EPIC TRAINING

Telepsychiatry Admission Workflow for Amwell and SOC Providers

HOUSTON Methodist® LEADING MEDICINE

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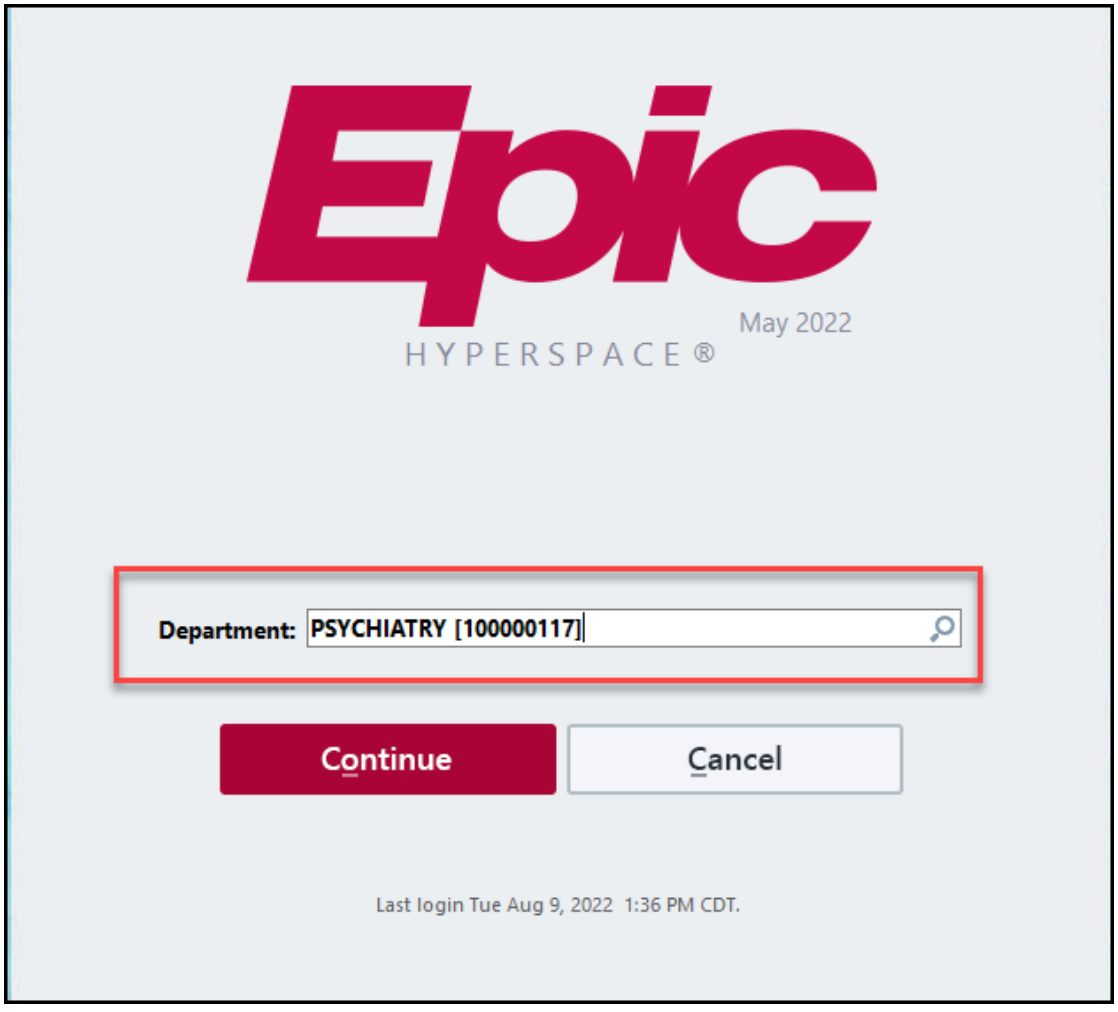
Audience: Amwell and SOC Providers

Login Department

After logging into Epic with your Houston Methodist credentials, a screen will appear for you to select the designated department. In the **Department** drop-down field, enter **Psychiatry**, as shown below.



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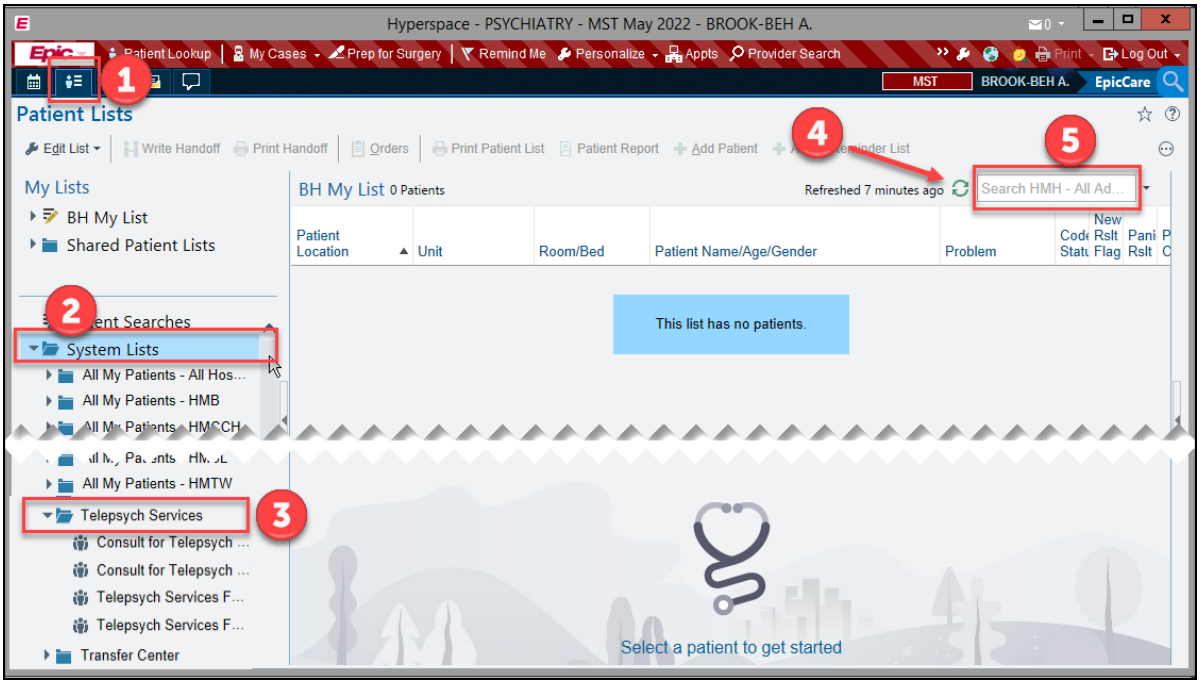
Locating Patients

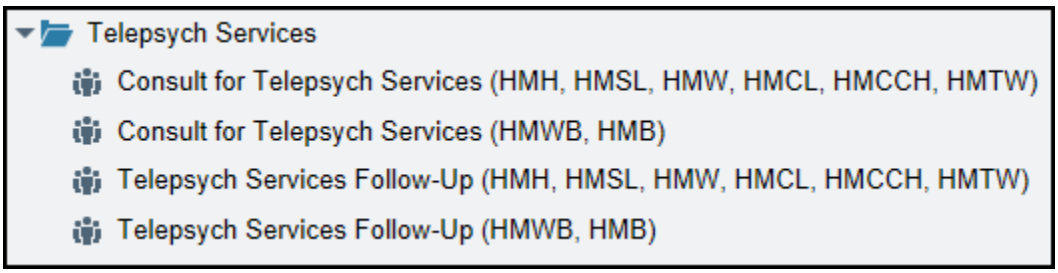
Once logged into Epic:

1. Navigate to the **Patient List** activity (the top-left side of your screen).
2. Expand **System Lists** folder.
3. Locate and expand **Telepsych Services** folder.
4. Click here to refresh list.
5. Use **Patient list** search to find patients not on the consult list.



