

EPIC TRAINING



Haiku Quick Start Guide

HOUSTON
Methodist[®]
LEADING MEDICINE





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Getting Started

Welcome to Haiku, Epic's mobile app.



Log in

1. On your device, tap .
2. Enter your user ID and password in the login fields.



If you forget your Epic user ID or password, <call the Help Desk and ask for the Security team.>

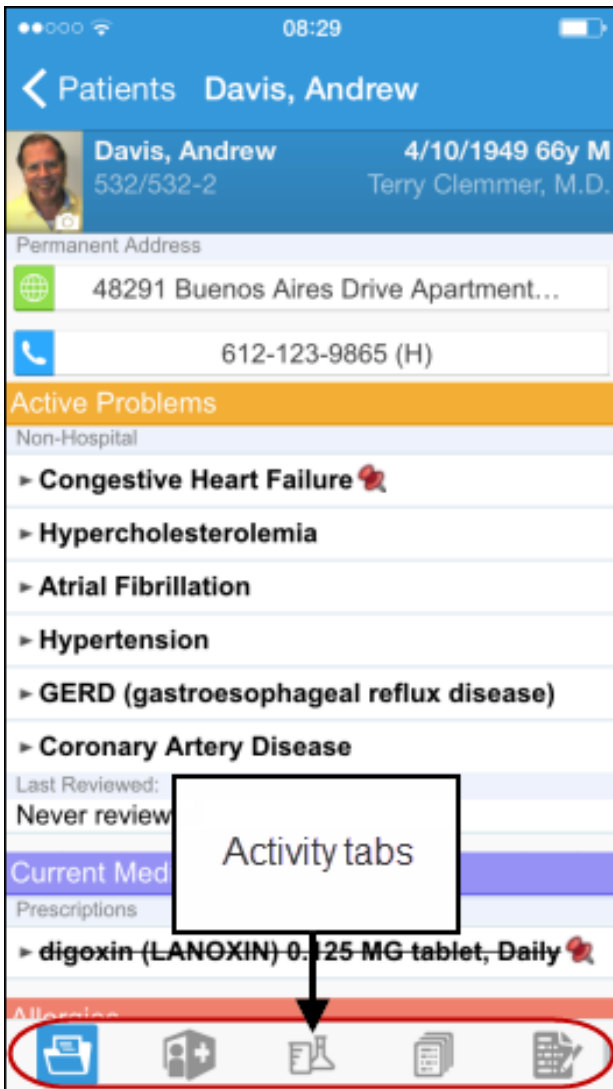


Tap and hold an item on the screen to see a tooltip with more information on patients, appointments, In Basket messages, and more.



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.




Tap and drag the activity bar at the bottom of the screen to the left to see more activities.

Log out

When you leave Haiku, the app continues to run in the background. For security reasons, Haiku automatically logs you out after 20 minutes of inactivity. However, you can also manually log out.







1. Tap  and then **Options**.
2. Tap **Logout**.


Find Your Patients

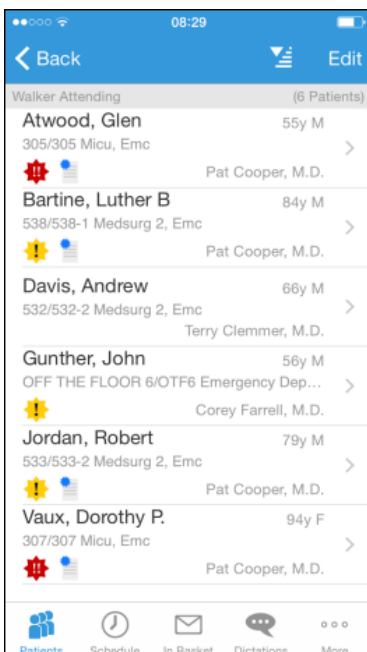
You can find hospital, clinic, and surgery patients in Haiku. The tool you use to find the patient depends on where the patient is located, as described in the following topics. After you find the patient, tap the patient's name to open the chart.

Find admitted patients

Tap  to open your default patient list or all patient list folders if you don't have a default list. With a default list, you don't have to pick one from your folder each time you open the activity. You can set up a default list back in Hyperspace by right-clicking the list and clicking Default List. You can tap **Back** to open a different patient list. 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 the **+** button, search for a patient, and then select the patient. When you are finished editing the patient list, tap **Done**.



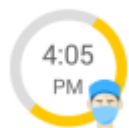
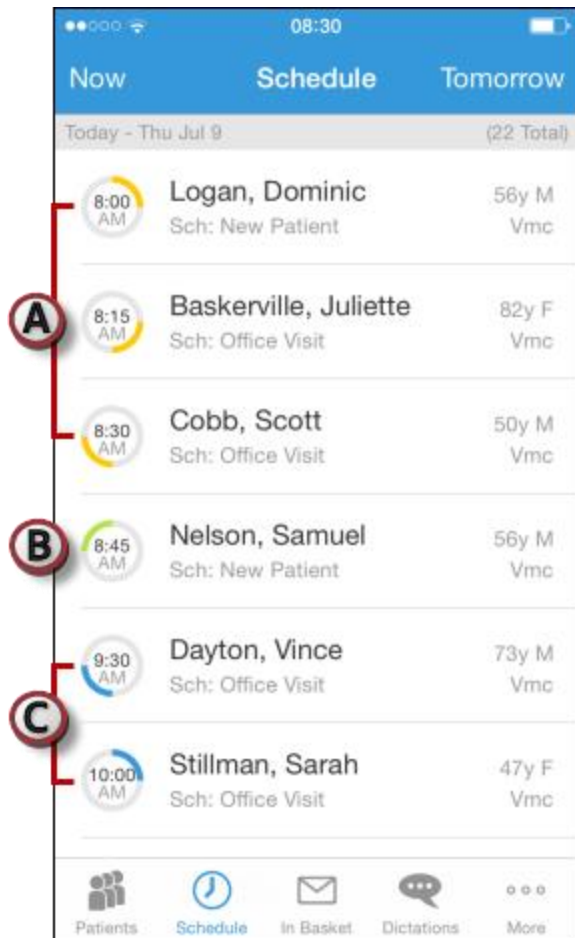


Find clinical appointments and surgical cases

Tap  to open your schedule. The schedule opens to the current day. In addition, you can also see tomorrow's 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





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.



