

# New MICU Triage Process: Transition From Notecards to Epic

Dr. Morgan Howard

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# Process Approval:

- MICU Operations Leadership: Dr. Swiderek, Kelly, Pflaum-Carlson, Gardner-Gray
- Fellowship Leadership: Drs. Diaz, Gardner-Gray, Tirgari, Godfrey, Abu Sayf, Brugnani
- Chief Fellows
- Nursing Leadership: Charge nurses, nurse managers

# Educational PowerPoint

- This PowerPoint presentation is to serve as an educational tool for the new MICU triage process, please complete the survey link at the end so we can ensure all necessary providers are ready to use Epic as a tool to keep track of patient's that are pending admission to the MICU
- It may be helpful to open Epic while reviewing and follow along

# Overview

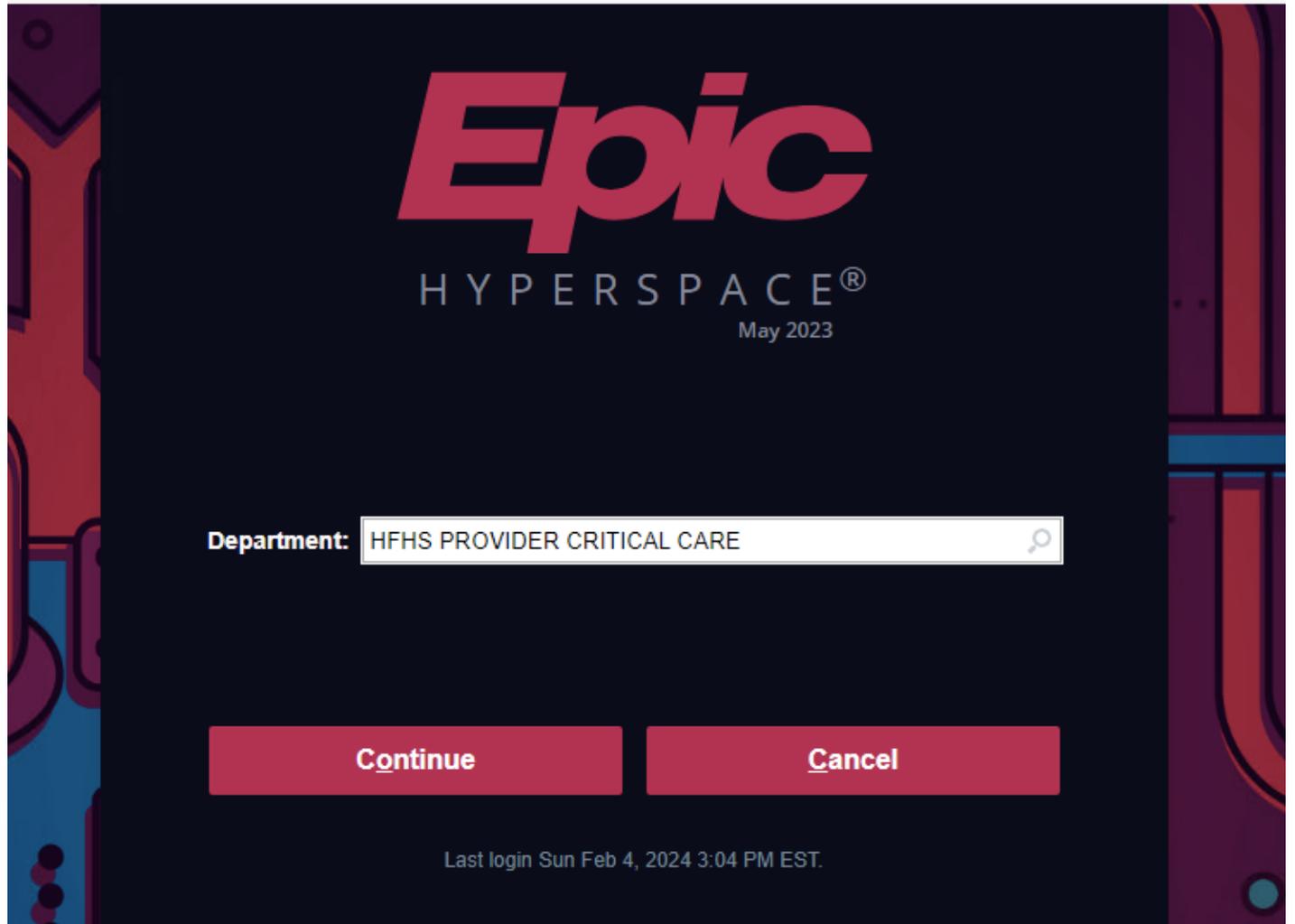
- The Triage Note Cards will be replaced with an electronic triage list in EPIC
- List will be shared with:
  - All fellows
  - All staff
  - All charge nurses
- Responsibilities
  - Charge Nurses - "View Only"
  - Fellows/Staff - Only persons adding/removing patients
    - Communicate with each person being added to the list (for now fellow should call charge with each addition, Halo is NOT up and running fully for nursing at this time, this is a work in process)
    - Communicate with Charge nurse twice per shift to review triage order/acuity
      - 0800, 1200, 1600, 1930, 0000, 0330 (to not conflict with charge nurse meeting at 4 am)
    - Remove patient from list upon ARRIVAL to ICU, (if a patient is removed from the list due to no longer needing MICU admission please call charge and let them know they are being removed)
- Goal
  - Clear, consistent, and concise communication on patients awaiting ICU transfer
  - Reduce unnecessary phone calls