Accessing Patients on the System List

These lists will display patients who have a consult or follow-up order for telepsych services, sorted by facility.



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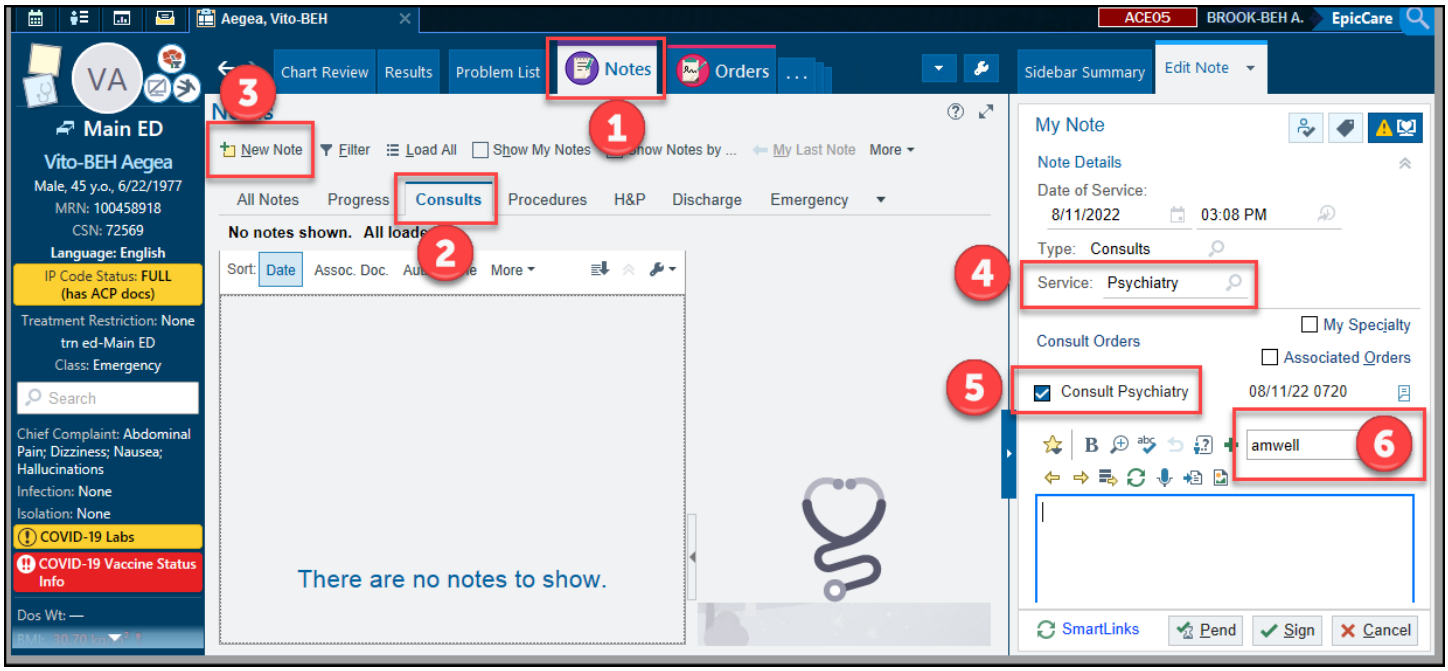
Writing a Consult Note

Starting a New Note

Open the patient's chart by double clicking the patient's name, on the **Patient List**.

1. Locate the **Notes** tab inside the patient's chart.
2. Select **Consult** tab.
3. Click **New Note**.
4. For **Service**, enter **Psychiatry**.
5. Link note to consult order by clicking the **checkbox** next to **Consult Psychiatry**.
6. Type **Amwell** or **SOC** in the **Insert SmartText** box to utilize the template.



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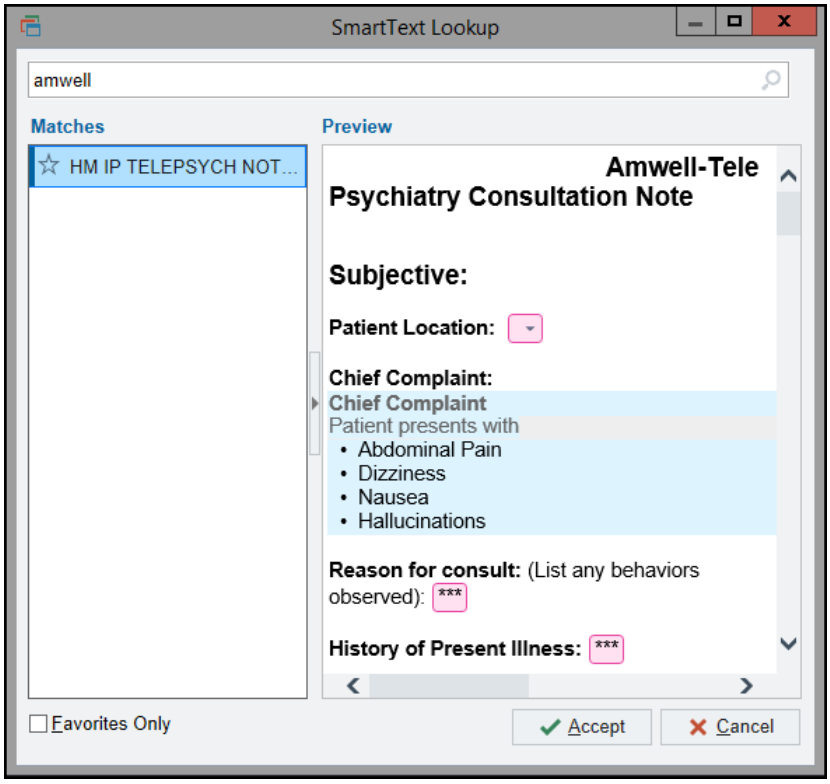
Accessing the Consult Note Template

The **SmartText Lookup** window will appear. The note template will be highlighted, click **Accept**. The note will be displayed for your completion.



Completing the Consult Note Template

SmartLists and Wildcards

Once the note has been selected, you can navigate the note by using your **F2** key on your keyboard or choose **Next Field** from the right-click menu. You must complete all the **SmartLists** and **wildcards** *** before you can sign the note. Once you've made your selection in the **SmartLists** drop-down, press enter, and the template will take you to the next field. **Wildcards** are free-text fields. Once you complete the free-text fields, you can go to the next item by pressing **F2**.

