard. In addition, you can also see tomorrow's schedule.

If you're a surgeon and your cases are scheduled in Epic, they also appear on your schedule.

The schedule shows each patient's age and sex, as well the appointment type. The ring icons that appear around the appointment time indicate the appointment's time and length.

- A. Previous appointment (yellow), 15 minutes
- B. Current appointment (green), 15 minutes
- C. Future appointment (blue), 15 minutes



Today - Tue Jul 14		(22 Total)
<b>A</b> 12:30 PM	<b>Cobb, Zoe</b>	5y F Sch: Well Child Vmc
12:45 PM	<b>Sauls, Nancy</b>	5y F Sch: Office Visit Vmc
<b>B</b> 1:30 PM	<b>Knight, Barbara A</b>	51y F Sch: Office Visit Vmc
1:45 PM	<b>Merlin, Donna</b>	73y F Sch: Office Visit Vmc
2:00 PM	<b>Cobb, Ron</b>	50y M Sch: Office Visit Vmc
<b>C</b> 3:15 PM	<b>Lee, James</b>	55y M Sch: Office Visit Vmc
3:30 PM	<b>Maine, John</b>	44y M Sch: Office Visit Vmc
4:30 PM	<b>Jansen, Mark</b>	60y M Sch: New Patient Vmc



Surgical cases appear like this:

If your organization uses dots to mark appointments on your schedule, you can see the dot color as a bar on the left side.

9:45 AM	<b>Cobb, Scott</b>	50y M Sch: Office Visit Vmc
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## Find other patients

To find a patient who isn't on your patient list or schedule, use the search field on the dashboard. Search as you normally do in Hyperspace, using the patient's name or MRN.

If you select a patient from a search, any documentation you do in Canto is linked to the most recent available encounter. If Canto can't find a recent encounter for the patient, a new encounter is created to store your documentation.





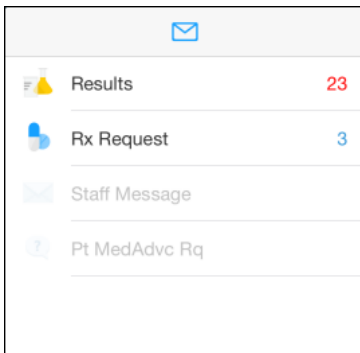
## Manage In Basket Messages

In the In Basket activity, you can read and respond to the following types of messages:

- Results
- Rx Request
- Staff Message
- Pt MedAdvc Rq

You can also create new Staff Messages.

The In Basket folder appears with the number of unread messages. The number appears in red if any of the unread messages are high priority. If you don't have any unread messages, no number appears. If you don't have any messages in that folder at all, the folder appears in gray.



## Prioritize messages

The following icons appear next to messages in a folder to help you prioritize them:

	High priority
	Low priority
	Unread message
	Pended message In Hyperspace, you can mark messages that you want to remain in your In Basket as pended.
	Overdue message In Hyperspace, when sending a message, the sender can include an action, such as "Call patient". The action can also be flagged with a due date and time. If that due date and time has passed, the message appears as overdue in Hyperspace and the app.
	You are responsible for the message.






Messages with responsibility help recipients track whether someone has started working on a task. Only the person who has responsibility for a message can mark it as done.

You can swipe left on an In Basket message and tap **Defer** to remove the message from your mobile In Basket. Messages you defer appear in your In Basket when you open it in Hyperspace, but are hidden from your mobile In Basket.

## Work with Staff Messages








You can send Staff Messages from Canto.

1. To create a new Staff Message, tap  from the In Basket activity.
2. Write your message.
3. Optionally, add the following flags to your message before sending it:
  - a.  flags the recipient to call you.
  - b.  flags the message as high priority.
4. Tap **Send** to send the message.

When you receive a Staff Message, tap  to reply or forward the message.

## Review results


The following icons can appear next to Results messages:

 and 	The patient has abnormal results. After you read the message, the icon becomes round.
 and 	The patient has critical results. After you read the message, the icon becomes round.
	The patient had a previously abnormal result for this order.
	The green circle indicates that all the patient's orders have been resultuated. A number indicates the total number of resultuated orders that you haven't yet reviewed.
	Not all orders for this patient have been resultuated. A number indicates the total number of orders that have been resultuated that you haven't yet reviewed.

