

Clinical Support Staff Epic Setup

Tabs Setup

The order of the tabs can be moved by clicking on the tab and dragging it into place.

Tab Order (drag to move tab order)

Snapshot
Rooming
Growth Chart
Immunizations
Health Maintenance
Flowsheet
Review Flowsheet
Enter/Edit
Chart Review
Notes
Plan
Communications
Wrap-Up
Programs

Rooming Tab Setup

The column order can be changed by clicking on the wrench in the right-hand corner of the screen and dragging the column header names into the correct order.

Columns Order

Programs
Quick Questions – Mandatory
Chief Complaint
Vitals
Hearing/Vision
History
SOGI
Allergies
Med Documentation
Med Management
UDS
Care Teams
Screening
Pt. Questionnaires

Chief Complaint Setup

To setup the speed buttons, search for the diagnosis and click accept.

Adults

Back Pain

Diabetes Mellitus

Headache

Hypertension

Obesity

URI symptoms

COPD

Children

Well Child

URI symptoms

Headache

Asthma

Immunizations

UDS Tab

Staff Scripting

“Carolina Family Health Centers is a federally qualified health center, we are required to ask patients about their backgrounds. The information is used to help determine if you are eligible for special programs and to help us develop programs to meet our patient’s needs.”

Migrant Status

1. In the past 24 months, have you worked in agriculture (e.g., picking fruit or planting or harvesting crops) or retired from working in agriculture?
 - a. If yes, question #2
 - b. If no, stop. The patient is not a migrant farmworker.
2. Have you had to setup a temporary home for such employment?
 - a. If yes, the patient is considered a migrant farmworker. All dependents are also considered **migrant farmworkers**.
 - b. If no, the patient is considered a **seasonal farmworker**.

Homelessness

1. Any time since the first of the year, have you experienced homelessness? Examples may include living in a shelter or transitional housing, living out of your car, or staying with a friend or relative to prevent being homeless.
 - a. If yes, mark the patient as **homeless**.
 - b. If no, the patient is not homeless.

If the patient is homeless, encourage them to speak to their provider and the provider can provide a list of resources to assist with housing or make a referral to a case manager.

Veterans Status

1. Have you serviced in active military, naval, or air services (Air Force, Coast Guard, Marines, Navy, Space Force, or commissioned officer of the Public Health Service or National Oceanic and Atmospheric Administration)?
 - a. If yes, mark as a **Veteran**
 - b. If no, the patient is not a Veteran

Provider Schedule Setup

Go to cog wheel to make changes to the column order of the provider schedule. Each provider schedule will have to be set up.

Adults **Columns Order**

Appt Time
Visit Type
Status
MRN
Patient (Name, Age, Photo)
DOB
Notes
Annual Depression Screening HM Status
Is Patient Diabetic
Last A1C Value
Last A1C Date
CRC HM Status
Breast Cancer Screen HM Status
CCS Status
Patient FYIs (list)
Primary Coverage Payor
Secondary Coverage

Pediatrics **Columns Order**

Appt Time
Visit Type
Status
MRN
Patient (Name, Age, Photo)
DOB
Ages in months
Legal Guardian
Notes
Last Wellness Visit Date
Next Well Child Visit
Last M-CHAT
Annual Depression Screening HM Screening
SDH Number or SDH date??
POC Tests
Primary Coverage Payor
Immunizations (Given Today)

Key Points to Remember when Asking SOGI Questions

- Explain why you are asking: Briefly state that you are collecting this information to better understand and serve your community or provide appropriate care.
- Use inclusive language: Offer a range of options including "other" or "prefer not to say" to allow for diverse identities.
- Ask about pronouns first: This shows respect and allows you to use the correct pronouns throughout the conversation.
- Separate gender identity and sexual orientation: Treat these as distinct concepts when asking questions.
- Respect privacy: Assure individuals that their responses are confidential.
- Be prepared to explain terms: If someone is unfamiliar with a term, be ready to provide a simple definition.
- Be prepared to encounter confusion or disdain about the questions and use the following responses:
 - Let's look at the options on the screen together.
 - We are asking these questions of all of our patients.
 - We want to avoid assumptions about our patients.
 - We want to be respectful in addressing all our patients.
 - It is important for us to gather this demographic data.

SOGI Definitions

All patients 16 and older need to have their sexual orientation and gender identity documented. This will be done by the clinical support staff upon rooming the patient.

GENDER IDENTITY

Gender identity

Noun: the internal perception of one's gender, and how they label themselves, based on how much they align or don't align with what they understand their options for gender to be. Often conflated with biological sex, or sex assigned at birth.

Cisgender

/"siss-jendur"/ - adj.: a gender description for when someone's sex assigned at birth and gender identity correspond in the expected way (e.g., someone who was assigned male at birth, and identified as a man). A simple way to think about it is if a person is not transgender, they are cisgender. The word cisgender can also be shorted to "cis".

Transgender

1 *adj.*: a gender description for someone who has transition (Or is transitioning) from living as one gender to another. **2** *adj.*: an umbrella term for someone whose sex assigned at birth and gender identity do not correspond in the expected way (e.g., someone who was assigned male at birth, but does not identify as a man).

Non-binary/Queer

1 *adj.* : an umbrella term to describe individuals who don't identify as straight and/or cisgender. **2** *noun* : a slur used to refer to someone who isn't straight and/or cisgender. Due to its historical use as a derogatory term, and how it is still used as a slur in many communities, it is not embraced or used by all LGBTQ people. The term "queer" can often be use interchangeably with LGBTQ (e.g., "queer people" instead of "LGBTQ people").

Biological sex (male or female)

Noun : a medical term used to refer to the chromosomal, hormonal and anatomical characteristics that are used to classify an individual as female or male or intersex. Often referred to as simply "sex," "physical sex," "anatomical sex," or specifically as "sex assigned at birth."

SEXUALITY

Sexual Orientation

Noun : the type of sexual, romantic, emotional/spiritual attraction one has the capacity to feel for some others, generally labeled based on the gender relationship between the person and the people they are attracted to. Often confused with sexual preference.

Heterosexual/Straight

adj. : experiencing attraction solely (or primarily) to some members of a different gender.

Homosexual

Adj & Noun: a person primarily emotionally, physically, and/or sexually attracted to members of the same sex/gender. This [medical] term is considered stigmatizing (particularly as a noun) due to its history as a category of mental illness, and is discouraged for common use (use gay or lesbian instead)

Pansexual

adj. : a person who experiences sexual, romantic, physical, and/or spiritual attraction for members of all gender identities/expressions. Often shortened to “pan.”

Bisexual

Noun & adj. : a person who experiences attraction to some people of their gender and another gender. Bisexual attraction does not have to be equally split, or indicate a level of interest that is the same across the genders an individual may be attracted to. Often used interchangeably with “pansexual”.

Lesbian

Noun & adj. : women who are primarily attracted romantically, erotically, and/or emotionally to other women.

Gay

1 *adj.* : experiencing attraction solely (or primarily) to some members of the same gender. Can be used to refer to men who are attracted to other men and women who are attracted to women. **2** *adj.* : an umbrella term used to refer to the queer community as a whole, or as an individual identity label for anyone who is not straight. (see **LGBTQ** and **queer**)