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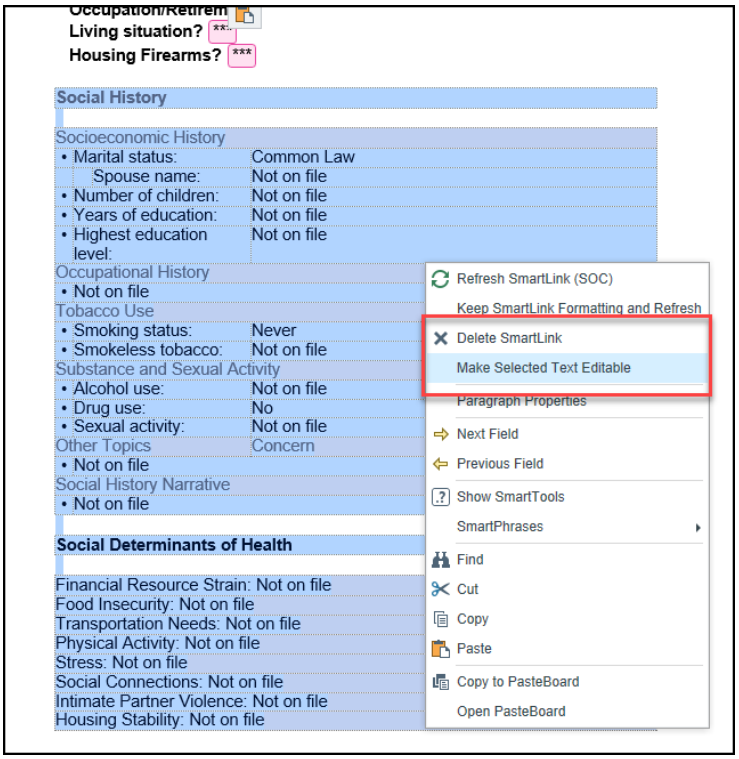
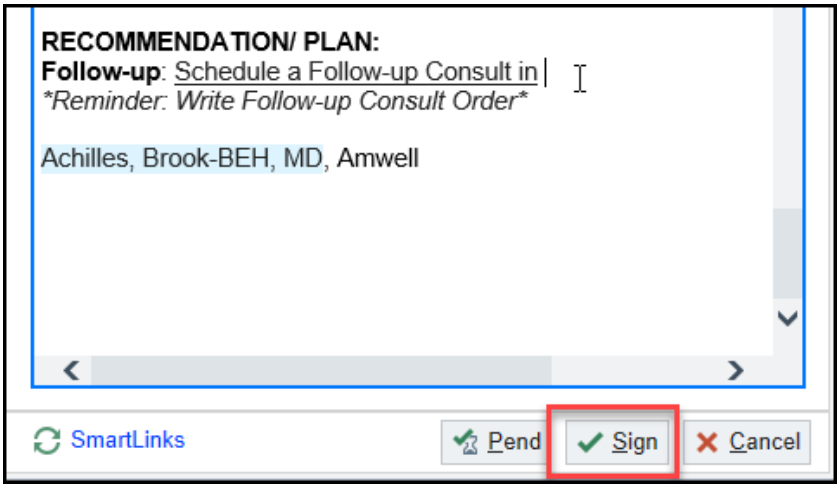
SmartLinks

Parts of the note template consist of **SmartLinks** which are displayed as information highlighted in blue. They'll auto-populate from what has been entered in the patient's chart. If the information isn't found in the patient's chart, it will display "not on file" or the field will be blank. The tables can be edited by right-clicking on them and selecting **Make Selected Text Editable**. If the table needs to be deleted, you can select **Delete SmartLink**.



Sign the Consult Note

Once all documentation has been completed, click **Sign** in the bottom-right corner.



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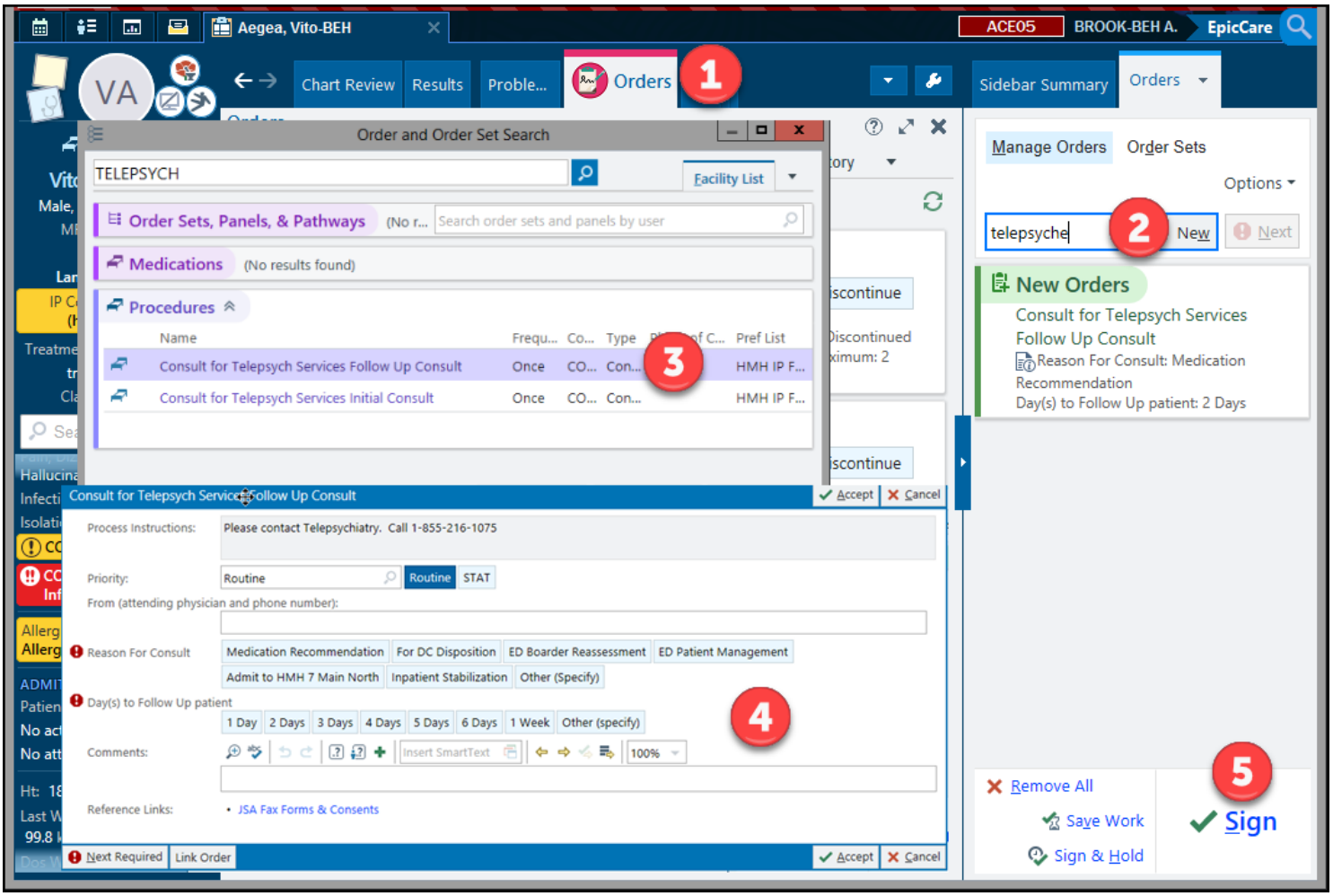
Placing an Order

Placing a Follow-Up Consult Order

1. Navigate to the **Orders** tab.
2. Enter **Telepsych** in the **Place orders field**.
3. Double-click **Consult for Telepsych Services Follow Up Consult**.
4. The **Consult for Telepsych Services Follow Up Consult** order will open. Complete the required fields and then click **Accept**.
5. Click the **Sign** button in the bottom-right corner.