Tap a result to open it.




## Reassign a Results message

To reassign responsibility for a result to another physician, you can tap  when you forward a Results message.

## Send a reminder to follow up on a result

If you see a result in a Results message that you want to investigate further, you can send yourself a reminder to do so. The reminder is sent as a Patient Reminder message with the original Results message attached to it. Note that you can only access the reminder message in your Hyperspace In Basket.

1. In a Results message, tap . The Reminder screen appears.
2. Enter any additional text you want to add to the reminder.
3. Tap **Send** to send the reminder to yourself.

## Refill prescriptions

You can refill prescriptions from the app.

1. In an Rx Request message, tap a pending medication to review the order details. The Order Details screen appears. Tap **Rx Request** to return to the message.
  - If you need to review the full chart, tap the patient's name.
2. Act on the request:
  - Tap **Edit** to selectively approve and refuse pending medications or edit the order details. The Edit screen appears. Tap a medication to edit the order details before approving it. When you are finished, tap **Accept**.
  - Tap **Approve** to approve all pending medications.
  - Tap **Refuse** twice to refuse all pending medications. The Alerts screen appears. Select a reason for refusal for each medication and tap **Accept**.
3. Tap **Sign** to sign any approved refill requests. If you have addressed all the requests in the message, it is removed from your In Basket. The Close Encounter screen appears.
  - If you aren't ready to close the encounter, toggle **Close encounter** off.
4. Tap **Accept**.





You can also swipe up on the **Patient Info** tab to see more about the patient.

## Respond to patient advice requests

You can respond to patient requests for medical advice through Pt MedAdvc Rq messages.







1. In a Pt MedAdvc Rq message, tap **View** to see any attachments.
  - If you need to review the full chart, tap the patient's name.
2. Act on the request:
  - Tap  to reply to the patient by email.
  - Tap  to forward the message to another provider.
  - Tap **Done** to remove the message from your In Basket.

## Review Patient Information

### Review a snapshot of medical information

You can see an overview of the patient's current medical information from the Patient Summary activity, which appears when you open a patient's chart. This activity includes medications, allergies, and the problem list.

In the Current Medications section, you can see these icons:

	Long-term medication
	Patient-reported medication
	Inpatient medication
	Outpatient medication

### Mark information as reviewed

You can mark allergies, active problems, and medications as reviewed while viewing them in a patient summary in Canto.

In the Patient Summary activity, tap **Mark as Reviewed** to record that you've reviewed the patient information.



Allergies	
▼ <b>Penicillins</b>	
Noted	Severity
4/10/2015	<b>Medium</b>
Reactions	Reaction Type
• <b>Hives</b>	<b>Intolerance</b>
Comments	
Itching across the entire body	
► <b>Sulfa Antibiotics</b>	
Reviewed by You at 10:48 AM <span style="float: right;">✔ Mark as Reviewed</span>	

## Review past encounters

From the Encounters activity, you can review information about previous encounters, such as a reason for the visit or admission and visit diagnoses or problems. Progress notes are included in the report, as well as vitals. You can review the orders placed during the encounter in the Order Summary section.

Tap an encounter to review it.

## Review documents from outside organizations

If your patient has associated documents from outside organizations, you can review them in the Care Everywhere Reports activity. The activity shows clinical and encounter summaries already requested from other organizations.

From a patient's chart, tap **Care Everywhere** to open the Care Everywhere Reports activity.

- Tap **Summaries** to review a patient's clinical summary.
- Tap **Documents** to review a patient's clinical documents.



Documents listed in black text are available to view, while documents listed in gray text must be requested from Hyperspace before you can view them.

## Review handoff information for admitted patients

You can review handoff information for a patient in Canto. In an admitted patient's chart, tap **Handoff**.



You can take a quick look at the handoff information for all the patients on your patient list by tapping  from the Patient Lists activity on the dashboard.



## Capture Patient Photos and Media

You can update patient photos and capture clinical images and video from the patient's chart in Canto.

