

Managing Open Encounters

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Accessing the Open Encounter report on Box

Open encounter reports are stored in a Box (<https://usfhealth.app.box.com>) folder named "Reports-Department Admins".

Report name is "SA500 Open & Cosign Encounters.xlsx". This report includes a summary for all departments and tabs for each department's open encounters.

Report run frequency

The SA500 Open & Cosign Encounters report and accompanying department-specific reports are manually refreshed 1-2 times per week. Data in the report will always be at least 1 day behind, as the Epic reporting system ("Clarity" in Epic-lingo) refreshes from the Epic production database overnight daily. If the most current version of the report is at least 3 days old and you'd like a refresh, please request from epicsupport@health.usf.edu

Department-specific reports

check the subfolder "Depts-Open & Cosign Enc" for spreadsheets for each department's data. These spreadsheets are provided as a convenience and include data identical to the department-specific tabs in the SA500 Open & Cosign Encounters report.

Requesting Access

Access to this folder is not automatic, but can be requested from support@health.usf.edu.

Box Apps (add-ins)

Visit Box's Apps page (<https://usfhealth.app.box.com/apps>) for helpful add-ins like Box Sync and Box Drive.

Can't find encounter in patient's chart

Encounters of certain types (e.g., appointments) are hidden from the initial display in chart review. Uncheck "Default Filter" to display all encounters for the patient.

Chart Review (Last refresh: 11:55:06 AM)

Filters
 Text Search
 Preview
 Refresh
 Select

Encounters | Labs | Imaging | Procedures | Other Orders

3 records match filters, all records loaded

Filters: Default filter

	Date	Type	Department
	06/15/2012	Office Visit	EMC FM
	06/14/2012	Office Visit	EMC FM

Changing the provider listed for an encounter

For scheduled visits

From the schedule, highlight the visit and select "Change Prov". You may not be able to change providers on visits more than 3 days old. If so, please send the visit information to epicsupport@health.usf.edu and the Epic support team will update the provider.

Epic Patient Lookup | Remind Me | Personalize | Patient Lists | View Sched | Dept Appts

Schedule

Open Slots | Chart | Show Orders | Order Entry | Enc Summary | Sign Encounter | Print AVS | **Change**

7/7/2017 Today

July 2017						
Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Dept: USFH STC PEDS MED SC2

+ Create

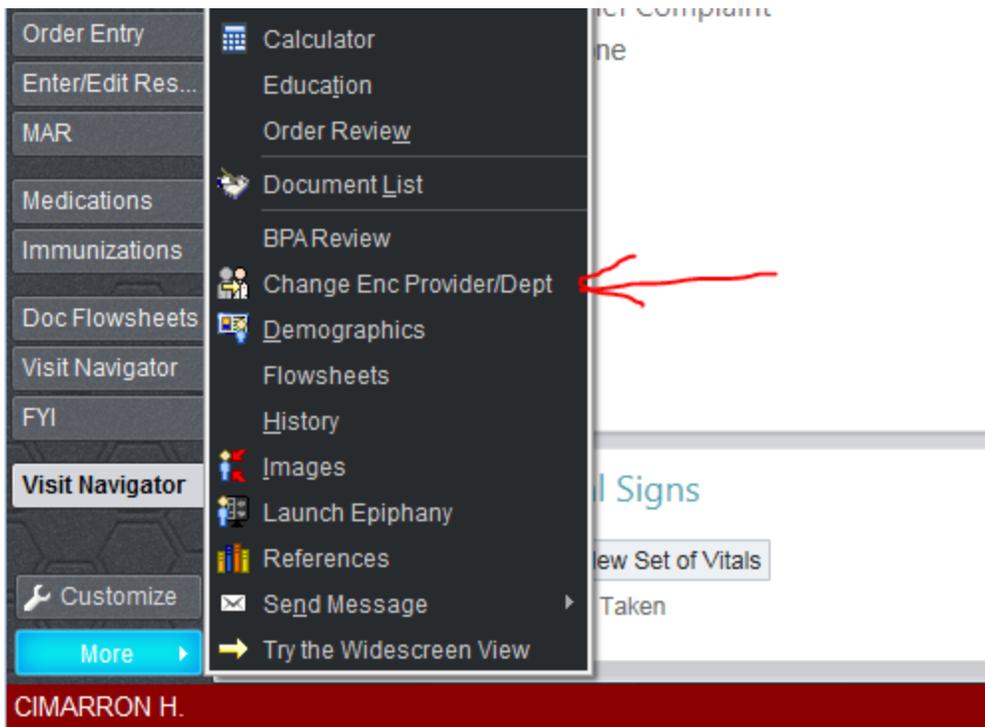
- My Schedule
- USFH STC PEDS MED SC2

STC CLINIC ALL						
Time	Sex	DC	Provider	Type		
9:20 AM	F	8...	Nathan Brinn, MD	USF ESTABLISHED PATIENT VISIT		
9:20 AM	F	9...	Dayhanara Pena, ARNP	USF NURSE VISIT		
9:40 AM	F	5...	Nathan Brinn, MD	USF ESTABLISHED PATIENT VISIT		
9:40 AM	F	8...	Nathan Brinn, MD	USF NEW PATIENT VISIT		
9:40 AM	F	7...	Dayhanara Pena ARNP	USF NURSE VISIT		

For non-scheduled visits (e.g., those generated from the "Create Encounter" button).