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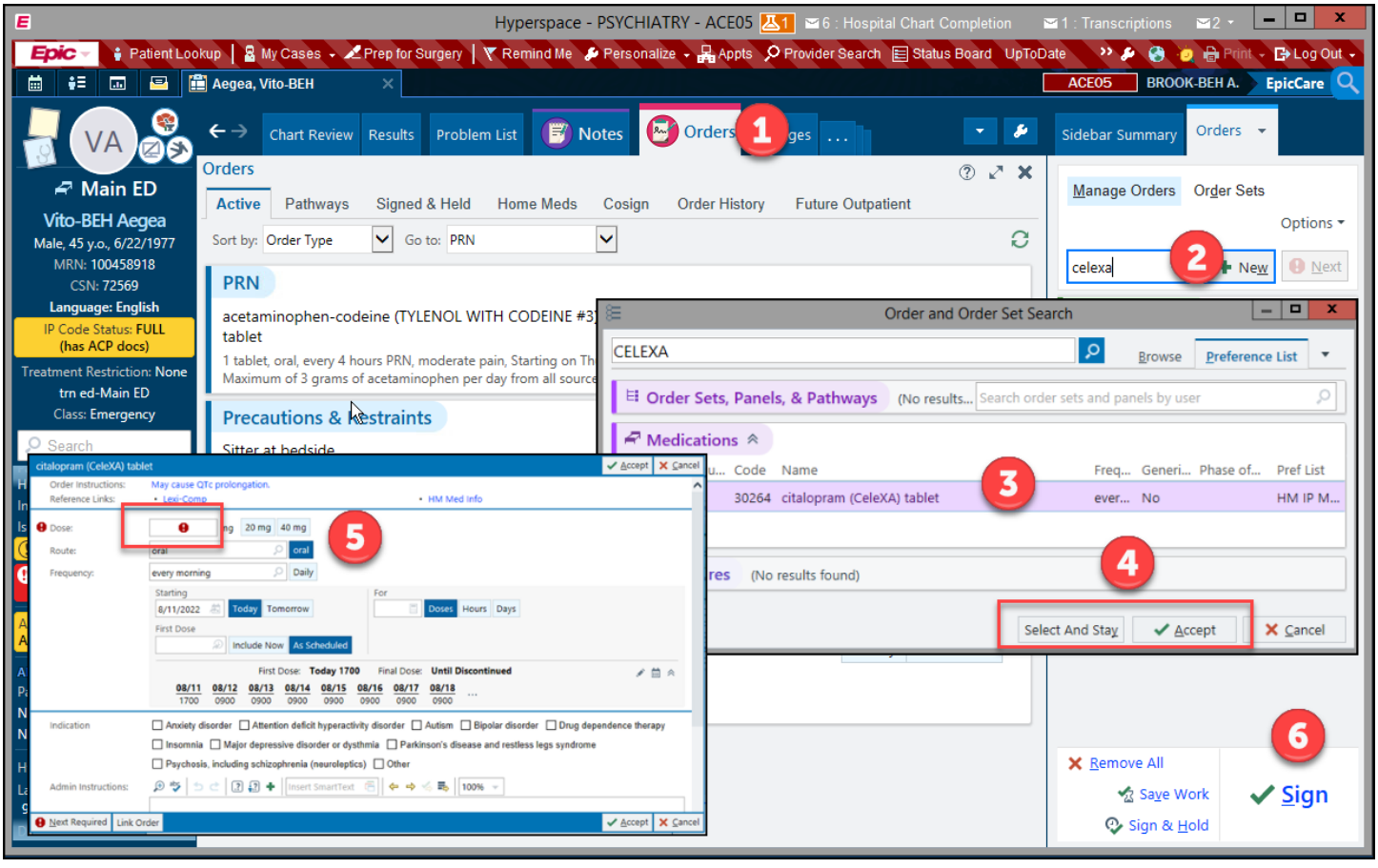
Placing a Medication Order

1. Navigate to the **Orders** tab.
2. Enter desired medication in the **Place orders field** then hit enter.
3. Select desired medication on the **Order and Order Set** pop-up and click **Accept**.
4. When entering multiple orders, use **Select and Stay**.
5. Complete the required fields and then click **Accept**.
6. Click the **Sign** button in the bottom-right corner.



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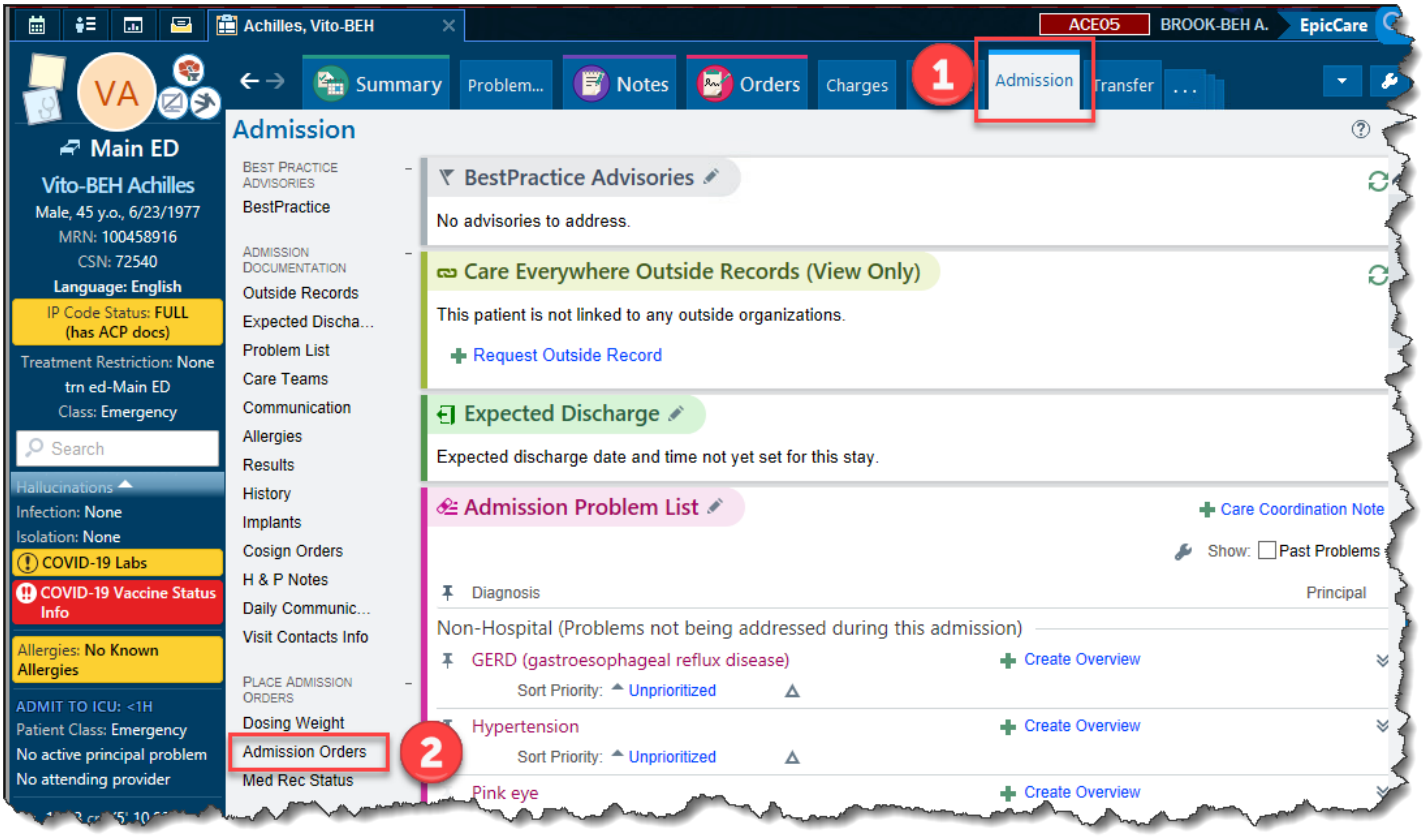
Placing Admission Orders

Patients admitted to the Houston Methodist Medical Center location will be Main 7 North. It's the process of comparing a patient's current orders with the new orders you're writing, using the **Admission** navigator.