### Update a patient's photo

You can update a patient's photo by taking her picture with your device.

1. In the patient's chart, tap the patient photo or camera icon in the upper-left corner of the screen. The Media Capture activity opens.
2. Tap **Take Patient Photo**.
3. Use the camera on your device to take a picture.
4. Tap **Use Photo** to save the photo to the Demographics activity in the chart.

### Capture clinical images

You can capture clinical images by taking a picture with your device.


1. In the Media Capture activity, tap **Take Clinical Image**.
2. Use the camera on your device to take a picture.
3. Tap **Use Photo**. The Media Properties screen appears.
4. Select a document type, such as Annotation, and enter a description.
5. Tap **Save** and enter a comment and document type to save the media to the chart. You can review media captures in the Media Manager or the Chart Review activity in Hyperspace.

## Review Results

You can view the numerical and narrative results from a patient's lab, imaging, microbiology, and EKG procedures from the Results activity.

### Review results

After you open the patient's chart, tap **Results** to see a list of recent results for the patient. Tap a result to see details.

- For lab tests, a table of lab results appears. Swipe left to see past values for the same lab. You can tap  to see the report view.
- For imaging or EKG results, a narrative report appears.

### Review a patient's critical or abnormal results

An icon appears in the patient list for patients with any new results. These same icons appear in the Results activity.



	Abnormal result
	Critical result

## View a graph of results

Review discrete lab results in a graph by tapping or swiping up on the graph tab at the bottom of the screen.

Each result component appears on the graph in a unique color. To help you match the line color to a particular result component, a legend appears at the top of the graph.

## Focus on one type of result

Tap the colored circle on the left side of the screen that corresponds to that component's color. The line that represents that component appears brighter than the other lines. Slide your finger up and down in order to choose the component you want to bring to the front of the graph.



## Focus on one result value

Each white data point on the graph represents a specific result value for a component. Tap and hold near a data point to view more information about that value, including the actual result value, the reference range, the result date, and the result time.




## View and Create Notes and Letters

You can view and create notes and letters from Canto. The Notes activity shows you all of a patient's encounter notes in one location, so you don't need to open every encounter to view its related note. You can use the Notes Entry activity to create new documentation for a patient.

Tap **Notes** to see a list of encounter notes. From the list, tap a note you want to review. Tap the patient's name in the upper-left corner to return to the list.

### Use filters to narrow down the list of notes

To filter the notes you see in the activity, tap  and choose a filter category. For example, you might filter by note type and show only progress notes. Tap **Done** to apply the filters you've selected.

### Create a note or letter

Notes and letters you create are automatically associated with an encounter in the patient's chart. You can create new notes and letters or edit ones that you have pended.

1. In a patient's chart, tap **Notes Entry**.
2. Tap **New Note** to create a new note or letter. The encounter associated with the note appears in a gray banner beneath the patient header.
3. Enter text or tap the microphone button to use speech-to-text.





4. Tap the camera icon to add an image to your note. After you take the photo, you can tap **Annotate** to draw annotations on the image. Tap Save and enter a document type and description to insert the image and return to your note.
5. Tap to edit details of the note.
  - Tap **Note Type** and choose Progress Note, H&P, or Letter.
  - Tap **Time of Service** to change the time and date.
6. Tap **Sign at Close Enc.** or tap to pend or sign the note. Pended notes appear in the Notes Entry activity, where you can edit them later. Signed notes are filed to the chart.



You can tap from anywhere in a patient's chart to write quick handwritten notes. Jot notes appear the next time you log in to Hyperspace.

## E-Prescribe Medications

Use the E-Prescribing activity to order medications from Canto. Note that you can only order medications, not procedures. Tap **Write RX** to open E-Prescribing.



Although the E-Prescribing activity allows you to e-prescribe most outpatient medications, there are some limitations, especially for more complex medications, such as controlled medications. All of these limitations are by design to help ensure appropriate and safe use of the application to e-prescribe medications.

## Review medication information

Tap **Add Order** to begin prescribing a medication. A complete list of the patient's active medications appears, including medications that cannot be e-prescribed or called in. These medications are indicated with a red banner.

