EPIC CHECKLIST FOR INTERNS

☐ **Format personal schedule view**: (click on gears)
Remove: ☐ Status
☐ Controlled substance monitoring
☐ My chart
☐ Referring provider cred
☐ CSN

Add: ☐ Status (7601731901)
☐ PCP (17316)
☐ DOB (17314)
☐ HCC gap

Place in this order: Appt Time
Checked in
Status
Patient
Age/Sex
DOB
Notes
Provider
HCC gap
PCP
Last abstracted

☐ **Learn how to view provider calendar**
☐ Go to scheduling/templates/provider calendar*
☐ Select the provider you are searching
☐ Now that it appears on the navigation panel on the left, **click the pushpin** to the right of
"provider calendar" so that you won't have to search for it again.
*some users will not have "templates" in their view, see attending for help

☐ **Create a preference list**
☐ Go to tools/preference list composer
☐ Select "copy user" and use "TAN, STEPHANIE"
☐ Select "orders preference OP" then click "copy"
☐ Format list as desired
Note: Copied lists are not dynamic, ie if changes are made to the owner's list, they will not transfer to the users who have copied the list before the changes.

Add Preventive Health Preference List
Go to Preference List Composer-> Select Copy User in bottom left hand corner-> Search George, Emily in "From User" text box-> Check "Other (Outpatient)-> Hit Copy

☐ **Learn how to add smartphrases**
☐ Go to tools/smartphrase manager
☐ Select an individual user, select a phrase, and click "share" to bring up a box to add yourself
☐ Or open a phrase to review it, go to the "Owners & Users" tab, then select "add myself."
Note: Smartphrases can only be changed by the owner of the phrase. When a phrase is changed, it changes for anyone using the phrase in the future.

☐ **Learn how to add smartbuttons**

☐ **Grant permission to all residents and attendings in the program** (see list provided). If you do not do this, you will not get coverage when you are not available.