# Steps to MICU Triage List

1. Log in under Department "HFHS Provider Critical Care"
2. Verify that dot phrase was shared with you
3. Access Shared MICU Triage List via Patient List Tab
4. Add Patient to list by typing MRN
5. Accessing Sticky Note
6. Assign Patient to Team List (only if assigned an ICU bed)
7. Removing Patient from List

**Step 1: Log in**

Ensure you  
are in the  
correct  
context upon  
sign-in

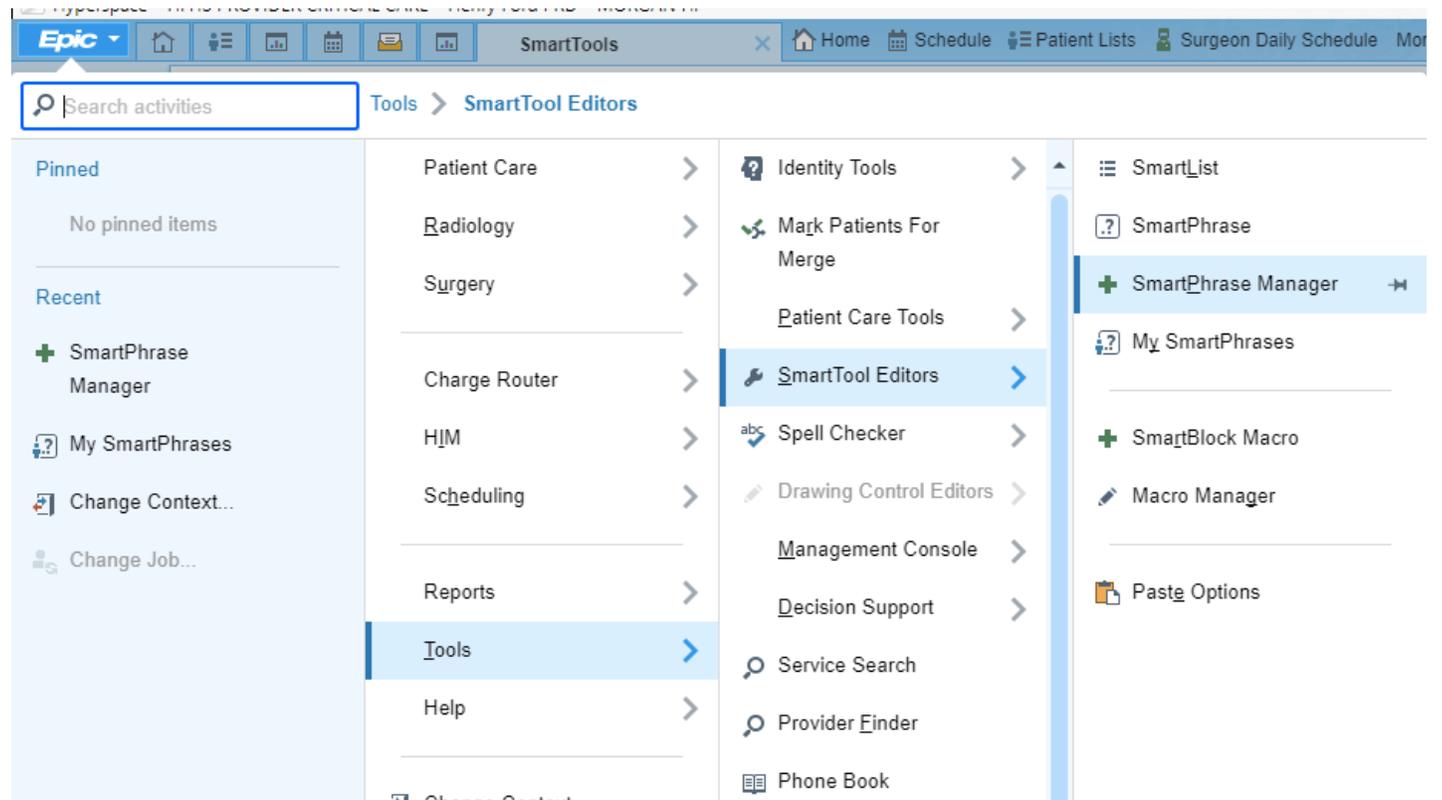


# Step 2: Verify Dot Phrase Availability

You should be granted access to dot phrase .hfhmicutriage

In the event, you do not have access follow Step 2 to add

The DotPhrase can be found in the SmartPhrase Manager: Click on Epic in the left hand corner then navigate to tools -> SmartTool Editors -> SmartPhrase Manager



You can find the dot phrase under Dr. Brugnoni's phrases, search her name in the user box and scroll down to find "HFHMICUTRIAGE"

SmartPhrase Manager - User BRUGNONI, JESSALYN [JS464545]

Level:

User

Profile

Department

Location

Facility

User:

BRUGNONI, JES...



