# Scribing Notes and Routing to Providers
User Guide

November 11, 2016

Below is a guide covering the steps to be completed in the Epic System for a non-credentialed users to transcribe / scribe an ambulatory visit note and route the pended notes for the provider's signature, so that the note will become a part of the final medical record.

Please note: provider scribes / transcriptionists will not have the ability to practice this guide in the Playground Environment (PLY) - please retain this User Guide to support your actual work in the Production environment.

Try It Out

1. Login to Epic Hyperspace PROD (production environment) using your personal username and password.
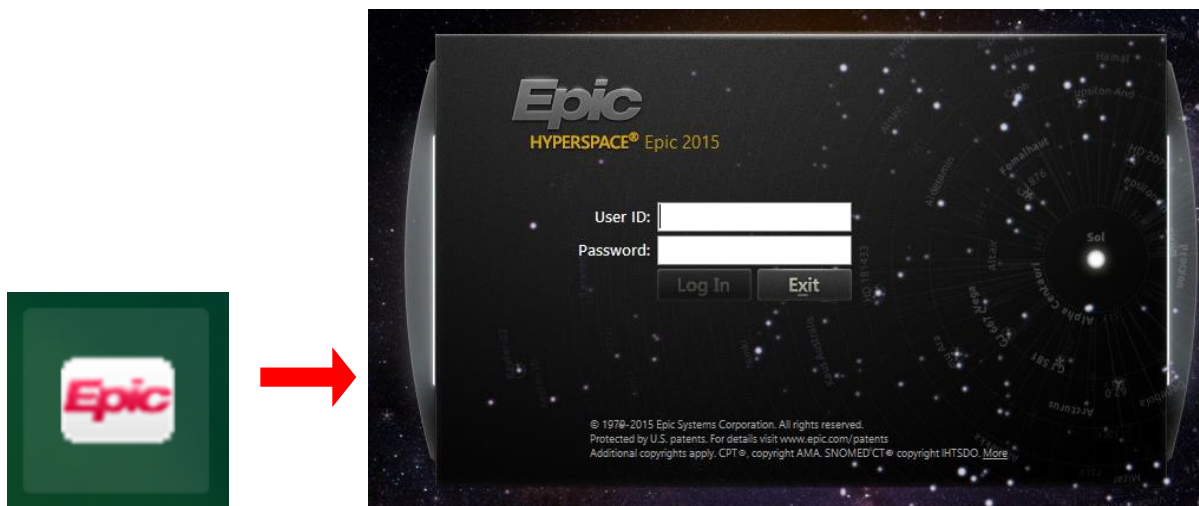
2. **Important:** Users with multiple roles will need to review the JOB selection screen that appears immediately after login. Using the selection button [🔍] review the available Job functions and select your Scribe / Transcriptionist Role if you are assigned multiple roles. Select your role and Click OK.
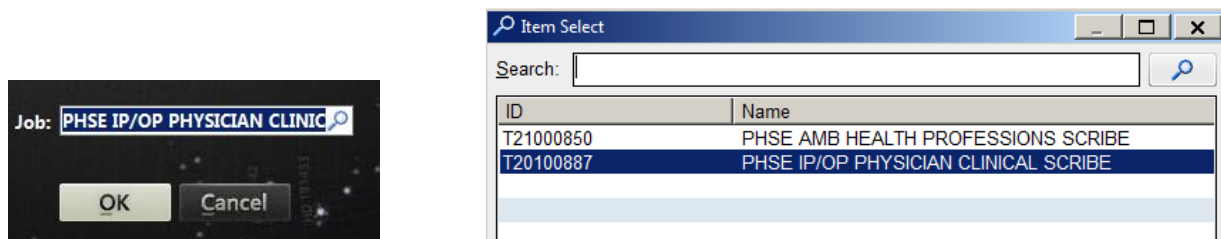
3. Select your Department and complete your login by clicking OK.

4. Your next step will be to select a specific patient encounter. In an ambulatory department you'll have two major ways to locate your patient.

- **FROM A SCHEDULE**
  - o If your profile is configured to display a provider or department schedule, you'll be able to review the day's schedule from the upper ½ of the screen – double click on the appropriate Patient/Appointment to open the chart to begin documenting.