	Cobb, Scott Sch: Office Visit	50y M Vmc
---	---	--------------

Find other patients

To find a patient who isn't on your patient list or schedule, tap  and **Search** to open the Patient Search activity. Then search as you normally do in Hyperspace, using the patient's name or MRN, and the results appear with more patient details, such as birth date and address. Tap  to sort results.

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

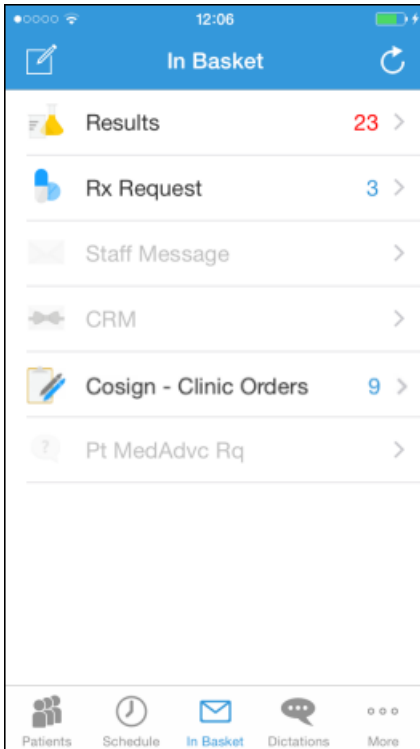
Manage In Basket Messages

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

- Results
- Rx Request
- Staff Message
- CRM (Customer Relationship Management)
- Cosign - Clinic Orders
- Pt Med Advc Rq (Patient Medical Advice Request)







You can also create new Staff Messages.

The In Basket folder appears with the number of unread messages. The number is 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 is 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 Haiku.

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 resultated. A number indicates the total number of resultated orders that you haven't yet reviewed.
	Not all orders for this patient have been resultated. A number indicates the total number of orders that have been resultated that you haven't yet reviewed.


Tap a result to open it.

Release results to MyChart

You can release results to patients through MyChart like you can in Hyperspace.


1. In a Results message, tap , and then tap **Rsit Release**.
2. Select the results you want to release.



3. To add a comment for the patient, tap  and type your comment.
4. On the Results Release screen, tap **Accept** to release the results to MyChart.



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.

Create a result note

From a Results message, you can send a result note to another clinician or file more information about a result as a QuickNote.

1. In a Results message, tap . For some messages, you might need to tap  and **Result Note**. The Result Note screen appears.
2. At the top of the screen, a box shows how many results are currently selected. Tap the box. The Select Orders screen appears.
3. Select one or more orders.
4. Tap **Result Note** to return to the Result Note screen.
5. Tap the middle box and enter a note for the result.
6. Tap **Route** and search for a recipient. Select one or more recipients.
7. Tap **Result Note** to return to the Result Note screen.
8. If you want to file your note as a QuickNote, select the radio button next to the **Also File as Quick Note** option.
9. Tap **Send** to send the note. If you selected the QuickNote option, the note is also filed as a QuickNote.

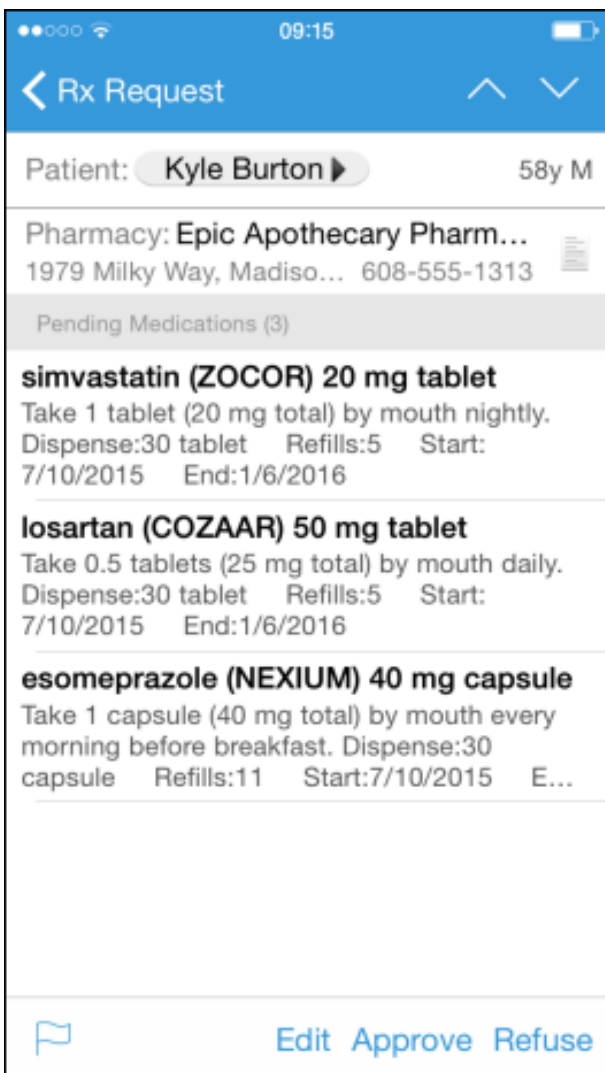
Refill prescriptions

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**.

