Quick Start Guide

(Saddleback Memorial Medical Center)

Logging on to Epic

1. If necessary, open the Epic Hyperspace logon screen.
2. In the *User ID* field, type your user ID.
3. In the *Password* field, type your password.
4. Click **OK**.
5. **If the department you wish to log on to displays in the *Department* field,** go to the next step.

   If the department you wish to log on to is not displayed in the *Department* field, click the *ellipsis button* (...). The *Record Select* dialog box opens. Select the desired department, then click **Accept**.
6. In the *Department* log on screen, click **OK**. The main screen for your assigned user role and department displays.

Viewing / Updating Demographic Information

1. Make sure you are logged on to Epic.
2. Open the desired patient's chart.
3. In the Activity List, click **Demographics**. The various Demographics tabs display.
4. Click the desired tab(s).

If making changes, click the *ellipsis button* (...) to access additional selections.

- **General Demographics** tab: The *Confidential Address* information should not be given to anyone requesting contact information about the patient.
- **Clinical Information** tab: Select the *Restricted Access* check box if the patient's name should only display on patients lists and reports for users who have access to restricted patients. Select the *Chart abstracted* check box if all or part of the patient's chart has been transferred to Epic.

NOTE: You must have user rights to update demographic information.

Information Services Help Desk
Ext. 39450

Logging off of Epic

To log off of Epic, click the **Log Out** button in the toolbar.

Securing Epic:

Epic allows you to secure your work station and run tasks until another user logs in. This enables you to leave your workstation, if necessary, while your tasks are running. This is useful when producing reports.

To secure Epic, click the **Log Out** drop-down arrow, and then click **Secure**. To log back on to Epic and resume the tasks you were working on, log on to Epic again.

Viewing Reports

The *Reports* toolbar contains custom button shortcuts that allow you to easily access reports, simply by clicking the button shortcut.

1. Click the *ellipsis button* (...). The *Record Select* dialog box opens.
2. Click the report that you want to view.
3. Click **Select**. The report you selected is now displayed.

Creating Button Shortcuts

To add a button shortcut, do one of the following:

- To add a button shortcut for the currently displayed report, click the **plus** icon. A button shortcut for the report is added.
- To add a button shortcut for a report that is not currently displayed:
  1. Click the **wrench** icon. The *Add/Remove Reports* dialog box opens.
  2. Place the cursor in a blank line. An *ellipsis button* (...) is visible.
  3. Click the *ellipsis button* (...). The *Record Select* dialog box opens.
  4. Select the desired report, and then click **Accept**. The *Report* column is the actual name of the report that is in the system, and it cannot be edited. The *Display Name* column is the name that displays on the button shortcut and can be edited.
  5. If you choose to change a display name, click the display name and type the new name.
  6. To change the order of how the button shortcuts display, use the arrow buttons.
  7. Click **Accept**.