- **SEARCHING FOR AN ENCOUNTER**
  - o If you don't have a preconfigured schedule you'll be able to search for a patient and select the appropriate encounter to associate with your note. From the main Epic menu (upper left) select ENCOUNTER from the drop down. Alternately, user the Search Box in the upper right and type ENCOUNTER and left click on Encounter to jump to the encounter search box.

 or
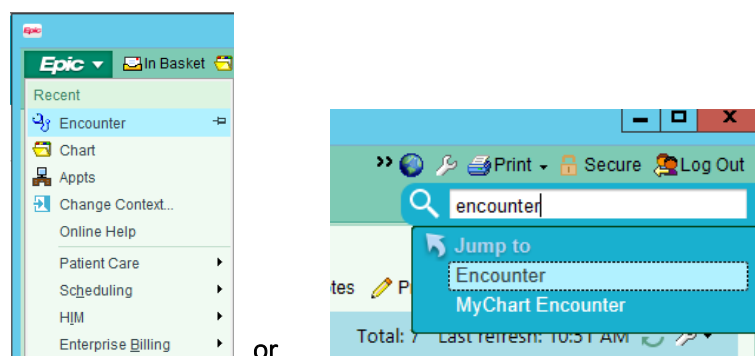
  - o The encounter search box will appear. Enter your search criteria and click the **Find Patient** button to search for the patient:

- o A list of patients matching your search will appear. Review this list and double click to select the appropriate patient:

- o The next box will contain a list of encounter records for your selected patient:

- o From this box – double click the appropriate encounter to associate your note to.

5. Now that you have opened the chart for the appropriate patient and encounter, proceed to the **Notes** activity to begin your note.

6. Complete your note using either a blank note (select: [Create Note] or using NoteWriter by selecting an available template from the drop down arrow next to the **Create Note in NoteWriter** Button
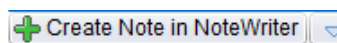

- o Note: The department you are logged into will determine what NoteWriter templates you will have access to. Please review with your department what templates you will use.
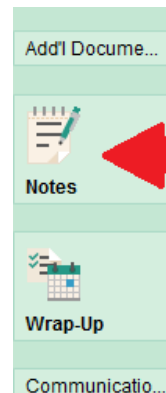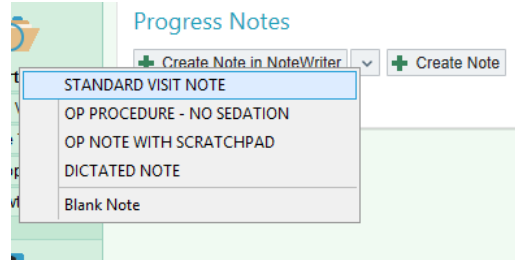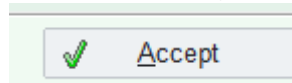
7. As a scribe/transcriptionist – you'll notice that your note will have **Pend on saving note** – in the lower left. This indicates your note will not be immediately added to the medical record of the patient, but will be pending the approval of the provider.
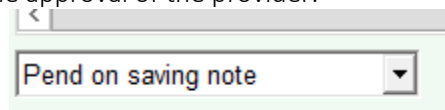

8. Enter the contents of your note and choose the Accept button at the bottom right of the screen.

9. To route this note to the provider to sign, you'll use the Wrap-Up activity (left side navigation).
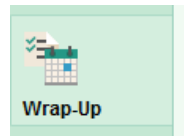
10. Within the wrap up activity, you'll see the **follow up** section. You may need to scoll down as it's one of the last activities in the section. Within the follow up section, you'll most often need to expand [⊗ Expand] the lower half of the section, such that the "Send Chart Upon Closing Workspace Section" is visible.
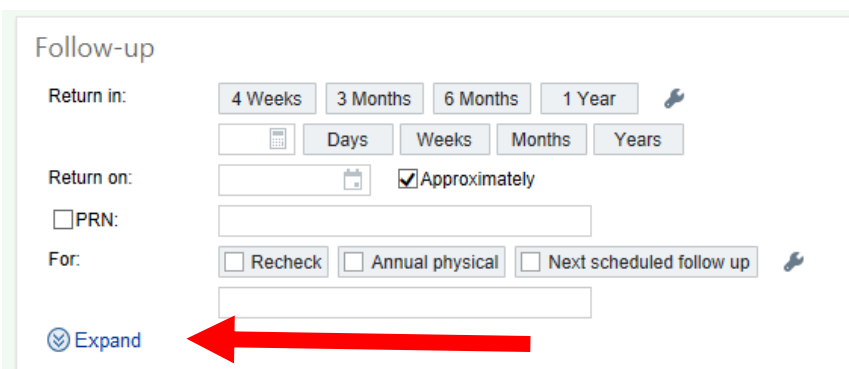
11. In the **Recipient** box of the "Send Chart Upon Closing Workspace" add the name of the provider you are scribing for. [tip: you can search by their login ID, rather than having to use name.]

12. At this point just close the workspace (use the X to the right of the patient's name on the tab at the top of the screen.)

- The provider will see a note in their InBasket in the folder **CC'd Charts**:
- They must double click on the chart, review the note and sign it, then close the encounter normally.