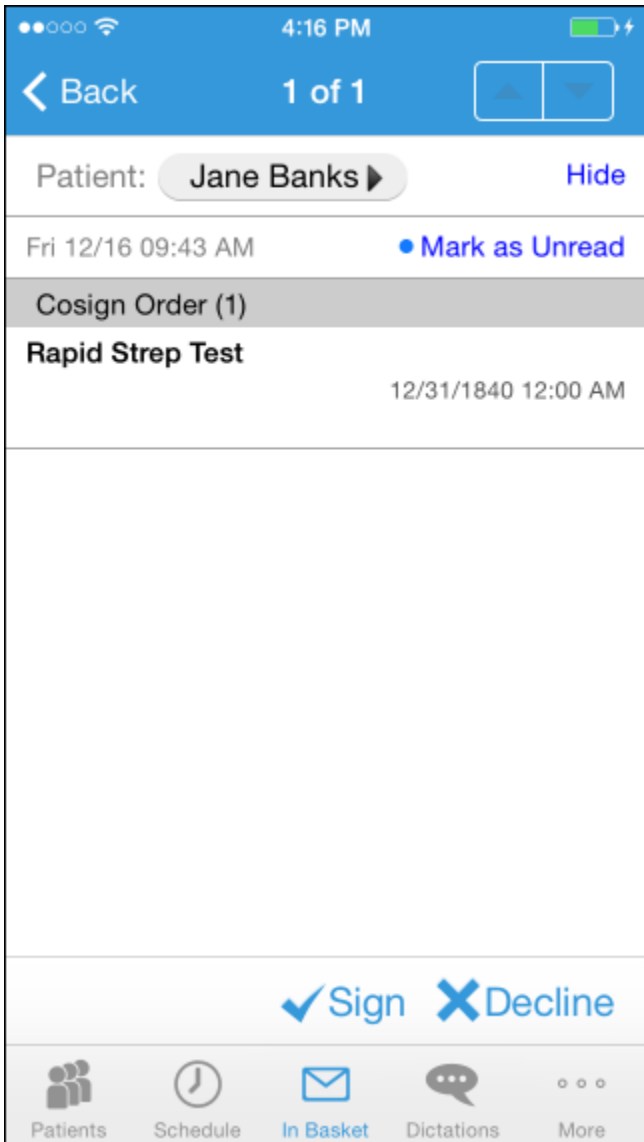




Cosign clinic orders

You can cosign orders through Cosign - Clinic Orders In Basket messages.






1. In a Cosign - Clinic Orders message, tap an order to review the order details.
 - If you need to review the full chart, tap the patient's name.
2. Act on the request to complete the message and remove it from your In Basket:
 - Tap **Sign** to cosign the orders.
 - Tap **Decline** to decline to provide your cosignature.
 - Tap  to sign or decline individual orders in a single message.

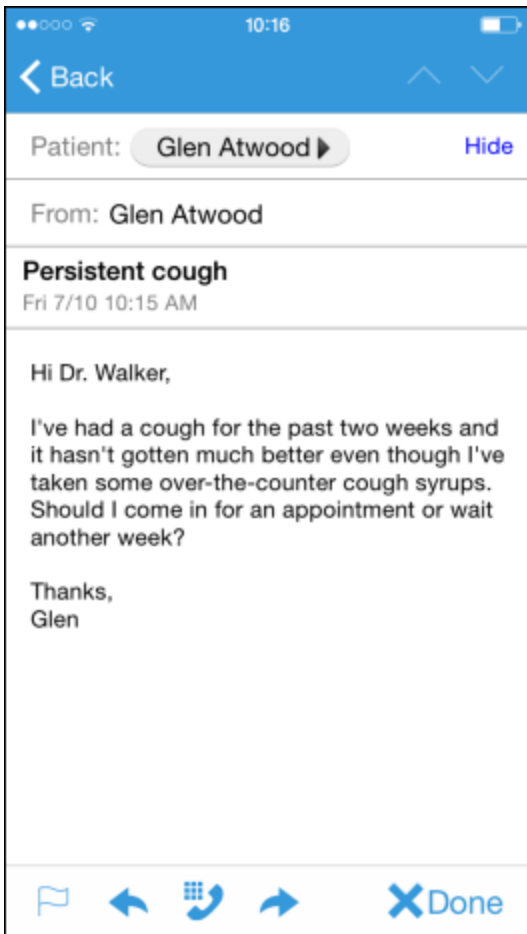




Respond to patient advice requests

You can respond to patient requests for medical advice through Patient Medical Advice Request (Pt MedAdv Rq) messages.

1. In a Patient Medical Advice Request 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  to call the patient.
 - Tap  **Done** to remove the message from your In Basket.
 - Tap  to mark the message as New or defer it to read later.







