

Appendix C: Sample Learning Plan This is a sample of a visual aid that was provided to learner as a supplement to the tailored learning session, excluding “how-to” guides due to copyright.



Stanford Children's Health

Learning Plan One

Dr. XXX

- Part 1 – SmartPhrase Refinement/Speed Buttons
- Part 2 – Problem List Maintenance
- Part 3 – Preference List Composer/Editing Orders
- Part 4 – Chart Search
- Part 5 – Quick Hits

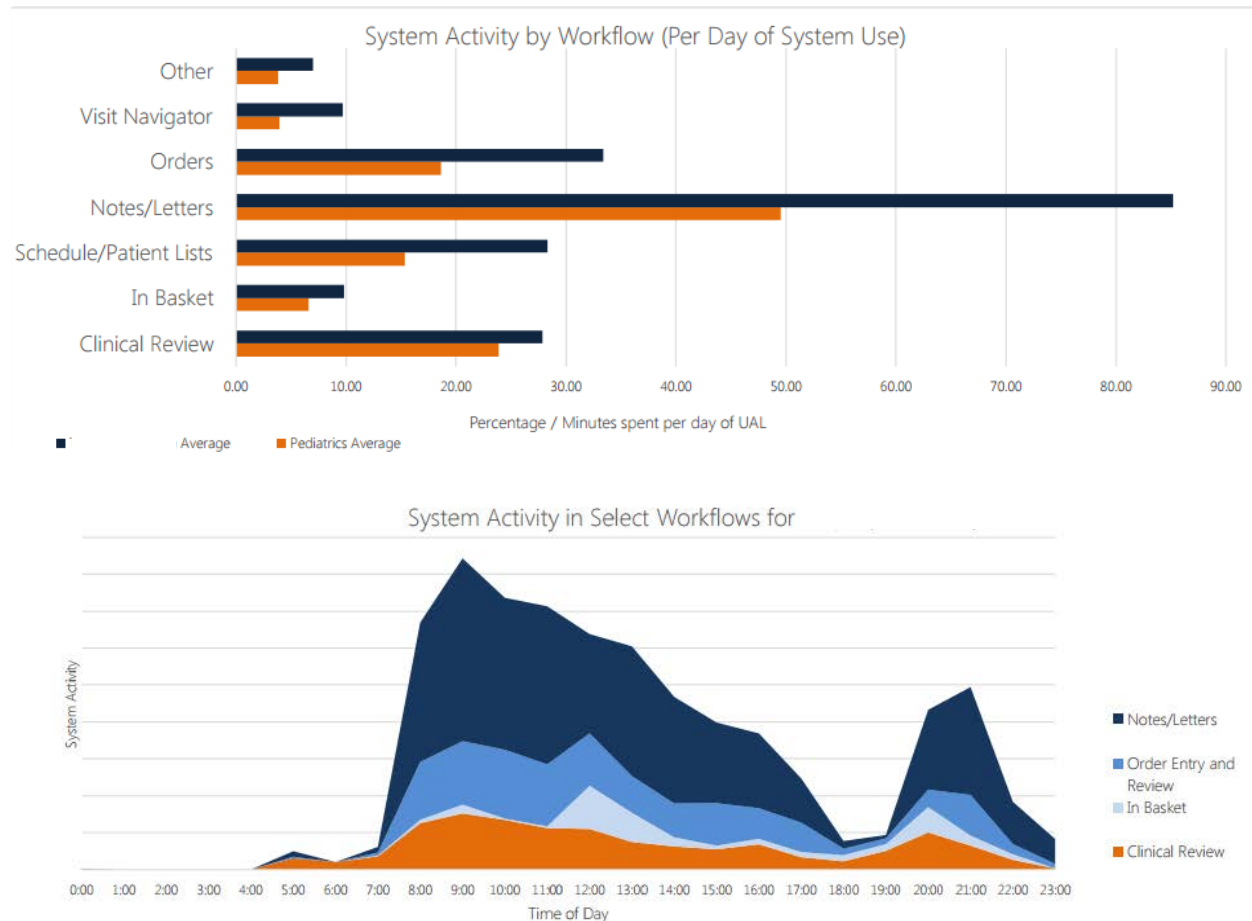
Dr. XXX– Home for Dinner (H4D) Individual Learning Plan

Thank you for taking part in the Home for Dinner program. By providing us with your survey responses and allowing us to observe you in clinic, we were able to take these two data sets and correlate them with our internal Epic usage statistics to tailor a learning session for you. The following information describes your individualized learning plan.

Strengths:

Your workflow is predictable, refined, and streamlined. We generally noted your comfort level with the system and technology as positive factors in your success.

Our data mined from the system shows your usage habits and shows your use of the system vs. your near peers. This is the visual representation of how Epic tracks your time in the system.



Opportunities:

It does appear that you spend a large amount of time outside clinic finishing your documentation. We noticed the following areas in which you can still make improvements:

1. **Smartphrase Refinement** – It appears that you generally have a good note template that works for you and that you use SmartPhrases to help you with patient instructions. It does seem that you spend the most of your time on writing notes. There are other links that you can pull into your notes which might help you save time as you’re seeing patients. You can also make smart buttons that can help you access your templates quickly.

2. **Problem List Maintenance** – You can keep your problem list updated with only the patients' active problems, and can easily file old ones to medical history. You can also quickly move diagnoses from the problem list to your visit diagnosis for that clinic. If you are interested, you can also keep track of your assessments and plans within the problem and easily pull it into your notes.
3. **Preference List Composer/Ordering** One of the biggest areas where you spend time in the system is consistently the dark blue "orders" so if we can shave off time in this area we will experience a large change in system use vs workload efficiency. We can help you hone your preference lists to make this easier. We also noticed that you could more efficiently edit multiple orders at once.
4. **Chart Search** is the technique to reduce the amount of time in the patient's chart. We recommend using the search function as well as thumbnail view of the media tab in order to make chart review the most efficient.
5. **Quick Hits** - There are a few other small things that may help you navigate the chart a little more efficiently, namely: using the specialty comments field to keep track of patient and family details to jog your memory before seeing a patient, taking photos with Haiku and embedding those images into your notes, and calculating weight change automatically in your note.