My SmartPhrases

BRUGNONI, JESSALYN

HFHMICUTRIAGE

Sending Hospital:\*\*\* Pertinent Past Medical History:\*\*\* Reason for Transfer or Admission

# You can add yourself as a user or create your own copy

User SmartPhrase – HFHMICUTRIAGE [948691]

This SmartPhrase is currently read-only.  
You don't have the security to edit this SmartPhrase.

1 2 3 4 5 6 7 8

**Sending Hospital:**\*\*\*  
**Pertinent Past Medical History:**\*\*\*  
**Reason for Transfer or Admission:** \*\*\*  
**Intubated:** \*\*\*  
**Pressors:** \*\*\*  
**Date of Acceptance:** \*\*\*  
**Accepting Fellow:** \*\*\*  
**COVID Status:** \*\*\*

**Settings**

Name  
HFHMICUTRIAGE

Description  
Sending Hospital:\*\*\*  
Pertinent Past Medical History:\*\*\*  
Reason for Transfer or Admission: \*\*\*  
Intubated: \*\*\*  
Pressors: \*\*\*

Text Format  
Rich Text Plain Text

SmartLink Text Size and Font ?  
Match Template Formatting Keep SmartLink Formatting

**Synonyms**

**Sharing** You are a user [Remove Me](#)

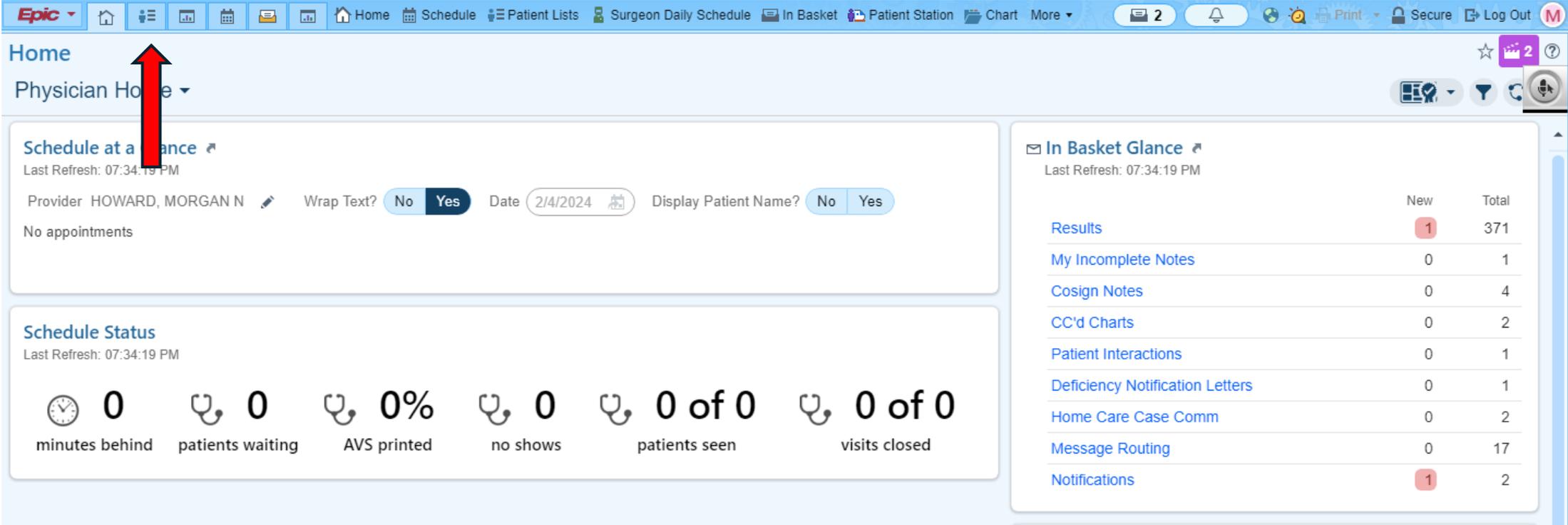
	User	Can Edit?
1	HOWARD, MORGAN N. [JGBL00988]	<input type="checkbox"/>
2	JURAYJ, KYLE KHALIL [IMP012637]	<input type="checkbox"/>
3	BRUGNONI, JESSALYN [JS464545]	<input checked="" type="checkbox"/>
4		<input type="checkbox"/>

Open Preview Create Copy Close



# Step 3: Access Shared MICU Triage List via Patient List Tab

# To access your lists, click on "Patient Lists" from your home screen



The screenshot shows the Epic home screen interface. At the top, there is a navigation bar with several menu items: Home, Schedule, Patient Lists, Surgeon Daily Schedule, In Basket, Patient Station, Chart, and More. A red arrow points to the "Patient Lists" menu item. Below the navigation bar, the main content area is divided into several sections. On the left, there is a "Schedule at a glance" section showing "No appointments" and a "Schedule Status" section with various metrics. On the right, there is an "In Basket Glance" section with a table of items.

