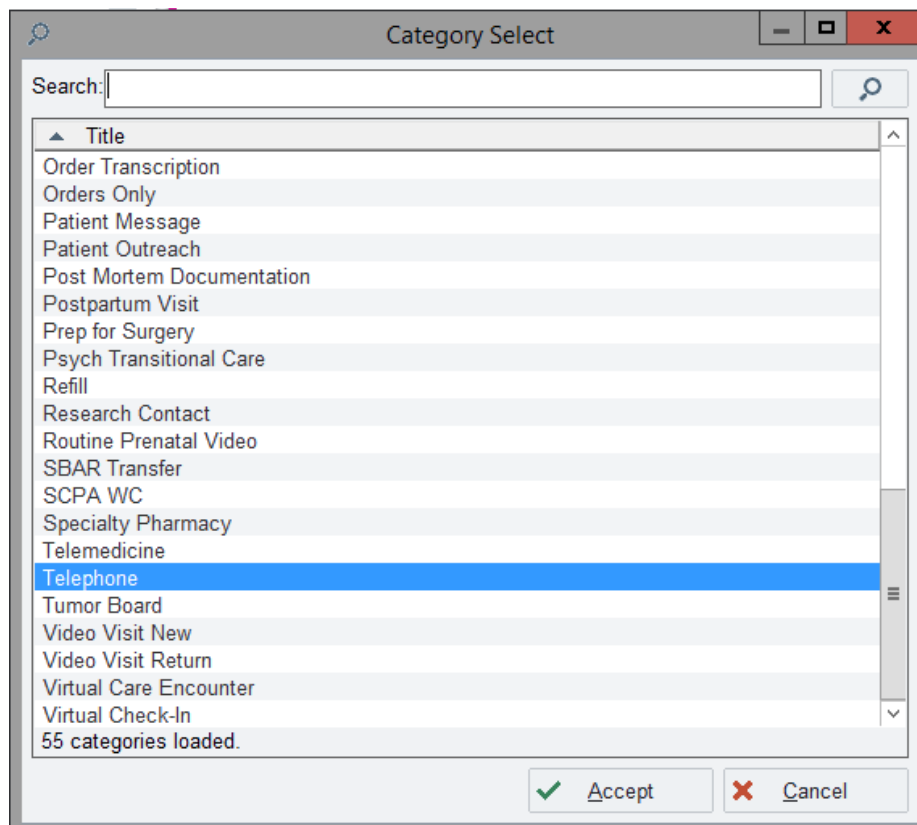


*This Epic Tip Sheet demonstrates the workflow of creating, documenting and signing a telephone encounter for Research.*



## Creating the Telephone Encounter

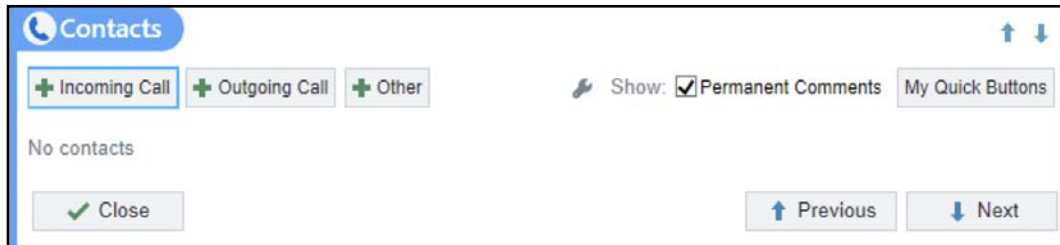
1. Click on the 'Epic' button in the upper left corner of the Epic screen.
2. Hover over 'Patient Care' sub-menu.
3. Select 'Encounter'.
4. Patient look up box will populate, then
5. Enter patient name, or MRN.
6. Select 'New' encounter.
7. In the 'Type' box, select 'Telephone'.
8. Enter the 'Provider' and then 'Accept'.



