

**University of Wisconsin Department of Family Medicine – Residency Clinics**  
**CLINICAL POLICY AND PROCEDURE**

**TITLE: Patient Messages, Comments, FYI Entry into Epic**

**Effective Date:**

**Approval:** Vice Chair of Clinical Care

**Supersedes Policy:** none

**Contact:** DFM Director of Clinical Care Services

Reviewed				

**SCOPE:** Applies to all DFM residency and UWMF clinics.

**PURPOSE:** To provide guidelines for the appropriate placement of patient-specific comments in the three Patient Message or Comment Fields in the Epic System at DFM residency and UWMF clinics.

**DEFINITIONS:**

**Permanent Comment Field** - can be read by all Epic users. Entry is viewable in Cadence and EpicCare

APPROPRIATE	INAPPROPRIATE
<b>Permanent Comment Field</b> <ul style="list-style-type: none"> <li>• patient needs wheelchair</li> <li>• patient uses walker</li> <li>• don't call patient at work</li> </ul>	<b>Permanent Comment Field</b> <ul style="list-style-type: none"> <li>• patient refuses to walk</li> <li>• patient is HIV</li> <li>• patient is a drug seeker</li> </ul>

**Patient Option Messages** – can be read by other Cadence users within a specific clinic/department under Patient Options in Appointment Desk

APPROPRIATE	INAPPROPRIATE
<b>Patient Option Messages</b> <ul style="list-style-type: none"> <li>• patient needs 30 minutes with Dr X</li> <li>• patient will only see Dr. X</li> </ul>	<b>Patient Option Messages</b> <ul style="list-style-type: none"> <li>• patient doesn't like any of the providers in Ortho, except Dr. X</li> </ul>

**Appointment Messages** – is used by appointment scheduling staff about a specific patient appointment. Can be viewed in patient's Appointment Desk on the specific appointment – also can be viewed on nursing staff Arrival List

APPROPRIATE	INAPPROPRIATE
<b>Appointment Messages</b> <ul style="list-style-type: none"> <li>• Radiology has sent x-rays to Ortho Clinic</li> <li>• Patient is running late in MRI</li> <li>• Left message at home to reschedule</li> </ul>	<b>Appointment Messages</b> <ul style="list-style-type: none"> <li>• Patient is always late for appointment, so tell patient that appointment is 15 minutes earlier than scheduled.</li> <li>• Patient needs Viagra refill</li> </ul>

**Phone Comments** – is used by schedulers, clinical staff or providers to indicate patient preferences, instructions, or additional telephone number information. Can be viewed in either Cadence or EpicCare under Demographics.

APPROPRIATE	INAPPROPRIATE
<p><b>Phone Comments</b></p> <ul style="list-style-type: none"> <li>• Let phone ring 20 x per patient</li> <li>• Auth on file 8-20-05: may talk to husband about appointments</li> <li>• Do not call patient at home – use cell number</li> </ul>	<p><b>Phone Comments</b></p> <ul style="list-style-type: none"> <li>• Patient has a foreign accent</li> <li>• Grumpy if you call in the morning</li> </ul>

**Comments and Message Guidelines:**

- Any message or comments field allows for general factual information given specifically to and from staff, departments or among providers. The purpose of these fields is to ensure a smooth patient visit.
- It is appropriate to use GroupWise or EpicCare InBasket as a means of communicating patient-specific information of a sensitive nature. Use the patient’s MRN while in GroupWise.
- The information placed in any of the message or comments fields should be general in nature and should not include personal comments or opinions, non-clinical judgment, or derogatory remarks. Nor should the comments disclose confidential information about the patient.
- If you are uncertain if a comment is appropriate or inappropriate - Ask the clinic’s manager. If you find a comment in any patient message or comment field that you feel is inappropriate you should bring the comment to the attention of the clinic manager.

**FYI Messages** – used by clinical staff and providers for clinical or social ticklers, hunches, reminders, or suspicions. **Does not become part of the patient’s permanent record.** Can be viewed only by EpicCare users who have access to FYI functionality - under Activities.

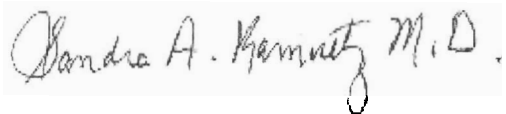
APPROPRIATE	INAPPROPRIATE
<p><b>FYI Messages</b></p> <ul style="list-style-type: none"> <li>• Question repeated requests for opioids</li> <li>• Concerns about abuse at home</li> <li>• Remind pt to schedule mammo</li> <li>• Likes to be called by middle name “Sue” rather than “Harriet”</li> </ul>	<p><b>FYI Messages</b></p> <ul style="list-style-type: none"> <li>• Hx of alcohol abuse (definitive diagnoses should be placed on the problem list)</li> <li>• Telephone call made to patient regarding test results (should open a telephone encounter)</li> </ul>

**BASED ON:** UWMF Policy: Patient Messages, Comments, FYI Entry into Epic, effective November 1, 2005

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**REVIEWED BY:** EpicCare Clinic Operations Workgroup  
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**AUTHORIZED BY:**



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**DFM Vice Chair of Clinical Care**

**2/2/07**

**Date**