**Schedule at a glance**  
Last Refresh: 07:34:19 PM  
Provider: HOWARD, MORGAN N | Wrap Text?  No  Yes | Date: 2/4/2024 | Display Patient Name?  No  Yes  
No appointments

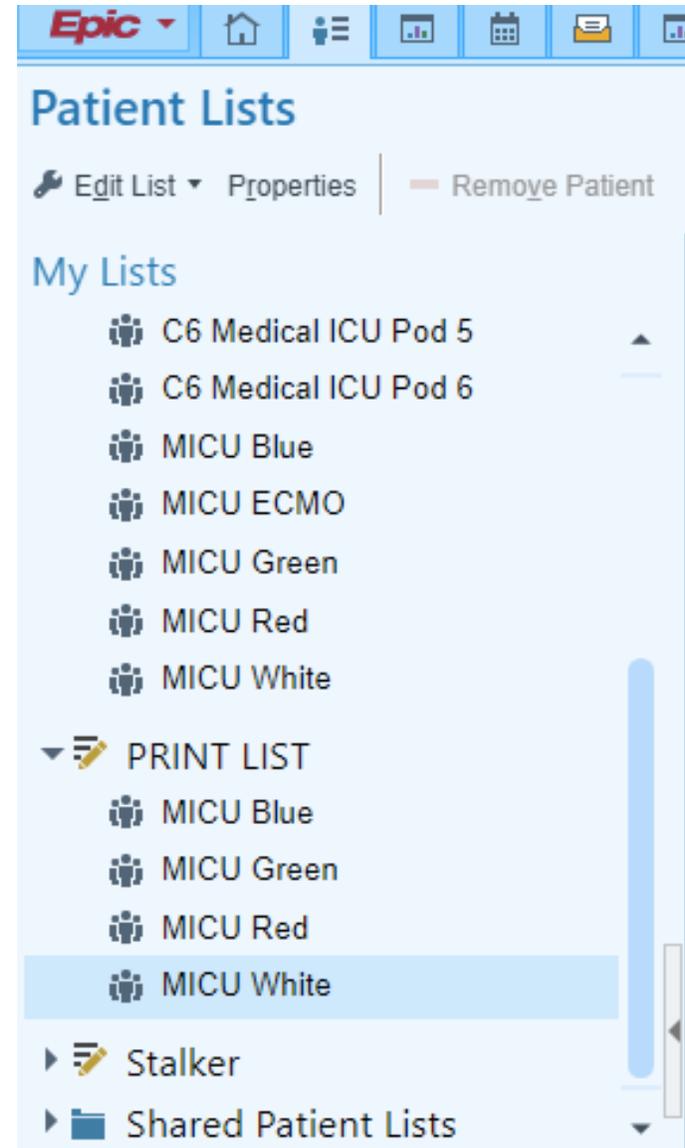
**Schedule Status**  
Last Refresh: 07:34:19 PM

0	0	0%	0	0 of 0	0 of 0
minutes behind	patients waiting	AVS printed	no shows	patients seen	visits closed

**In Basket Glance**  
Last Refresh: 07:34:19 PM

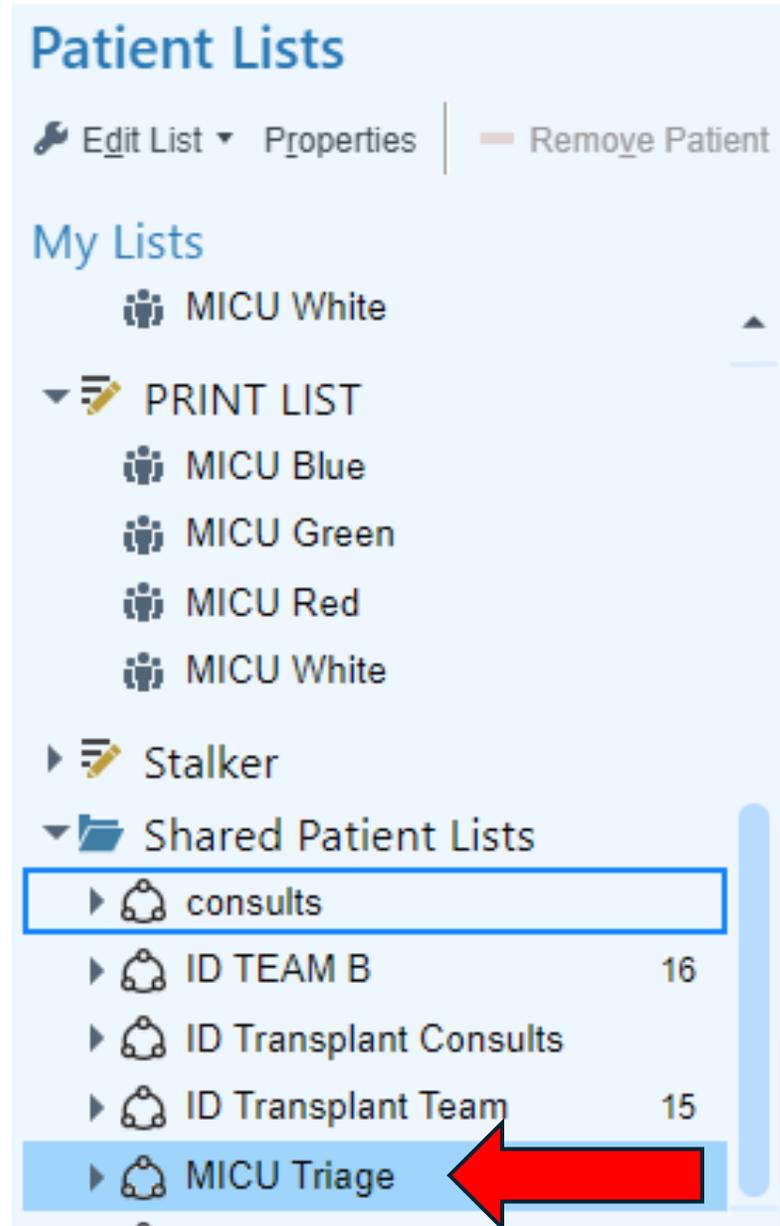
	New	Total
<a href="#">Results</a>	1	371
<a href="#">My Incomplete Notes</a>	0	1
<a href="#">Cosign Notes</a>	0	4
<a href="#">CC'd Charts</a>	0	2
<a href="#">Patient Interactions</a>	0	1
<a href="#">Deficiency Notification Letters</a>	0	1
<a href="#">Home Care Case Comm</a>	0	2
<a href="#">Message Routing</a>	0	17
<a href="#">Notifications</a>	1	2

