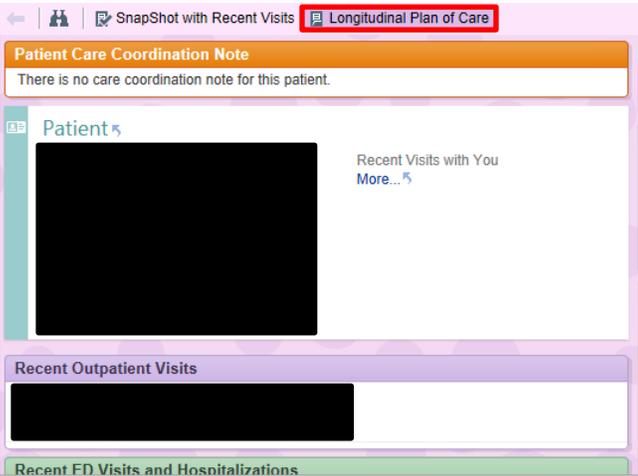| Standard Work Activity Sheet	Owner/Author: Lakeland Care Quality Team	Rev. Date: May 2017
Step: N/A **Purpose:** Describes process for including pre-visit chart review information in the daily schedule.	**Value Stream:** Pre-Visit Chart Reviews	

Seq. No	Task Description:	Key Point / Image / Measure (what good looks like)	Who
1.	Login to your office's department in Epic.		MA or Other
2.	Navigate to the "Schedule" screen and click the wrench button on the bottom right side of the screen.		MA or Other
3.	Click the magnifying glass and search "Longitudinal Plan of Care". Press the Enter key, and click "Accept" to wrench in the report.		MA or Other
4.	You should now see the Longitudinal Plan of Care next to the Snapshot with Recent Visits. Click that button to see this view of the patient's chart.		MA or Other
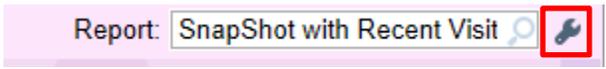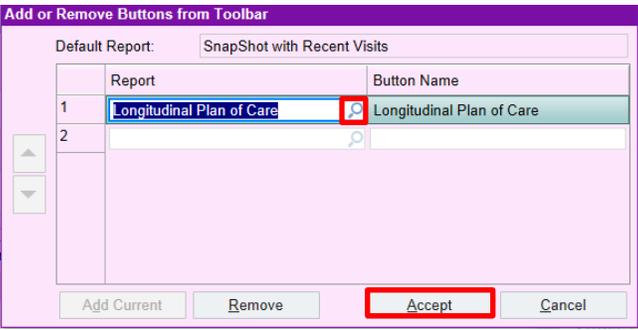
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	Standard Work Activity Sheet		Owner/Author: Lakeland Care Quality Team	Rev. Date: May 2017
Step: N/A	Purpose: Describes process for including pre-visit chart review information in the daily schedule.		Value Stream: Pre-Visit Chart Reviews	

Seq. No	Task Description:	Key Point / Image / Measure (what good looks like)	Who
5.	Review the patient's health maintenance dashboard. Check for any upcoming or overdue health maintenance topics that may need to be addressed during their visit. Next, review the "Labs" tab in the chart to ensure that the patient has completed their labs (if necessary).	Upcoming Health Maintenance Date Due TD Vaccine Adult — 2/11/1957 ZOSTER (SHINGLES) VACCINE — 2/11/1998 PNEUMOCOCCAL VACCINE 65 + (2 of 2 - PCV13) — 10/1/2016 INFLUENZA VACCINE (Season Ended) — 9/1/2017	MA or Other
6.	Once this is completed, navigate back to the "Schedule" view in Epic. With the correct patient highlighted, click the "Notes" button.	Schedule Open Slots Chart Order Review Enc Summary Print AVS No Show Notes Form Reprints	MA or Other
7.	In the box below the existing text, type "PVCR:" and enter the health maintenance topics that need to be addressed during that patient's visit. If the patient has not yet completed the necessary labs needed for their visit, follow up with them to ensure that they are completed before they come in. If all of the patient's health maintenance topics are fulfilled or up to date, type "PVCR: UTD" to indicate this. Click "OK" to save your notes.	Appointment Notes ✕ PVCR: TD, zoster, pneumococcal OK Undo Cancel	MA or Other
8.	The PVCR information should now populate in the schedule.	PROCEDURE PVCR: TD, zoster, pneumococcal Sch	MA or Other
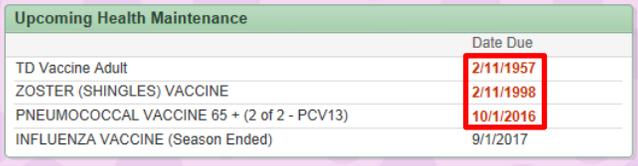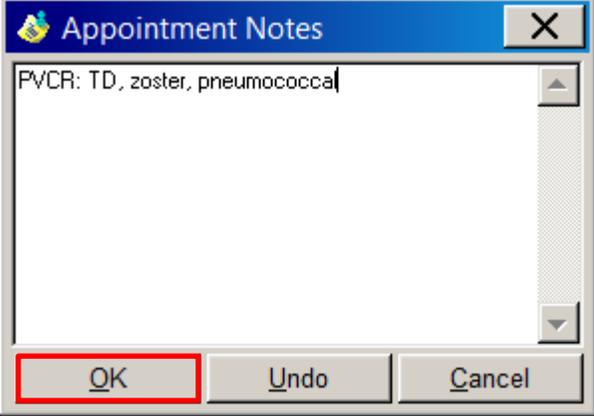
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