1. Navigate to the **Admission** navigator.
2. Click **Admission Orders**.



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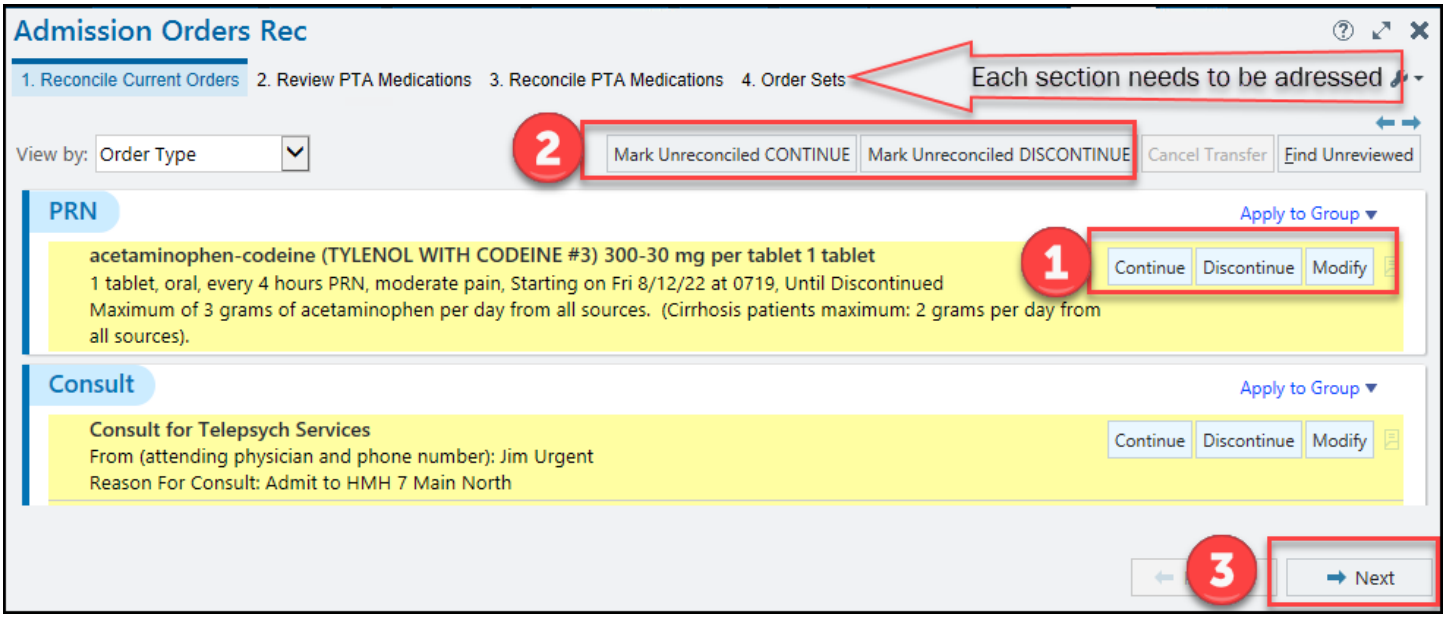
There are four steps involved in admission reconciliation. All sections are required.

1. **Reconcile Current Orders**
2. **Review PTA** (Prior to Admission) **Medications**
3. **Reconcile PTA Medications**
4. **Order Sets**

Reconcile Current Orders

This section is a review of current, active orders placed while in the ED. Items that need to be addressed are highlighted in yellow.

1. The provider can choose to continue, discontinue or modify each order.
2. The buttons Mark Unreconciled CONTINUE | Mark Unreconciled DISCONTINUE will mark any order not individually addressed as either **Continue** or **Discontinue**.
3. Click **Next** when ready to advance.



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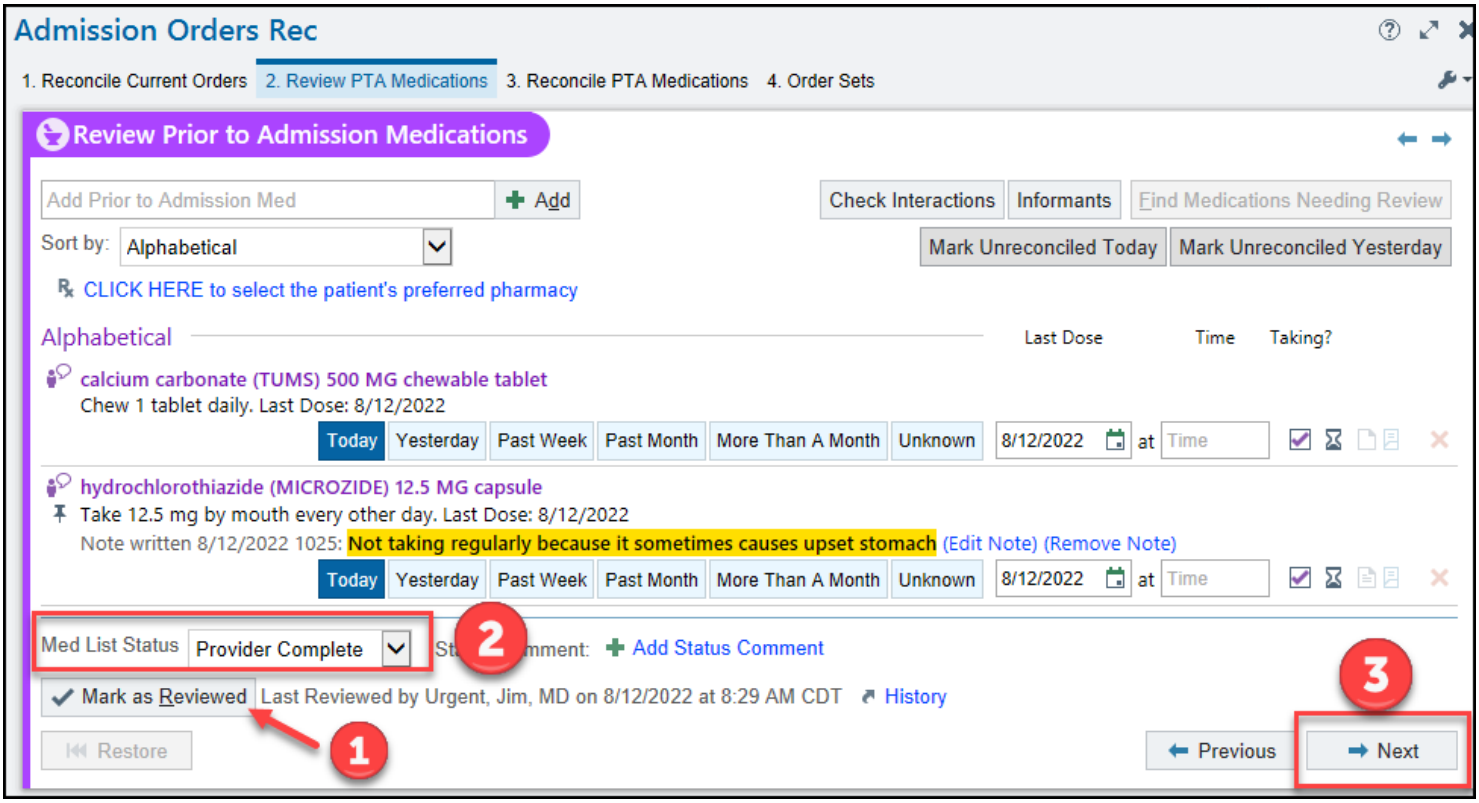
Review PTA Medications

You're expected to review PTA medications, to assist with ordering or assess potential medication interactions. Once done:

1. Click the **Marked as Reviewed** button. If no data exists, still mark reviewed.
2. Current review status is displayed here. It details who was last to review the list with the patient.
3. Click **Next** to advance.