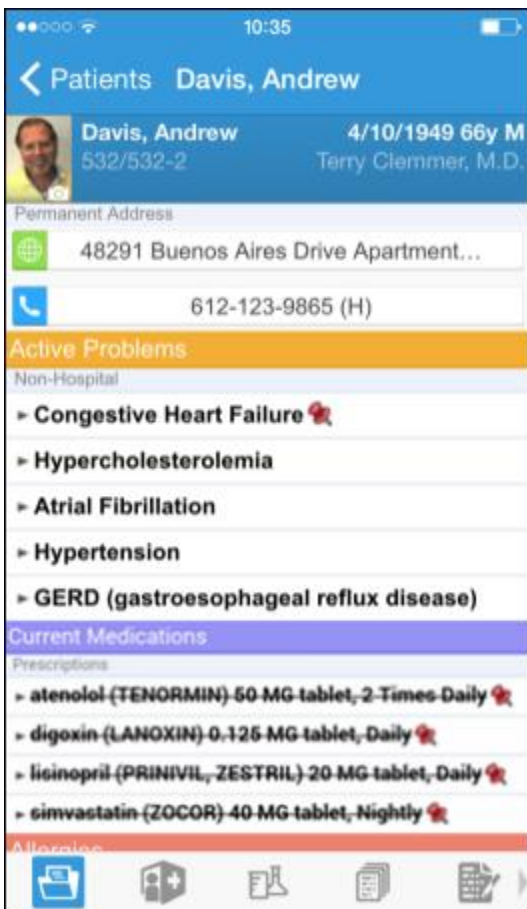


Review Patient Information

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 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

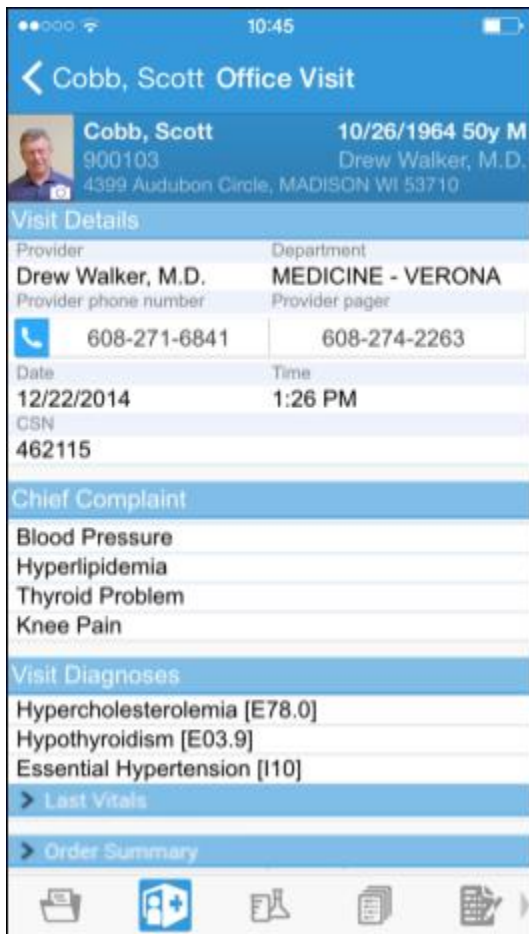




Review past encounters


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  to open the CE Reports activity.

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



AT&T 1:54 PM 98%

< Patients Bjørnsen, Julie

Bjørnsen, Julie 2/10/1963 51y F
 82919067 Drew Walker, M.D.
 4399 Audubon Circle, MADISON WI 53710

Summaries >

Documents >

Bottom navigation icons: Home, Add, Messages, Print, Share

10:46

< Back University Medical Center

Cobb, Scott 10/26/1964 50y M
 900103 Drew Walker, M.D.
 4399 Audubon Circle, MADISON WI 53710

Epic Clinical Summary - Cobb, Scott (42 y.o. Male)

Patient Demographics

Patient Address	Communication
9006 Cobb Grove Lane MADISON, WI 53717	Unknown

Prior Encounters

Date	Type	Specialty
02/10/2007	Office Visit	Pulmonology
01/13/2007	Consult	Pulmonology

Allergies

Allergen	Noted Date	Severity
PENICILLIN G	02/13/2007	High

Medications

Prescription	Sig.
ALBUTEROL 90 MCG/ACT IN AERS	Inhale 2 Puffs every four hours as needed for wheezing
TRIAMCINOLONE ACETONIDE(NASAL) 55	Spray 2 Spray each nostril twice a day every twelve hours.

Bottom navigation icons: Home, Add, Messages, Print, Share



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.

Mark information as reviewed

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

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

Allergies	
▼ Penicillins	
Noted	Severity
4/10/2015	Medium
Reactions	Reaction Type
• Hives	Intolerance
Comments	
Itching across the entire body	
► Sulfa Antibiotics	
Reviewed by You at 10:48 AM ✔ Mark as Reviewed	

Capture Patient Photos and Media

You can update patient demographic photos and capture clinical images from the patient's chart.

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  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.

	1d ago	3yr ago	3yr ago
CHOL	168	175	194
HDL	45	50	41
LDL	98	95	
Tricy...	150	160	160



Tap and hold on a result to see the reference range for that component:



HDL
7/9/2015 1:42 PM
45
Units: mg/dl
Ref Range: 40 - 60 mg/dl ago 3yr
Spec Type: Serum-blood
Rslt Agency: WEST SIDE INTERNAL LAB

HDL	45	50	41
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Review a patient's critical or abnormal results

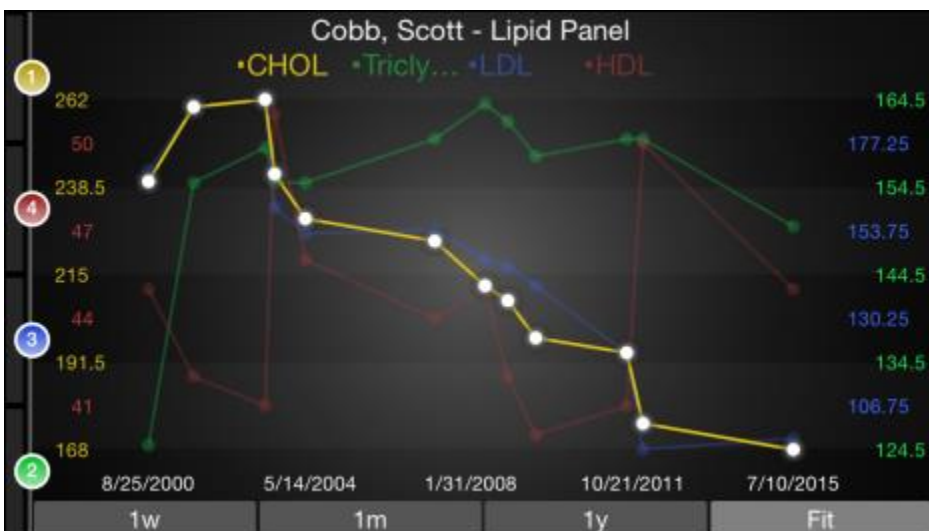
An icon appears in the patient list for patients with any new results. These same icons appear in the Results activity.