On the left hand side scroll down to "Shared Patient Lists"



The screenshot shows the Epic software interface for "Patient Lists". At the top, there is a navigation bar with the "Epic" logo and several icons. Below this, the "Patient Lists" title is displayed. Underneath, there are options for "Edit List", "Properties", and "Remove Patient". The main area is titled "My Lists" and contains a scrollable list of patient lists. The lists include "C6 Medical ICU Pod 5", "C6 Medical ICU Pod 6", "MICU Blue", "MICU ECMO", "MICU Green", "MICU Red", and "MICU White". A "PRINT LIST" option is also visible, with a sub-list of "MICU Blue", "MICU Green", "MICU Red", and "MICU White". At the bottom of the list, there are two folders: "Stalker" and "Shared Patient Lists". A red arrow from the text on the left points to the "Shared Patient Lists" folder.

Click on the Shared Patients Lists to open the folder and then select the list "MICU Triage"



# The list of patients awaiting a MICU bed appear here

**Patient Lists** ☆ 3+ ?

Edit List Properties Remove Patient Add Patient Open Chart Patient Report Patient Msg View Handoff Form Reprints

**My Lists**

- MICU White
- PRINT LIST
  - MICU Blue
  - MICU Green
  - MICU Red
  - MICU White
- Stalker
- Shared Patient Lists
  - consults
  - ID TEAM B 16
  - ID Transplant Consults
  - ID Transplant Team 15
  - MICU Triage 6**
  - Triage

**Available Lists**

**MICU Triage 6 Patients** Refreshed just now

Patient Location	Patient Name	Age/Gender	MRN	Admit Dx/Primary Problem	Isolation/In	Specialty Comments	Provider Handoff
				Admit Dx: — Problem: None	—	Sending Hospital:*** Pertinent Past Medical H...	—
				Admit Dx: — Problem: None	—	PRIROTY	—
				Admit Dx: — Problem: None	—	57 y.o. female with PMH significant for HF EF ...	—
				Admit Dx: — Problem: None	—	Intubated - TEST.	—
				Admit Dx: — Problem: None	—		—

# From this screen patients can be added or removed from the list

The screenshot shows a software interface for managing patient lists. At the top, there is a navigation bar with the title "Patient Lists" and several action buttons: "Edit List", "Properties", "Remove Patient", "Add Patient", "Open Chart", "Patient Report", "Patient Msg", "View Handoff", and "Form Reprints". The "Remove Patient" and "Add Patient" buttons are circled in red. Below the navigation bar, there is a sidebar on the left with "My Lists" and "Available Lists" sections. The main area displays a table of patient lists, with "MICU Triage" selected, showing 6 patients. A large dark blue rectangle obscures the patient names and MRNs in the table. The table columns include "Patient Location", "Patient Name", "Age/Gender", "MRN", "Admit Dx/Primary Problem", "Isolation/In", "Specialty Comments", and "Provider Handoff".

Patient Location	Patient Name	Age/Gender	MRN	Admit Dx/Primary Problem	Isolation/In	Specialty Comments	Provider Handoff
—				Admit Dx: — Problem: None	—	Sending Hospital:*** Pertinent Past Medical H...	—
—				Admit Dx: — Problem: None	—	PRIROTY	—
—				Admit Dx: — Problem: None	—	—	—
—				Admit Dx: — Problem: None	—	57 y.o. female with PMH significant for HF EF ...	—
—				Admit Dx: — Problem: None	—	Intubated - TEST.	—
—				Admit Dx: — Problem: None	—	—	—

# Step 4: Adding a Patient

\*\*\* Patient MUST have an MRN\*\*\*

# Select "Add Patient"

The screenshot shows a software interface for managing patient lists. At the top, there is a navigation bar with the title "Patient Lists" and several action buttons: "Edit List", "Properties", "Remove Patient", "Add Patient", "Open Chart", "Patient Report", "Patient Msg", "View Handoff", and "Form Reprints". The "Add Patient" button is highlighted with a red circle. Below the navigation bar, there is a sidebar on the left titled "My Lists" containing a tree view of lists: "MICU White", "PRINT LIST", "MICU Blue", "MICU Green", "MICU Red", "MICU White", "Stalker", and "Shared Patient Lists" (with sub-items: "consults", "ID TEAM B", "ID Transplant Consults", "ID Transplant Team", "MICU Triage", and "Triage"). The "MICU Triage" list is selected and highlighted in blue. The main area displays a table of patients for the "MICU Triage" list, with 6 patients shown. The table has columns for "Patient Location", "Patient Name", "Age/Gender", "MRN", "Admit Dx/Primary Problem", "Isolation/In", "Specialty Comments", and "Provider Handoff". The first row is highlighted in blue. A large dark blue rectangular box is overlaid on the "Patient Name" and "Age/Gender" columns of the first row. In the top right corner, there is a search bar labeled "Search All My Lists" and a refresh button.