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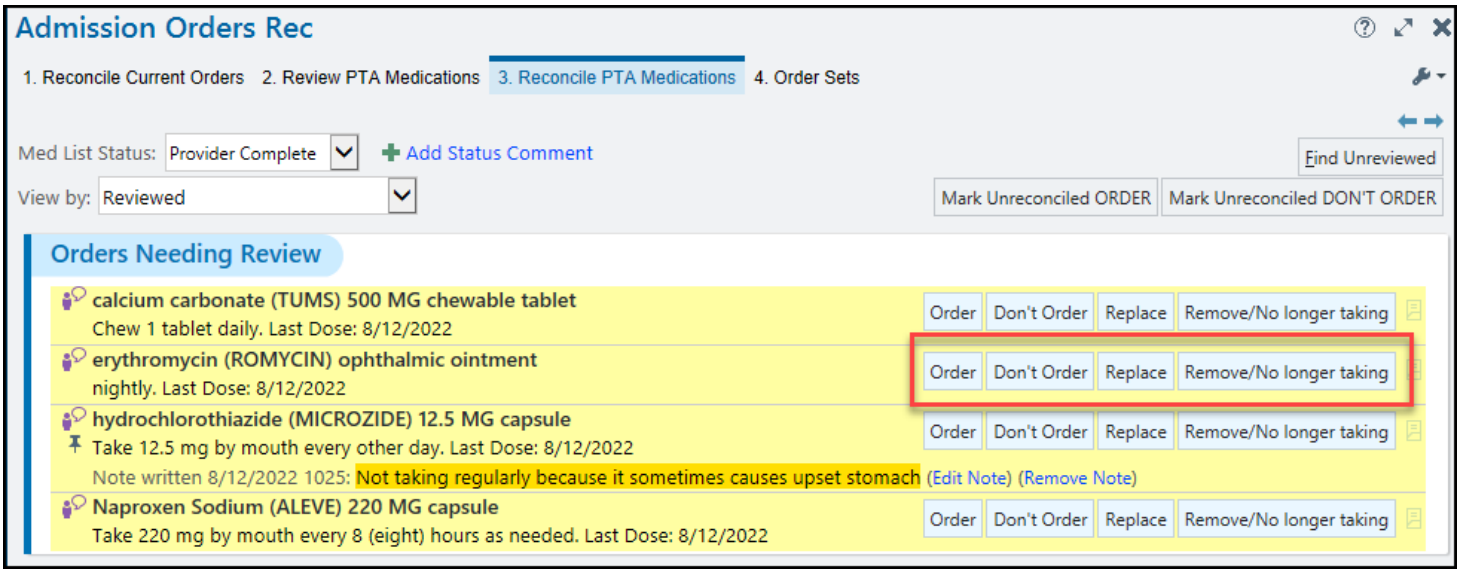
Reconcile PTA Medications

This screen allows you to continue or discontinue home medications. Like in **Reconcile Current Orders**, you can address individually or by the unaddressed orders (yellow highlight). Click the **Next** button. *Can be skipped.



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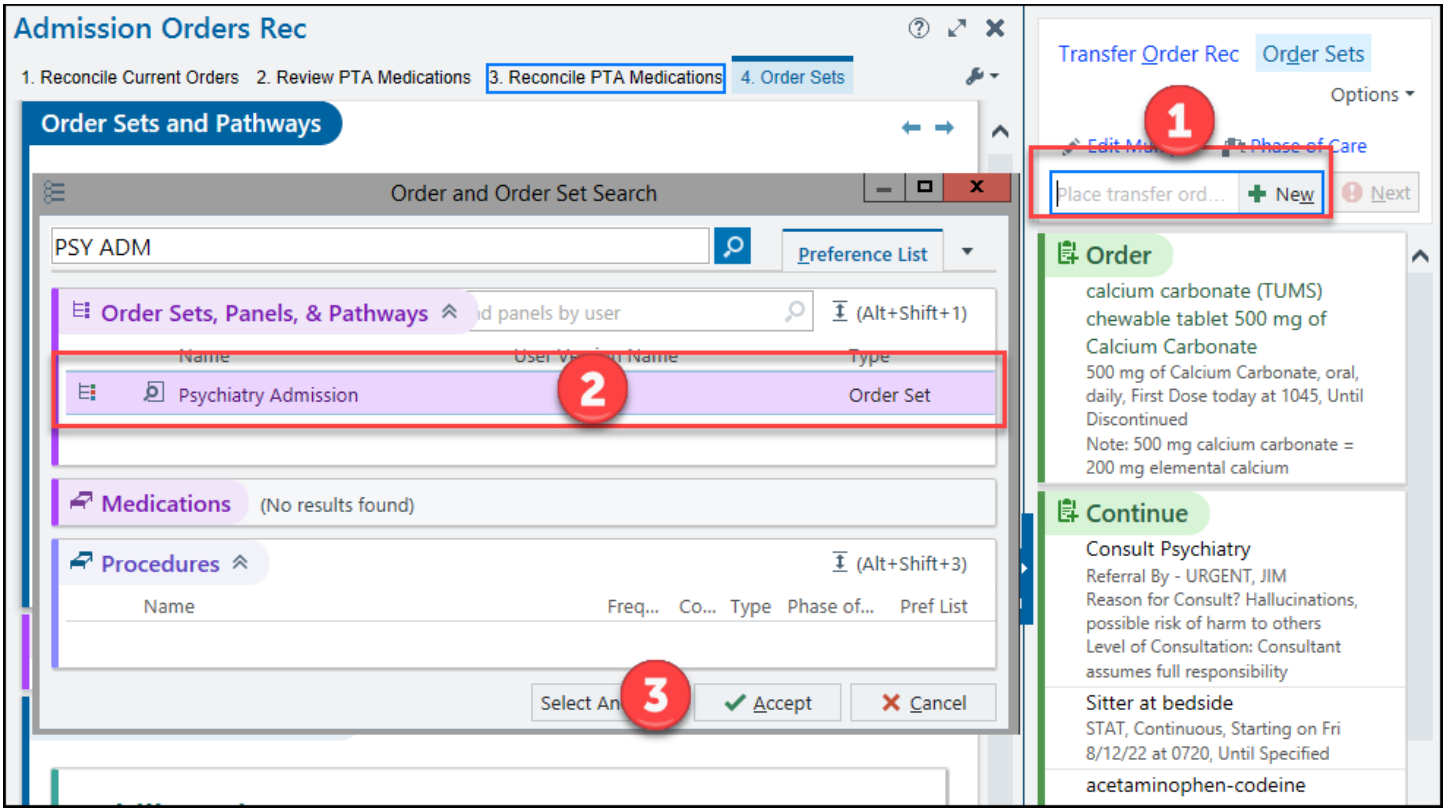
Order Sets

The final screen is where you'll select the **Psychiatric Admission** order set. The right sidebar contains the current orders, as selected by the previous three screens. Select **Order Sets** from this sidebar.

1. Type **Psychiatry Admission** in this box.
2. Select **Psychiatry Admission**.
3. Click **Accept**.

Note: You can save this order set to your favorites for faster reference.