	Abnormal result
	Critical result

View a graph of results

Review discrete lab results in a graph. While reviewing a table in the Results activity, turn your device horizontally.

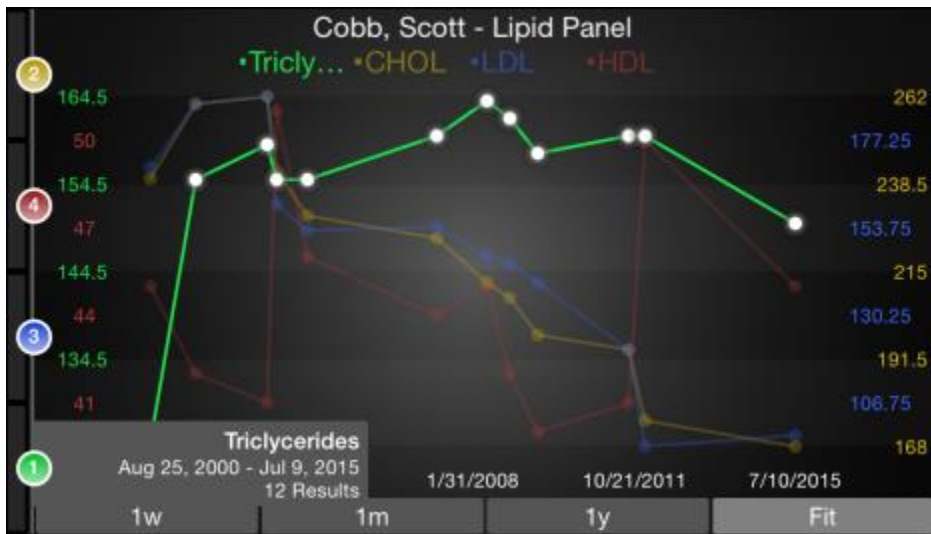
Each result component appears on the graph in a unique color. To help you match the line color to a particular result component, a key appears at the top of the graph.





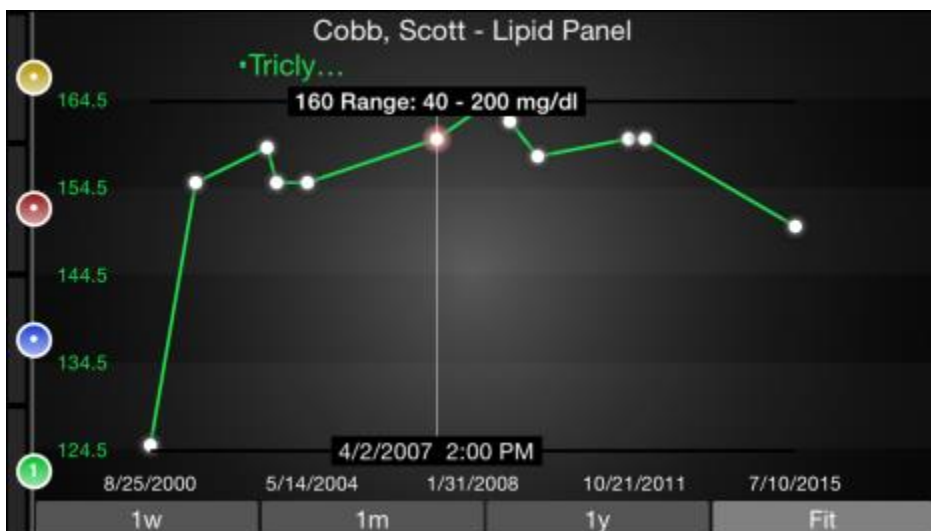
Focus on one type of result

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 Haiku. 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  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.

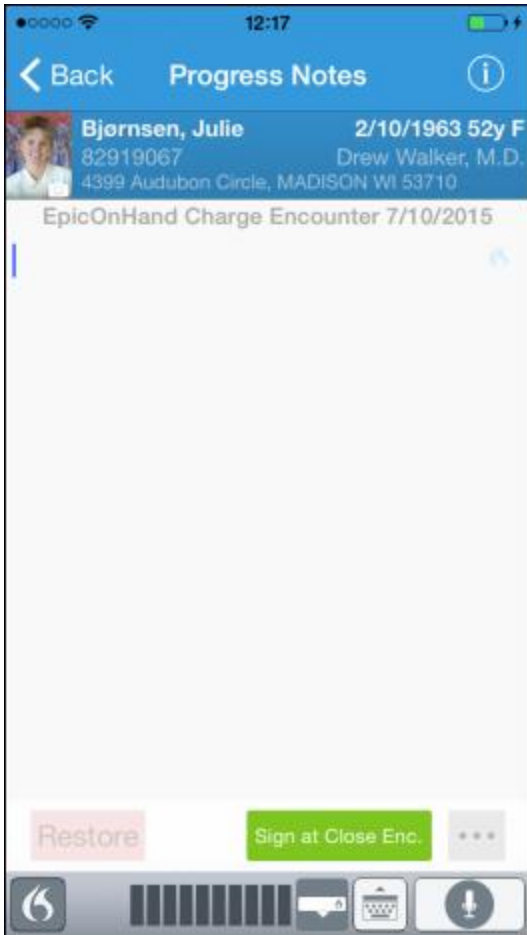
Use filters to narrow down the list of notes

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 new 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  to open the Notes Entry activity.
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  to edit the note's details.
 - Tap **Note Type** and choose Progress Note, H&P, or Letter.
 - Tap **Service** to change the service.
 - Tap **Time of Service** to change the time and date.
5. 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.