Patient Location	Patient Name	Age/Gender	MRN	Admit Dx/Primary Problem	Isolation/In	Specialty Comments	Provider Handoff
—	—	—	—	Admit Dx: — Problem: None	—	Sending Hospital:*** Pertinent Past Medical H...	—
—	—	—	—	Admit Dx: — Problem: None	—	PRIROTY	—
—	—	—	—	Admit Dx: — Problem: None	—	—	—
—	—	—	—	Admit Dx: — Problem: None	—	57 y.o. female with PMH significant for HF EF ...	—
—	—	—	—	Admit Dx: — Problem: None	—	Intubated - TEST.	—
—	—	—	—	Admit Dx: — Problem: None	—	—	—

After clicking "Add Patient" a box appears to search for your patient

**\*\*MRN must be created by ATMO for patient**

Search for a Patient

Name/MRN SSN Sex Birth Date Phone

Appt. Provider Appt. Dept. Careteam Prov.  My Patients

Find Patient

Clear

Results Recent Patients

Search for a patient to get started.  
See recently opened patients

# After finding your patient, click accept to add to the list

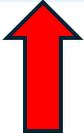
Search for a Patient

Name/MRN  SSN  Sex  Birth Date  Phone

Appt. Provider  Appt. Dept.  Careteam Prov.   My Patients

Results Recent Patients

Ma...	Patient Name	MRN	Birth Date	Legal Sex	Street Address	SSN
[Redacted]						



# Step 5: Accessing Sticky Note

Patient information will appear on shared list.  
Additional ICU triage details will be added under  
"Specialty Comments" Column

**Patient Lists**

Edit List Properties Remove Patient Add Patient Open Chart Patient Report Patient Msg View Handoff Form Reprints

My Lists

- MICU White
- PRINT LIST
  - MICU Blue
  - MICU Green
  - MICU Red
  - MICU White
- Stalker
- Shared Patient Lists
  - consults
  - ID TEAM B 16
  - ID Transplant Consults
  - ID Transplant Team 15
  - MICU Triage 6**
  - Triage

Available Lists

MICU Triage 6 Patients Refreshed just now Search All My Lists

Patient Location	Patient Name	Age/Gender	MRN	Admit Dx/Primary Problem	Isolation/In	Specialty Comments	Provider Handoff
				Admit Dx: — Problem: None	—	Sending Hospital:*** Pertinent Past Medical H...	—
				Admit Dx: — Problem: None	—	PRIROTY	—
				Admit Dx: — Problem: None	—		—
				Admit Dx: — Problem: None	—	57 y.o. female with PMH significant for HF EF ...	—
				Admit Dx: — Problem: None	—	Intubated - TEST.	—
				Admit Dx: — Problem: None	—		—

# Double click the small blue sticky note to add information

**Patient Lists** ☆ 3+ ?

[Edit List](#) [Properties](#) [Remove Patient](#) [Add Patient](#) [Open Chart](#) [Patient Report](#) [Patient Msg](#) [View Handoff](#) [Form Reprints](#)

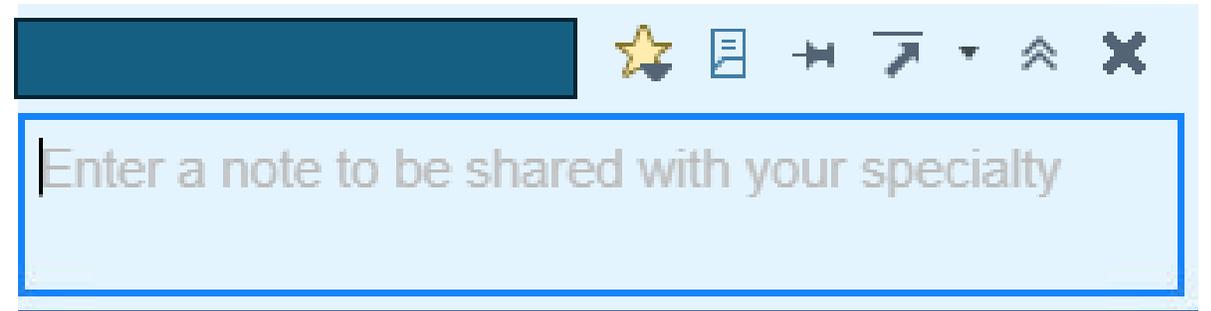
**My Lists** MICU Triage 6 Patients Refreshed just now

- MICU White
- PRINT LIST
  - MICU Blue
  - MICU Green
  - MICU Red
  - MICU White
- Stalker
- Shared Patient Lists
  - consults
  - ID TEAM B 16
  - ID Transplant Consults
  - ID Transplant Team 15
  - MICU Triage 6**
  - Triage