Inpatient medications from a patient's admission appear only in the patient summary. When a patient is admitted, you cannot e-prescribe medications for him.




Cancel		Select Medication	
Active Meds	Preference	Search	
Prescriptions			
		<b>atenolol (TENORMIN) 50 MG tablet</b>	>
		Take 1 tablet by mouth once daily for 360 days., Disp-30 tablet, R-11	
		<b>ketoprofen (ORUDIS) 50 MG capsule</b>	>
		Take 1 capsule by mouth 4 times daily as needed for Pain., Disp-30 capsule, R-3	
		<b>levothyroxine (SYNTHROID) 100 MCG tablet</b>	>
		Take 1 tablet by mouth once daily for 360 days., Disp-30 tablet, R-11	
		<b>simvastatin (ZOCOR) 20 MG tablet</b>	>
		Take 1 tablet by mouth once a day in the evening for 160 days., Disp-32 ta...	




## Write a prescription

1. Tap **Add Order**.
2. Select a medication from the **Active Meds** tab, or use the **Preference** or **Search** tabs to find a medication. The Edit screen appears.
3. On the Edit screen, enter details for the prescription.
4. Tap **Done**. The order appears in the E-Prescribing activity.
5. Optionally, at the bottom of the screen, tap:
  - The pharmacy name to select a different pharmacy.
  - The plan name to verify the patient's coverage information.
6. Tap **Sign**.
7. If medication alerts appear, enter override reasons for individual alerts or one override reason for all alerts. For some alerts, you must go back and make changes to complete the order in Canto.
8. Tap **Accept**. The order summary screen appears.
9. For call-in orders, tap the circle next to the medication to indicate that you have called it in.
10. Enter your password and tap **Sign**.

The following icons appear next to medications in the preference list and search features:

	Medications that must be called in
	Medications that the system has added to your preference list
	Medications you have added to your preference list

 Use Hyperspace to manage your preference list.

## Record a Dictation

You can dictate progress notes and letters in Canto. When you send the dictation, an In Basket message is sent to alert the transcription pool that a dictation is ready to be transcribed.

When the transcription is ready for your review, you receive an In Basket message to approve in Hyperspace.

### Record a new dictation

1. From the patient's chart, tap  to open the dictation popup.



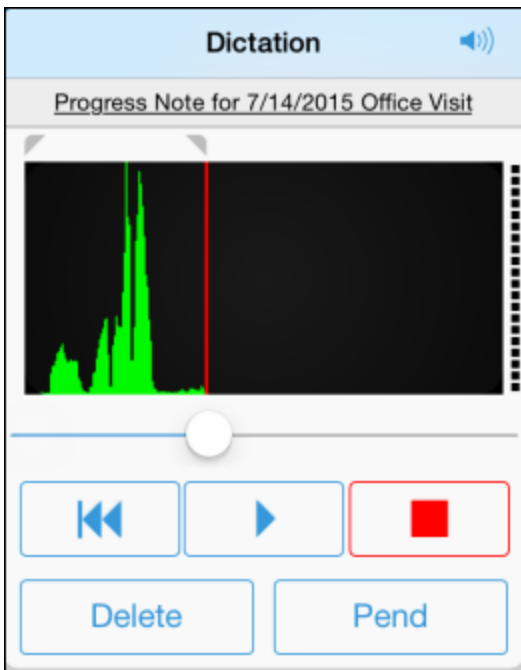
2. Tap the red record button to start a dictation. A graph indicates the volume of your voice as you record.
3. Tap the Progress Note or Letter link in the popup to choose whether the dictation is filed as a Progress Note or Letter.
4. While recording a dictation, tap the screen to close the dictation popup and access other activities. While you remain in the patient's chart, the recording continues.
  - Tap to pause the recording.
  - Tap to return to the dictation popup.
5. In the popup, you can also tap **Pend** to pause the recording. Pended dictations are saved on your device until you send them to transcription.
6. To delete a dictation from your device, tap **Delete**.



You can also tap to choose between creating a dictation for transcription and creating a note using speech recognition software. (Your organization must have a separate license to use speech recognition). Select **Dictation with Transcription** to dictate a note or letter for transcription.