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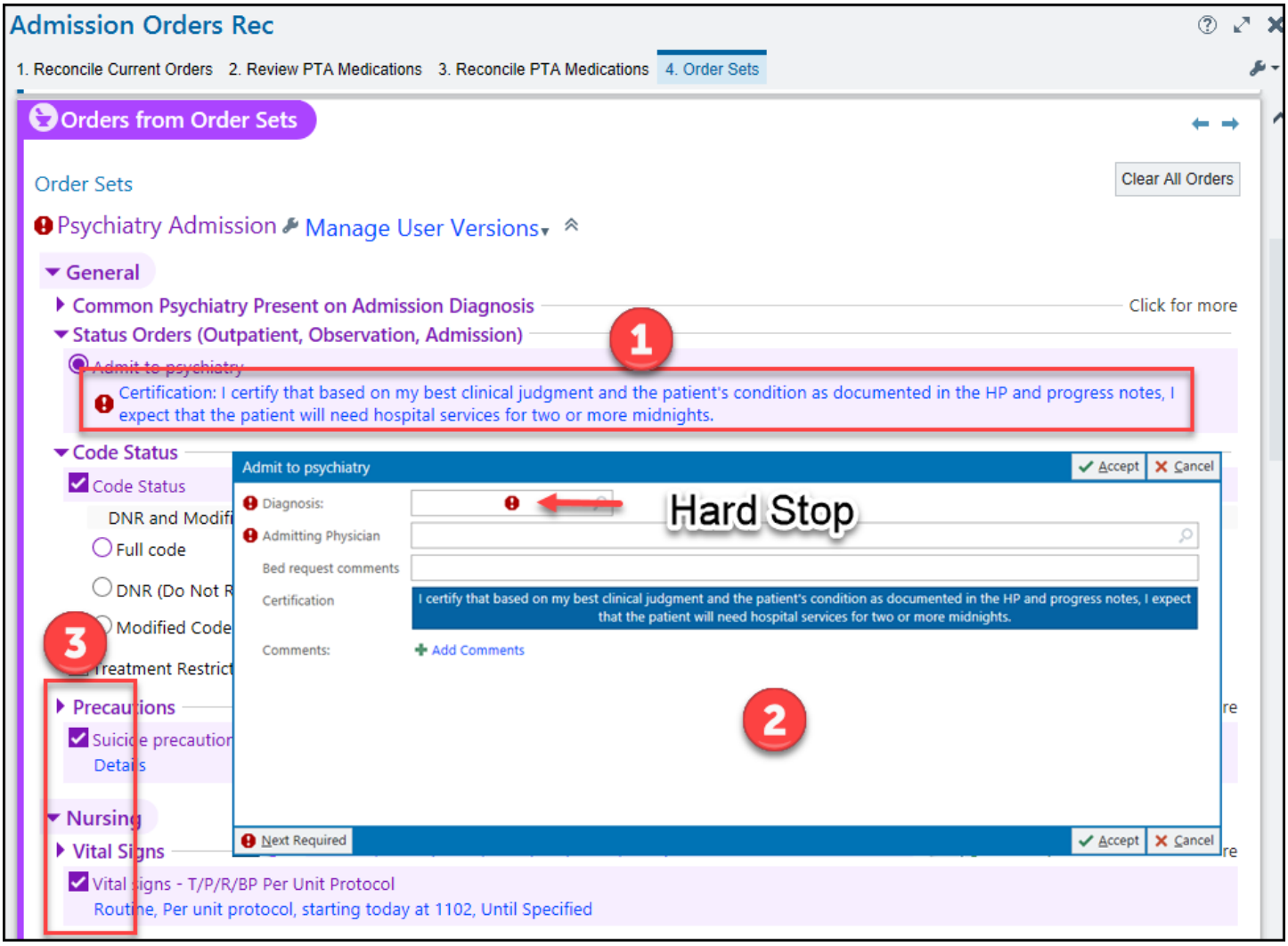
The following screenshots are the outline of the **Psychiatry Admission** order set.

1. Click the **Admit to Psychiatry Certification** selection. The **Admit to Psychiatry** order will appear.
2. Complete all hard stops. Continue through the order set and select or un-select orders (the admission order can be entered separately from the order set).
3. Some orders are pre-selected.

Note: Admitting Physician is the physician who accepted the patient to Main 7N.



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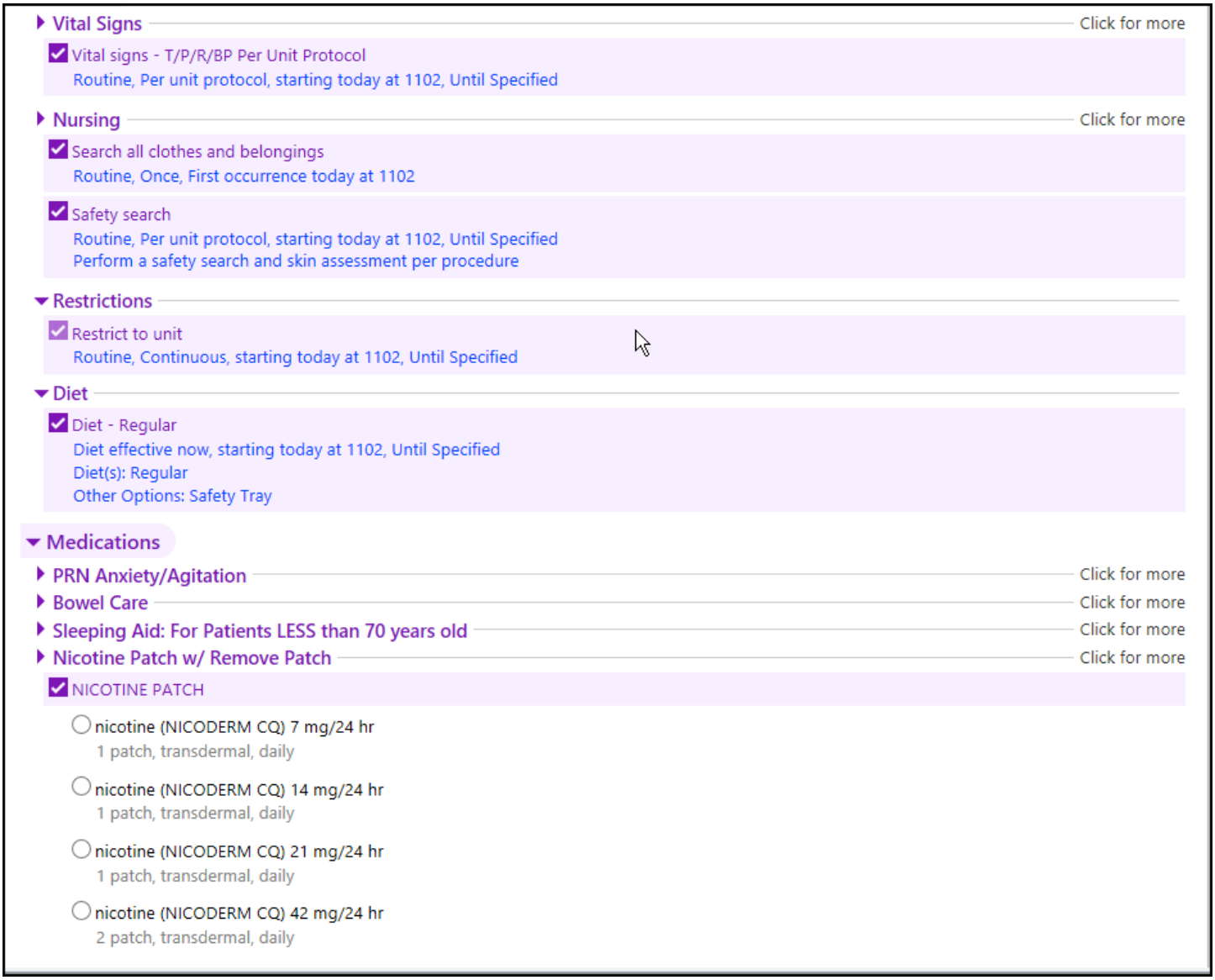