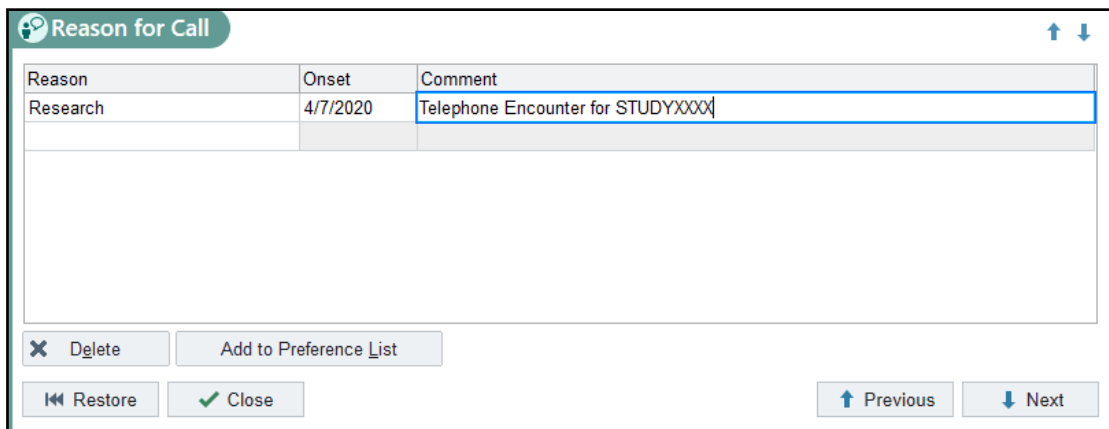


## Documenting the Encounter

- The 'Call Intake' tab will open.
- Navigate to the 'Contacts' section and select appropriate call type.

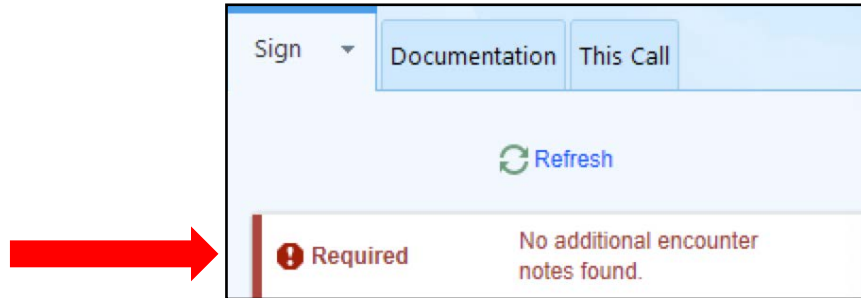


- Fill in the Date, Relationship, Contact Name, Phone and any relevant Contact comments, in the populated fields and click 'Accept'.
- Locate the 'Reason for Call' section.
- Type "Research" into the 'Reason' field. Select Research, ID 133 and click 'Accept'.
  - You may need to click on the 'Database Lookup' to locate "Research."
- In the Comment section, enter "Telephone Encounter for STUDY<SPARC ID>".



- You can click 'Add to the Preference List' for quick reference in the future.
- Close.
- Click 'SIGN ENCOUNTER' in lower right portion of the screen.

18. This will populate the 'Sign' tab and a 'Required' button



19. Select the 'Required' button and an 'Edit Note' section will populate.

20. Fill in any study related notes here and select the 'Sign' button inside the note.

## Associating the Telephone Encounter to the Study and signing

21. To associate the Encounter, to the Study, navigate to the 'Research Hub'.

- If the 'Research Hub' is not visible in your tool bar, you can select the down arrow to view more options.
- The 'Research Hub' should be towards the bottom of the list.

22. Once in the 'Research Hub', click on the 'Research Studies' option.

23. Here, you can link the encounter by simply selecting the appropriate 'Link encounter' button.



24. When you have completed the research study association, you are returned to the 'Research Hub' where you can complete your next research task such as documenting the 'Research Note.'

25. By selecting 'SIGN ENCOUNTER', the correct co-signer will be prompted to review and accept.