Hospice IDG Workflow Dress Rehearsal

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By working with other roles to complete this workflow dress rehearsal, you'll gain practice doing your day-to-day workflows and gain exposure to your organization's Epic content prior to go-live. This is your opportunity to practice with your colleagues in a safe, controlled setting and gives you a chance to see how everyone's work affects each other.

Environment name: CRE

Prep for IDG

SCENARIO:

You're planning for IDG. First, the IDG facilitator will use reports to identify patients needing review. Then, they will create the Plan of Care Update. Next, every discipline will open that Plan of Care Update and complete any required advance documentation.

- PATIENT: Merle Aonesauce
- Merle had a hospice admission visit with a skilled nurse, which included the HIS and comprehensive assessment. Now, he needs initial IDG review.

IDG facilitator

LOGIN

- Username: hspcdir
- Password: epic

TRY IT OUT:

1. Log into Hyperspace and locate reports related to IDG:
    - The Hospice Quality Review Dashboard links to reports with subsequent IDGs that are overdue, due today, due in 1-3 days, and due in 4-7 days. There is also a component for Initial IDG review needed. Hover over the component and click  to see details
    - Or, search for the reports:
        - Open **My Reports** from your toolbar.
        - Search IDG for a list of IDG-related reports.
        - HSPC Initial IDG Review Needed: Hospice patients who have not yet had IDG review.
        - HSPC Subsequent IDG Review Needed: Hospice patients who have not had IDG review in the last week.
        - HSPC IDG Recent Discharge Review Needed: Returns hospice patients who have been discharged since the last IDG meeting. Hospice supervisors can use this report to find patients that need one final IDG review after discharge.
2. Locate Merle Aonesauce on the report showing patients needing initial review.
3. Create Merle's Plan of Care Update:
    - Click **Plan of Care** on the report's toolbar.
        - Note: If the person responsible for creating the Plan of Care uses the Remote Client, this step can also be done in the Plan of Care task.

        - Notice the Admission Plan of Care, which was created during the hospice admission.
    - Click **Start a New Plan**, then select **Plan of Care Update.**
        - For each IDG meeting, you'll create a new Plan of Care Update.
4. Update the dates:
    - In **Effective From**, enter the date of the IDG meeting.
    - In **Effective To**, enter the date before the following IDG meeting.
    - Can use date shortcuts like t for today.
5. Now that the Plan of Care Update exists, you're ready to move on to the next section of this dress rehearsal.
    - For today's activity, keep the Plan of Care open while other disciplines complete their documentation.

All disciplines

LOGIN:

Log in to either Hyperspace or the Remote Client with the usernames below. Multiple people can be logged in with the same username. Password for all users is **epic**.

- Medical director: hspcdir
- Nurse: hspcrn (or qolarn)
- Social worker: hspcmsw
- Chaplain: hspccp
- Child Life Specialist: qolacls
- Volunteer coordinator: hspcvc
- Bereavement Coordinator: hspcbc

TRY IT OUT: REMOTE CLIENT USERS

1. Add Merle Aonesauce so he appears in your My Patients task.
2. Go to the Plan of Care task and open Merle's new Plan of Care Update.
3. Write the IDG note for your discipline.
4. Sync!

TRY IT OUT: HYPERSPACE USERS

1. Open the Hospice Plan of Care activity.

- If you don't see the button on the Hyperspace toolbar, you can search from the search bar.

2. Search for Merle Aonesauce and open his new Plan of Care.
3. Write the IDG note for your discipline.

IDG Meeting

SCENARIO:

While the facilitator leads the discussion, clinicians make any necessary edits to patient documentation. At the end of the meeting, the facilitator completes the Plan of Care.

- PATIENT: Merle Aonesauce
- Previously in this dress rehearsal, Merle appeared on a report showing patients who need an initial IDG. The facilitator created the Plan of Care and other disciplines added advance documentation as needed. Now it's time for IDG!

IDG facilitator

LOGIN

- Username: hspcdir
- Password: epic

TRY IT OUT:

1. Refresh the Plan of Care to view notes written during IDG prep. Review these as you normally would.
    - Have at least one discipline update their note.
    - Refresh to see these changes.
2. Scroll to the **Medications** section. Discuss the patient's medications and hospice coverages.
    - Have a nurse add or remove a medication from the Plan of Care.
    - Have a nurse change hospice coverage on a Plan of Care medication.
    - Refresh to see these changes.
3. Scroll to the **Problems** section to view the care plan.
    - Have a clinician update an intervention on the Remote Client and sync.
    - Refresh to see these changes.
4. Review the list of participants in the sidebar and make changes as needed.
    - This list comes from the patient's care team.
    - Make sure the medical director is listed as **Must Sign**.
5. After one last refresh, **Finalize** the Plan of Care to indicate that everyone is done with their documentation. This sends the plan of care to anyone marked as Must Sign and prompts their signature.
    - Required signers can sign from the participants sidebar or from their In Basket.

Additional Resources

- In Hyperspace, press **F1** to access your Learning Home Dashboard. Use the resources on your Learning Home to find steps to complete any parts of this guide.
- The Remote Client and Rover do not have Learning Homes, so field users will be able to access quick start guides/tipsheets separately.

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