View Information in a Push Notification


You can view information such as critical and important results in notifications that appear automatically in the app.

Open an activity from a push notification

When you're already logged in to Haiku, you can open an activity directly from a notification. Simply tap the notification to open the In Basket activity and view the related message.

Review recent notifications


You can view all recent notifications in the Notifications activity.

1. Tap **More** at the bottom of the screen.
2. Tap  **Notifications** to open the Notifications activity.




Choose which push notifications appear

You can choose which types of push notifications appear in Haiku, or turn off push notifications entirely.

1. In the Notifications activity, tap  to open the User Preferences screen.
2. To turn off a certain type of notification, slide the button next to that notification type to the left. For example, to turn off push notifications for staff messages, slide the button next to "Staff messages" to the left.
3. To turn off all push notifications, slide the button next to "Push notifications" to the left. This setting overrides any individual notification settings. For example, in the screenshot below, no push notifications will appear even though Results type notifications are turned on.


E-Prescribe Medications

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

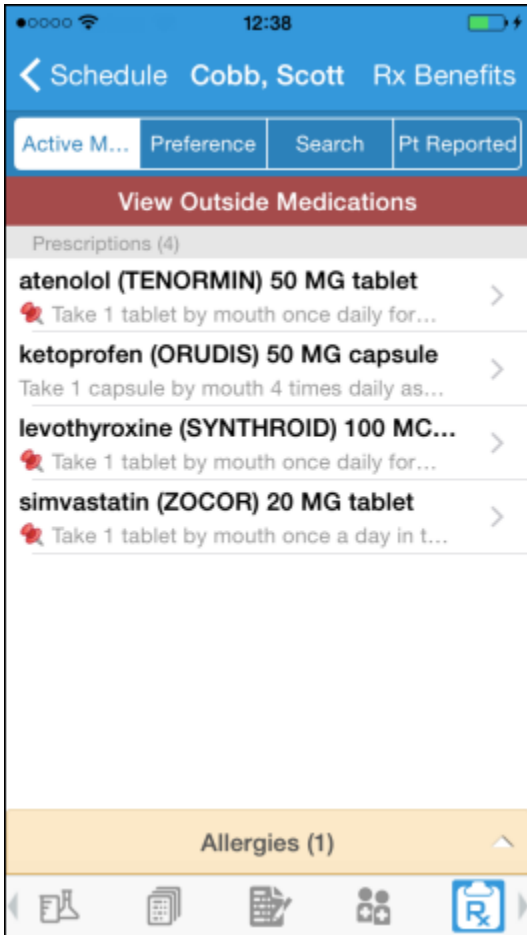


Although the E-Prescribing activity allows you to e-prescribe most outpatient medications, there are some limitations, especially for more complex medications, such as controlled medications. All of these limitations are by design to help ensure appropriate and safe use of the application to e-prescribe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

Review medication information

The **Active Meds** tab displays an accurate and complete list of the patient's current prescriptions, including medications that cannot be e-prescribed or called in (indicated with .

- Tap or swipe up on the allergies information bar to review the patient's allergies.
- This list doesn't contain Inpatient medications. They appear only in the patient summary.



Document a patient-reported medication



The **Pt Reported** tab allows you to add patient-reported medications to the patient's list of active medications. On the Pt Reported tab, search for a medication, enter details about it, and tap **Add**.

Search for a medication

The **Preference** and **Search** tabs allow you to look for medications that can be e-prescribed or called in with Haiku.

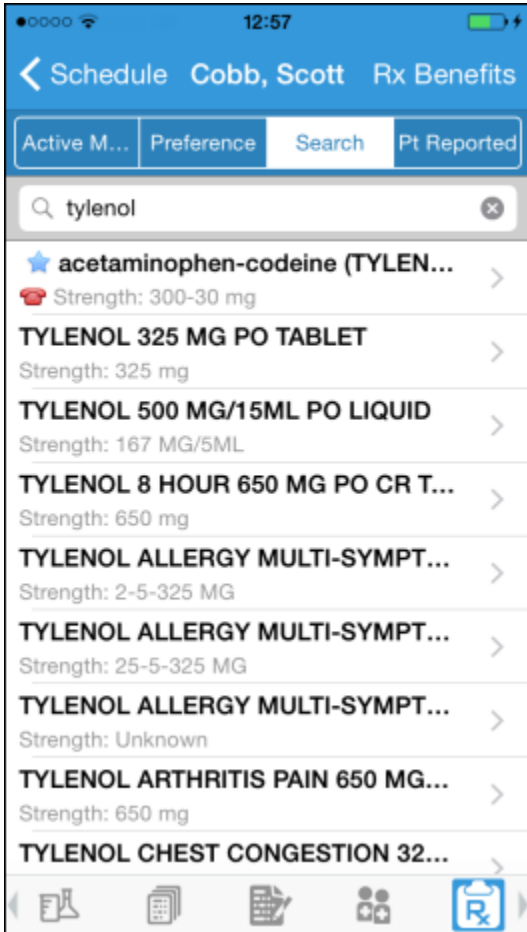
If the medication you want isn't in your preference list, tap the **Search** tab and enter at least three characters to begin searching. Medications included in Haiku and your other preference lists are elevated in the search results.