- Find the visit using the "Encounter" button, which is typically located in the Epic>Patient Care menu (or search using the upper right search box).
- in the "More" menu (or via search box), select "Change Enc Provider/Dept"

You may be prevented from changing providers on certain older visits. If so, please send the visit information to epicsupport@health.usf.edu and the Epic support team will update the provider.



Closing old encounters without documentation

The suggested language (legal reviewing) for a progress note is "Patient was seen in our facility, but no documentation exists to indicate services provided" Use LOS "99999 No Charge" and diagnosis "Diagnosis Unknown".

Closing encounters for dates of service greater than 60 days, will cause a HUGE back up in RCO with timely filing edits, unless the LOS is designated as 99999.

PIO - Jamie Sotelo 2017-06-23

See [documentation policy](#) for additional information.

Closing encounters for providers no longer with USF

If a Fellow/Resident or other trainee created a note but it was not finalized/closed by the supervising provider, the service should be cosigned and LOS= 99999.

If a credentialed provider created a note and didn't finalize/sign prior to leaving, the Department should designate another credentialed provider to close these encounters. In the past, some physicians have used language such as "Due to Dr. Jones' departure from the practice, this note was finalized without examination of the patient/review of the chart". Use LOS=99999.

If the encounter is closed, but needs to be assigned to a different cosigner, see [Assign a different cosigner for a visit](#)

Do not change the billing provider to a current USF physician when using any LOS other than 99999. Doing so would result in a fraudulent claim.

PIO - Jamie Sotelo 2017-06-23

See [documentation policy](#) for additional information.

Common error messages

"This type of encounter cannot be closed" or "You lack security to close this visit"

Generally appears when attempting to close an "Appointment" encounter when no additional documentation has been added to the visit. Add a chief complaint, diagnosis, note, or LOS and this error should no longer appear.

Cosigning encounters

If the "Cosign Needed By" column is populated for a visit, the person listed should have a cosign in the "Cosign - Chart" folder of their In Basket.

Assign a different cosigner for a visit

If the wrong person or provider is listed as the cosigner, send a request to epicsupport@health.usf.edu with the MRN, DOS, the person currently listed as the cosigner, and to whom the cosign should be reassigned. If the listed cosigner is a provider who has since left the organization, see [Closing encounters for providers no longer with USF](#).

Documentation Policy

[USF Documentation Policy.pdf](#)

How can I tell if an encounter is closed in Epic Chart Review?

When an encounter is closed, you should see a line in the Chart Review, Encounter tab report for the encounter that looks like:

Electronically signed by _____ on _____

What encounters are included on the report

In general, any encounter scheduled at a USF clinic that is or could be billable are included on the report if the encounter is not closed and cosigned (if required).

Excluded are:

- Research visits scheduled with the USF STUDY VISIT visit type
- Lab, Radiology, ASC, and Executive Health visits
- No show and cancelled appointments
- Non-scheduled encounters with the exception of "Billing Encounter" and "Charges Only" encounters

As of 6/21/17, encounters created since USF's Epic go-live (8/1/15) are included. Previously, encounters were suppressed from the report at 1 year. The following note was included with the 6/21/17 report refresh:

"-adjusted timeframe to be consistent with reports recently sent to Chairs & Administrators by Dr. van Loveren, Rich Sobieray, and Dr. Moseley. Includes all open encounters from Epic go-live (8/1/15) forward."

What is required to close an encounter

Typically, five types of information are required to close an encounter:

Chief Complaint (reason for visit)

When closing old encounters where the reason for visit isn't known, use "Other". You'll be prompted to create your own description such as "Unknown".

Diagnosis

When closing old encounters where the visit diagnosis isn't known, use "Diagnosis Unknown".

Level of Service (LOS)

When closing old encounters, use "No Charge", which corresponds to code 99999. Not required if charges entered in Charge Capture

Progress Note

See topics on closing old encounters or closing encounters for providers no longer with USF as appropriate.

Charges (Charge Capture)

Not required if LOS entered for encounter. Make sure to select the "No Filter" option to display charges entered more than 7 days ago.

Why does the report show more encounters than the provider's "My Open Charts" In Basket folder?

The discrepancy btw the number of encounters for a provider on the report and in their "My Open Charts" In Basket folder is due either to required [cosigns](#) or "Appointment" visits that have no charting on them yet. If a patient is checked in and nobody charts on them, they won't show up in the In Basket (we've tried to change this but can't—it's just how Epic works). To find Appointment encounters, the provider either needs to look back thru their schedule or work from the report shared in Box (some departments slice the report by provider and email or print).