**Available Lists**

Patient Location	Patient Name	Age/Gender	MRN	Admit Dx/Primary Problem	Isolation/In	Specialty Comments	Provider Handoff
				Admit Dx: — Problem: None	—	 Sending Hospital.*** Pertinent Past Medical H...	—
				Admit Dx: — Problem: None	—	 PRIROTY	—
				Admit Dx: — Problem: None	—	 	—
				Admit Dx: — Problem: None	—	 57 y.o. female with PMH significant for HF EF ...	—
				Admit Dx: — Problem: None	—	 Intubated - TEST.	—
				Admit Dx: — Problem: None	—		—

A textbox appears to  
input your info, to  
standardize this  
information we have  
created a dot phrase



Enter a note to be shared with your specialty

Dot Phrase:  
.HFHMICUTRIAGE  
These fields  
should be  
completed by the  
provider who took  
the triage call

Date of Acceptance: \*\*\*  
Sending Hospital/Location: \*\*\*  
Pertinent Past Medical History: \*\*\*  
Reason for Transfer or Admission: \*\*\*  
Intubated: \*\*\*  
Pressors: \*\*\*  
Accepting Fellow: \*\*\*  
COVID Status: \*\*\*  
Re-conference with ATMO: \*\*\* Y or N  
|

Last updated: Today by You

# Step 6: Assign Patient to Team List

To be completed if patient is assigned an ICU bed

- If patient is assigned bed in MICU, please add them to their respective team list before removing them from MICU Triage shared list
- Ex. If patient is assigned a bed in POD4. Please add them to the POD 4 Team List prior to removing them from triage list.
- Team List Names
  - DET MICU BLUE = Pod 4
  - DET MICU GREEN = C6
  - DET MICU RED = Pod 2
  - DET MICU POD 1 = Pod 1

# Upon bed assignment, Right click on patient name -> Select Assign Teams

The screenshot displays a software interface for 'MICU Triage' with 3 patients. A table lists patient information, and a context menu is open over the first patient's name. The 'Assign Teams' option in the menu is circled in red.

Bed Request Status	Patient Location	Patient Name	Age/Gender	MRN	Admit Dx/Primary Problem	Isolation/Infect	Specialty Comments
Bed Ready: C6C-C632-C632-A (Ready)	C1-109	St...	98 y.o. / F	8220921	Admit Dx: — Problem: SOB (shortness...	—	Date of Acceptance:4/3/24 Sending Hospital/...
Ready to Plan: C5S	C1-113	He...	38 y.o. / M	40942810	Admit Dx: — Problem: Hypertensive e...	—	Date of Acceptance:4/3/24 Sending Hospital/...
—	604-1	Bl...	53 y.o. / M	62241491	Admit Dx: Hepatic encep... Problem: Hyponatremia (...)	—	Date of Acceptance:4/3/24 Sending Hospital/...

- Print List
- Assign Me
- End My Assignments
- Assign Others
- End Others' Assignments
- Treatment Team
- Assign Teams**
- Remove Teams
- List Memberships
- Add to Reminder List
- Copy Patient
- Send To
- Remove Patient
- Remove and Send To

Click "Assign Teams". A new window appears; type the appropriate team name followed by "accept". See next slide for Team Names

Provide Information ×

Team:  Search

Team	ID
Recent	
DET MICU GREEN	144
DET MICU BLUE Pod 4 (169533)	73
DET MICU Pod 1	71
DET MICU RED (169532)	210
DET PULM HYPERTENSION CONSULTS	173
MICU White	364
Pulmonary Interstitial Lung Disease Consults	382
DET MICU WHITE (POD3)	145
DET SICU TEAM 2	180
DET SICU TEAM 3	181
MICU POD1	323
DET Pulm IPD B	59
DET CARDIOLOGY - CICU	124
DET CARDIOLOGY HEART FAILURE\TRANSPLANT ICU	126
DET PLASTIC SURGERY	172
DET Nephro IPD B 916-0362	75
All Available Records	
Records loaded: 46. More records to load.	

# Team Names

- DET MICU BLUE
- DET MICU GREEN
- DET MICU RED
- DET MICU POD 1

# Step 7: Removing Patients

To remove a patient: click once to select the patient you would like to remove, that patient will then be highlighted with a blue color

The screenshot shows a web application interface for managing patient lists. The main title is "Patient Lists". Below the title is a navigation bar with several icons and labels: "Edit List", "Properties", "Remove Patient", "Add Patient", "Open Chart", "Patient Report", "Patient Msg", "View Handoff", and "Form Reprints". On the right side of the navigation bar, there are icons for a star, a crown with "3+", and a question mark.

On the left side, there is a sidebar titled "My Lists" containing a tree view of patient lists. The "MICU Triage" list is selected and highlighted in blue. Below "My Lists" is an "Available Lists" section.

The main content area displays a table titled "MICU Triage 6 Patients". The table has columns for "Patient", "Admit Dx/Primary", and "Provider". The first row of the table is highlighted in blue, indicating it is selected. A red rectangular box is drawn around this row. A large, dark blue rectangular area is overlaid on the table, partially obscuring the data in the first two columns of the selected row.