The following icons appear on both tabs:

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



Medications you have added to your preference list



When a patient is admitted, the **Preference** and **Search** tabs become inactive, and you cannot e-prescribe medications for the patient.



Use [Hyperspace](#) to manage your preference list.

Write a prescription

You can write a prescription from your device.

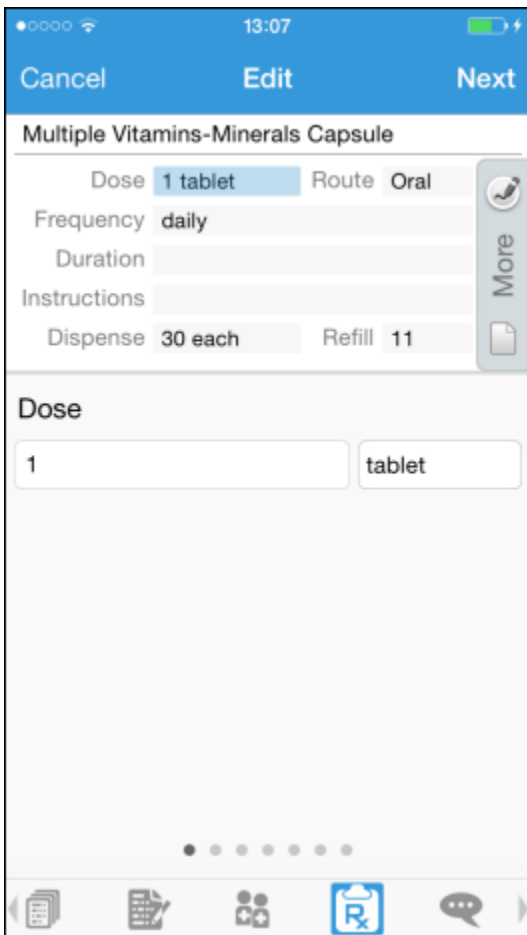
1. On the **Active Meds** tab, review any current prescriptions or facility-administered medications and tap or drag the allergies information bar to review allergy information.
2. Optionally, tap **Rx Benefits** to verify the patient's benefit information.
3. Tap **Preference** to use the Preference tab to find a medication. You can also search for a medication using the **Search** tab.
4. Select a medication. The Edit screen appears.



5. Tap to select individual fields or swipe across the bottom half of the screen to move through the fields.
6. Optionally, tap **More** to turn on Dispense as Written or enter notes for the pharmacy.
7. When you are finished filling out the medication details, tap **Next**.
8. Alerts might appear.
 - If necessary, you can bypass yellow alerts by tapping **Override** or **Accept**.
 - You must go back and make changes to address red alerts.
9. The Summary screen appears. If necessary, tap the pharmacy at the bottom of the screen to edit it.
10. Tap **Sign**.
11. If required, enter your password and tap **Done**.



For call-in medications, follow the steps above until you get to the Summary screen. Then, call in the medication and tap **Called In**. The Active Meds tab appears and now includes the medication you called in.






Record a Dictation

Haiku provides a dictation activity for you to record and file dictations to your server, from which they can later be transcribed. The note is then entered in the patient's chart for you to read in Haiku or Hyperspace. If you have an iPhone or fourth generation or later iPod touch, you can use the built-in microphone to record your dictation. If you have an older generation iPod touch, you must obtain a microphone headset to use this feature.

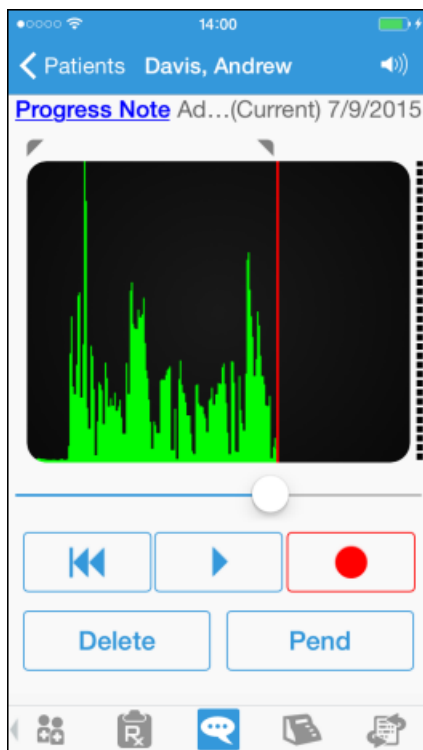
Record a new dictation

From the patient's chart, tap .

1. Start a new dictation by tapping the red record button. A graph indicates the volume of your voice as you record.
2. Tap **Pend** to save the dictation.
 - Tap **OK** to return to the recording screen in the patient's chart.
 - Tap **Manage** to go to the Dictations activity.





