

YPNP – How to Document Telephone Notes in EPIC

- Click “Epic” button in the top left corner
- Under “Patient Care,” choose “Telephone Encounter”
- Enter the MRN
- For Provider, Dr. Camille Brown
 - o If in contact with the PCP and working with them directly, can use their name
- In the Telephone Note, scroll down to the “Reason for Call” section and click the pencil symbol to edit
 - o For “Reason for Call,” choose “Other
 - o For Comment, type “Yale Patient Navigator Program Outreach Call”
- Scroll down to the “Documentation” section
 - o For Service, click the magnifying glass and choose “Case Management”
 - o For Summary, type “Yale Patient Navigator Program Outreach Call”
 - o Type your telephone note into the box
 - Always identify yourself and your partner(s) as part of the Yale Patient Navigator Program
 - **Always include this statement at the end of your note:**
The patient verbally consents to allow Yale Patient Navigator Program (YPNP) navigators to view their electronic medical record (EMR), communicate with their medical and psychosocial team, document conversations within the EMR, schedule appointments, coordinate transportation, and contact them regarding other needs.
- Scroll all the way down and click “Sign Encounter” at the bottom