Patient	Admit Dx/Primary	Provider
	Admit Dx: — Problem: None	Sending Hospital:*** Pertinent Past Medical H...
	Admit Dx: — Problem: None	PRIOTY
	Admit Dx: — Problem: None	57 y.o. female with PMH significant for HF EF ...
	Admit Dx: — Problem: None	Intubated - TEST.
	Admit Dx: — Problem: None	

# After your patient is selected, choose remove patient

The screenshot displays a software interface for managing patient lists. At the top, a navigation bar includes options like 'Edit List', 'Properties', 'Remove Patient' (circled in red), 'Add Patient', 'Open Chart', 'Patient Report', 'Patient Msg', 'View Handoff', and 'Form Reprints'. Below this, a sidebar on the left lists 'My Lists' and 'Available Lists'. The 'MICU Triage' list is selected, showing 6 patients. The main table displays patient details, with a large blue rectangle obscuring the names. The table columns include Patient Location, Patient Name, Age/Gender, MRN, Admit Dx/Primary Problem, Isolation/In, Specialty Comments, and Provider Handoff.

Patient Location	Patient Name	Age/Gender	MRN	Admit Dx/Primary Problem	Isolation/In	Specialty Comments	Provider Handoff
—	[REDACTED]	—	—	Admit Dx: — Problem: None	—	Sending Hospital:*** Pertinent Past Medical H...	—
—	[REDACTED]	—	—	Admit Dx: — Problem: None	—	PRIOTY	—
—	[REDACTED]	—	—	Admit Dx: — Problem: None	—	—	—
—	[REDACTED]	—	—	Admit Dx: — Problem: None	—	57 y.o. female with PMH significant for HF EF ...	—
—	[REDACTED]	—	—	Admit Dx: — Problem: None	—	Intubated - TEST.	—
—	[REDACTED]	—	—	Admit Dx: — Problem: None	—	—	—

# You will then receive a prompt to confirm your choice

Patient Lists



Are you sure you want to remove the selected patient?

You can add the patient back to a list at any time.

Remove

Don't Remove

# Fellow and Staff Roles and Responsibilities

# Fellow/Attending Responsibilities

- Patient's must have an MRN prior to adding to the list. If ATMO does not have an MRN available/created, please kindly advise them to call back once information is ready
- It is expected that you add patients to the list within a timely manner (<30 minutes upon receiving call) using the dotphrase to standardize information
- Immediately call charge nurses upon adding/removing patient from the list (current standard practice)
  - Addition of Patient to List
  - Removal of patient warrants a call in the following circumstances:
    - Transfer Cancelled
    - Patient Downgraded
    - Patient Expires
  - You do not have call charge to remove a patient who was assigned a bed in the ICU
- It is the triage physician's responsibility to maintain the accuracy of the list and add/remove patients accordingly:
  - Add all patients awaiting ICU placement
  - Remove patient from list when they **physically arrive** to their MICU bed (not upon bed assignment)
    - Prior to removing patient from MICU Triage, please add the patient to the appropriate teams list
      - (ex. Add POD 4 assigned patient to POD4/MICU Blue List, then delete from shared list)
  - Remove patients who no longer require ICU admission (transfer cancelled, downgraded, or expired) after communicating with charge nurse
- The MICU charge nurse will also have access to the list for viewing. It is expected that the charge nurse is contacted every time a patient is added or removed from the list, or a bed is assigned. Additionally, there will be mandatory conference times (twice per shift) for charge and triage physician to discuss priority of assignments in more detail.
  - Mandatory Conference Times – Twice per shift
    - DAY: 0800, 1200
    - EVENING: 1600, 1930
    - OVERNIGHT: 0000, 03:30

# Charge Nursing

- Ensure logged in under "Provider Critical Care" and have access to shared list at start of shift
- Refresh list and view at own discretion for planning needs
- Conference with Triage Fellow/Physician at designated times:
  - Immediate Calls
    - Bed assignments
    - Any addition/removal of patient from list
  - Mandatory conference times (address priority concerns)
    - Day: 0800, 1200
    - Afternoon: 1600, 1930
    - Overnight: 0000, 0330

# On the Go?

- The MICU Triage List can be accessed on your HFH Phone by using the EPIC app
  1. Log in to Epic Haiku App
  2. Select "Patients" in bottom left corner
  3. Select "Patient List" at top center of screen
  4. Click on "Shared Patient List" -> "MICU Triage"
    - Your list may not be immediately visible and may require you to click back arrow to see all lists
  5. Click "Edit" in top left
  6. Click "+" in top left
  7. Enter Patient MRN and select patient
    - You cannot access sticky note on the go
    - On the go entries still require the sticky note to be entered at a later time on a desktop computer

# Survey Link

Please click the link below and complete the one question survey to receive credit for completing this review of the new triage process

<https://www.surveymonkey.com/r/86SX3F9>

Thank you for your time and let us know if you have any questions or concerns!

# Proposed Conference Times/Schedule

- 0800
  - Day Fellow + Day Charge
- 1200
  - Day Fellow + Day Charge
- 1600
  - Late Fellow + Day Charge
- 1930
  - Late Fellow + PM Charge
- 0000
  - Overnight Fellow + PM Charge
- 0330
  - Overnight Fellow + PM Charge

# Epic

Hyperspace<sup>®</sup> May 2023  
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Department:

Continue

Cancel

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