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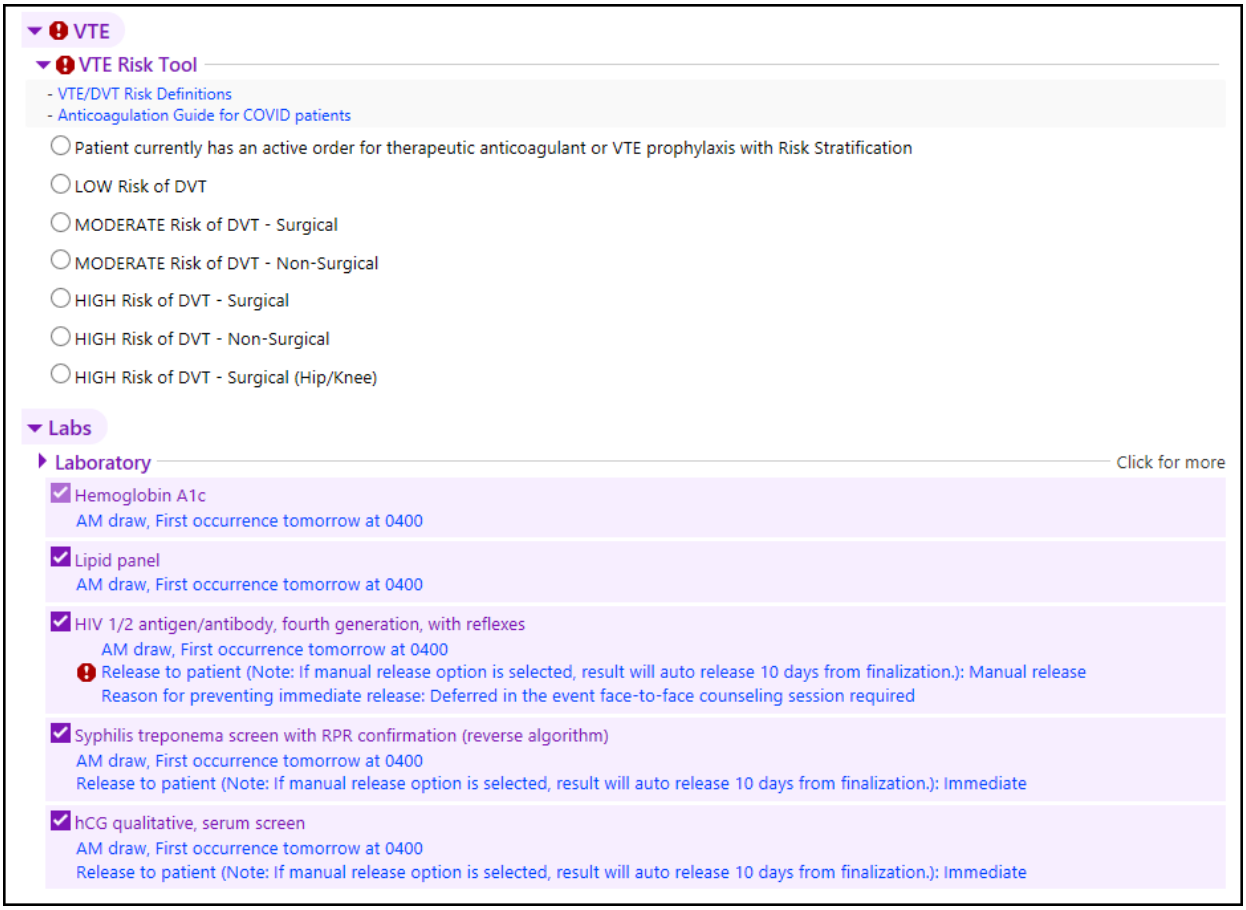

Low Risk Definition	**Moderate Risk Definition** Pharmacologic prophylaxis must be addressed. Mechanical prophylaxis is optional unless pharmacologic is contraindicated.	**High Risk Definition** Both pharmacologic AND mechanical prophylaxis must be addressed.
Age less than 60 years and NO other VTE risk factors	**One or more** of the following **medical conditions**:	**One or more** of the following **medical conditions**:
	CHF, MI, lung disease, pneumonia, active inflammation, dehydration, varicose veins, cancer, sepsis, obesity, previous stroke, rheumatologic disease, sickle cell disease, leg swelling, ulcers, venous stasis and nephrotic syndrome	Thrombophilia (Factor V Leiden, prothrombin variant mutations, anticardiolipin antibody syndrome; antithrombin, protein C or protein S deficiency; hyperhomocysteinemia; myeloproliferative disorders)
	Age 60 and above	Severe fracture of hip, pelvis or leg
	Central line	Acute spinal cord injury with paresis
	History of DVT or family history of VTE	Multiple major traumas
	Anticipated length of stay GREATER than 48 hours	Abdominal or pelvic surgery for CANCER
	Less than fully and independently ambulatory	Acute ischemic stroke
	Estrogen therapy	History of PE
	Moderate or major surgery (not for cancer)	
	Major surgery within 3 months of admission	

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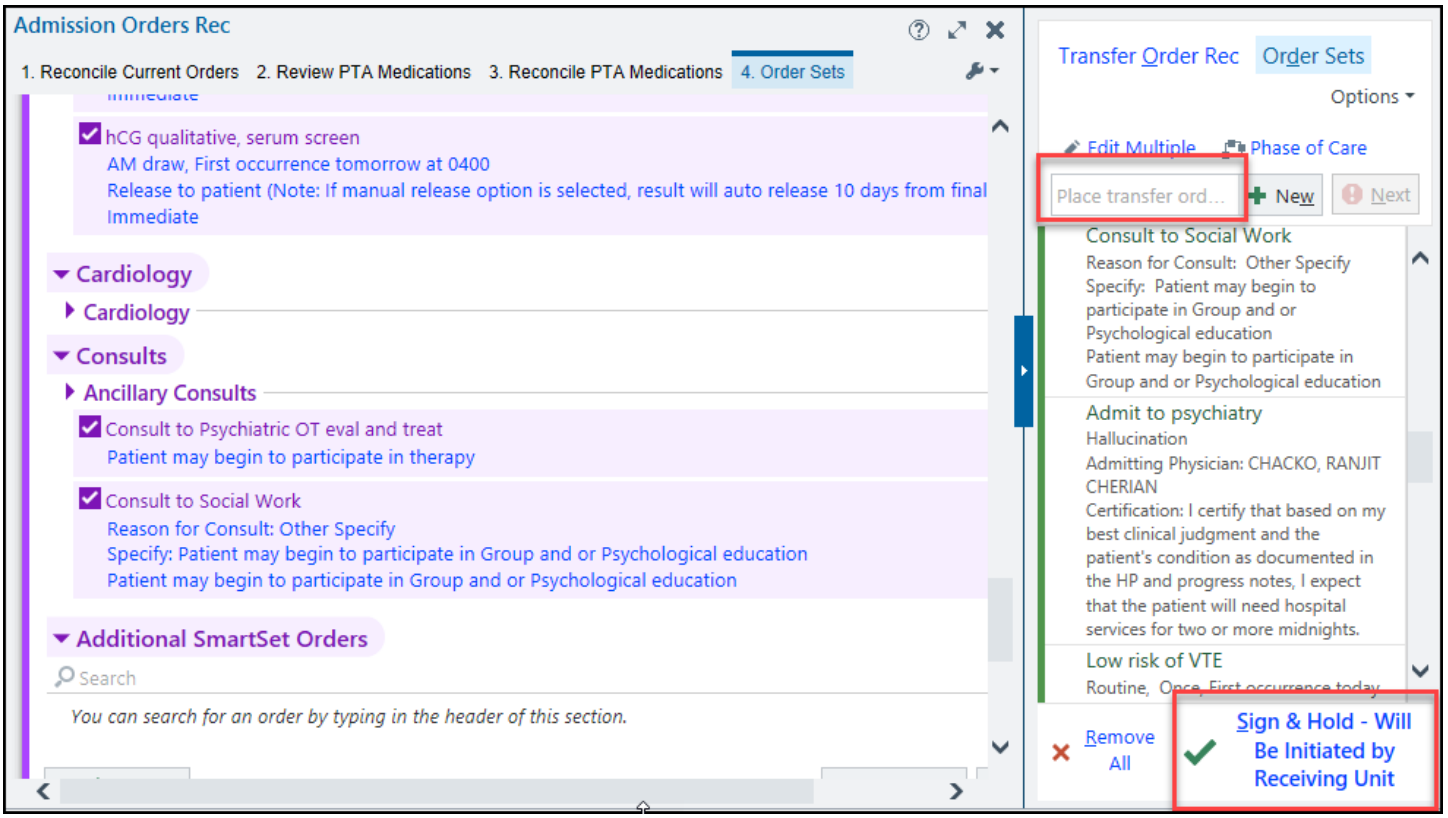
If you forget an order for admission, you can return to the **Admission** tab and place orders in the right sidebar. This will ensure it's for admission and not the patient's current unit.

Complete the admission orders by clicking **Sign & Hold – Will be Initiated by Receiving Unit.**



If orders are needed after the patient has been admitted, follow the steps outlined in the **Placing an Order** section of this guide.

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