If you leave the chart while recording, the dictation pauses. When you return, you can continue your dictation where you left off.






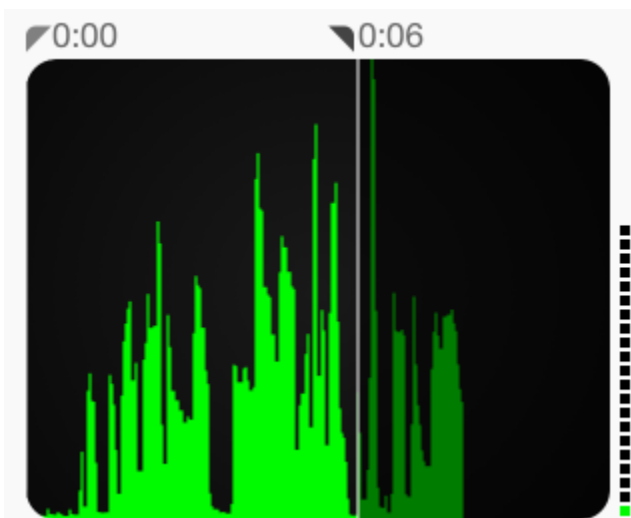
## Open pended dictations

To resume recording a pended dictation, tap the name of the note you want to open on the dashboard. Or, from within a patient's chart, tap .

## Edit a dictation

If you are interrupted while recording a dictation or want to re-record some information, you can edit the dictation.

1. Open the dictation you want to edit.
2. Tap and hold one of the  icons in the upper corners of the recording.
3. Slide the line to the section you want to trim. The section to be removed appears dark green.
4. Tap **Trim** to remove the dark green section from the recording.

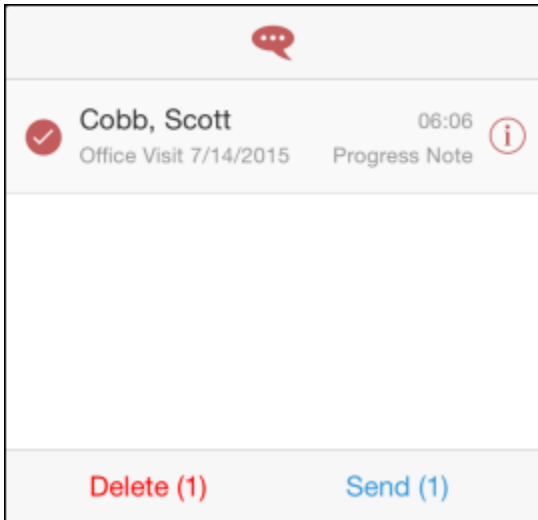


Note that you cannot edit filed dictations.

## File or delete a dictation

From the dashboard, you can select the currently pended dictations that you want to send to transcription or delete. Note that you must be connected to the Internet to file a dictation.

1. Select the radio button next to any dictations you want to delete or send.
2. Tap **Delete** or **Send**. You can also tap **Delete** or **Send** without selecting individual dictations to delete or send all pended dictations.



## Document Professional Charges

In the Charge Capture activity, you can quickly document professional charges while making your rounds.

### Capture charges

1. Tap **Charges** to access the Charge Capture activity.
2. Select a charge date from the calendar.
3. Tap **New Charge**.
4. In the Procedure pane, select a charge and any associated modifiers. By default, E/M is selected, and the charges available in the list are E/M charges. To select a different type of charge, tap **Recent** or **Search**. You can then search for the procedure you want.
5. Select a duration or level.
6. In the Diagnoses pane, add associated diagnoses. You can select a diagnosis from the patient's problem list, a list of recently used diagnoses, or a database search that includes your preference list. As you select diagnoses, the diagnoses you've chosen appear with a circle icon. The primary diagnosis appears with a blue diamond.
7. In the Other Information pane, add any relevant details such as place of service, referring provider, or comments. Most values are automatically filled in, but you can update them as appropriate.
8. Tap:
  - **Pend** the charge. It appears in the Charge Capture activity, and you can document additional charges before filing.
  - **File Charges** to file the current charge and any pending charges for the patient.