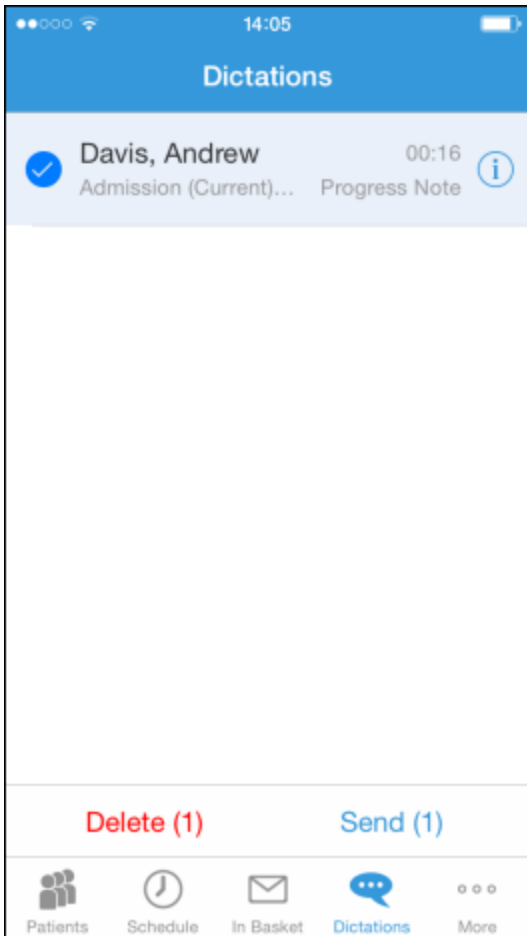
If you access another activity while recording, the dictation pauses. When you return to the recording screen, you can continue your dictation where you left off.





Open pending dictations


1. From the home screen, tap . (You might need to tap  to see this button.) The Dictations activity opens.
2. Tap the dictation you want to open.

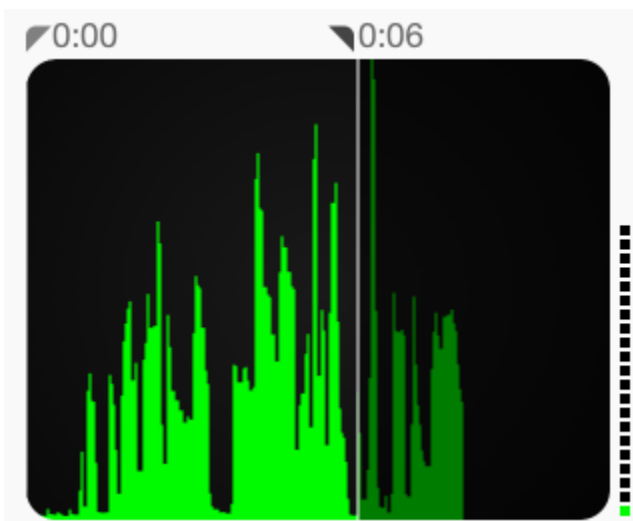




Edit a dictation

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

In the Dictations activity, 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**. Alternatively, tap **Send All** to send all pended dictations. The word **Sent** appears beside a dictation when it has been successfully filed.

Document Professional Charges

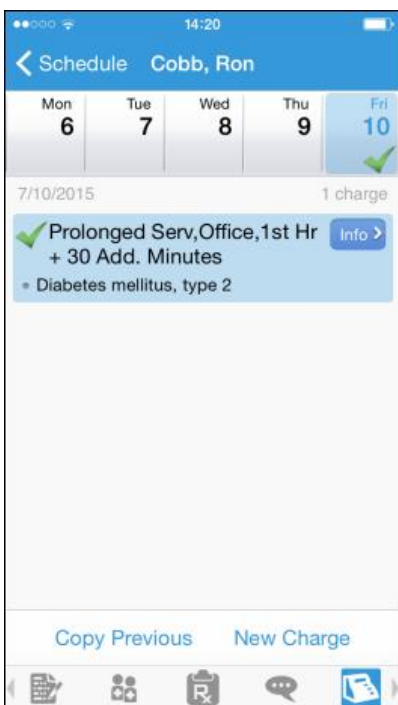
In the Charge Capture activity, you can quickly document professional charges while making your rounds.

File a new charge

1. In a patient's chart, tap  to open the charge calendar.



2. Select a date for which to file charges.
3. Tap **New Charge**.
4. On the Procedure screen, select a charge and any associated modifiers. When you're done, tap **Next**.
 - E/M charges appear automatically. To select a different type of charge, tap **Other**. You can then search for the procedure you want.
5. On the Diagnoses screen, 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, a tab appears to show you the diagnoses you've chosen. The primary diagnosis has a small blue diamond next to it.
6. When you've added all relevant diagnoses, tap **Next**.
7. On the Additional screen, add relevant details like the charge's bill area, referring provider, or comments. Most values are automatically filled in, but you can update them if you need to.
8. When you're finished adding details, tap **Review**.
9. On the Summary page, review the charges you've entered. Tap **Edit** to modify any details about a charge.
 - If a Warnings button appears, tap it to see issues with the charges you've entered.
10. Tap **File** to file the charges.





At any point during charge entry for a new charge, you can tap **Pend** to pend the charge you're working on. To return to it, access the calendar view and tap **Edit** in the charge you want to modify.

Copy a charge

You can copy a charge in Haiku.

1. In a patient's chart, tap to open the charge calendar.
2. Select a date for which to file charges.
3. Tap **Copy Previous**. The Copy Charge screen opens.
4. Select a charge from the list.
5. If you need to make small changes, you can do so from the Summary screen.
6. Tap **File** to file the charge.

Review past charges


If the selected patient has past charges in the system, the calendar shows one of the following icons on the date the charge was entered:

	Indicates a pended charge entered by you
	Indicates a completed charge entered by you
	Indicates a charge entered by another provider
	Green line indicates the patient was admitted on that day



If more than one of a particular type of charge exists on a given day, the number of charges appears above the icon.



Contact Care Team Members

You might need to follow up with a prescribing physician about a medication the patient is taking or to discuss some recent results. Tap  to see other providers who work with the patient.

Contact previous care team members

1. Tap  to place a call to the care team member directly from your iPhone. (The phone also appears if you are using an iPod touch, but the button is not active.)
2. Tap  to open a map of the care team member's clinic location.



Note that your phone number will appear on calls you make from your iPhone. The application cannot mask your number.