

Provider Moves in Epic

Departing, transitioning, and transferring providers in Epic

Certain steps need to be taken by program directors, clinic managers and/or administrators to ensure the continuity of care for our patients. The scenarios below focus on providers that are leaving the organization and providers that are transitioning to different departments or roles within Johns Hopkins Medicine. Program Director/Administrator need to complete steps to ensure the provider record is updated appropriately in Epic.



Try It Out- Departing Providers in Epic

1. File an Epic Help Desk ticket directed to the Cadence team with the following information:
 - Departing provider full name and JHED ID
 - Departure date
 - Departing Epic department
2. Create an Out of Contact Occasion (OCO) with covering providers set as delegates. OCO's should also be utilized when a provider is out for longer than three days. ([Link to Tip Sheet on In Basket Out of Contact](#))
3. Remove the outgoing provider from your department's **Resident/Fellow Pool** ([Link to Tip Sheet on Checking In and Out of Pools](#))
4. Make sure provider has addressed and closed all open encounters and In Basket messages before their planned departure.
5. Make sure there is a template end date equal to the date the provider is no longer seeing patients. Delete any future scheduling templates for your department.
6. Reschedule all appointments to covering provider.
7. Once ALL of the above steps have been completed and the provider's last workday has arrived, remove the provider from the department by entering a Clear Cut ticket (SER001 – Update a Provider's Outpatient Departments). *Do not enter the Clear Cut ticket before the provider's last day, as it will take effect immediately when the ticket is processed.* You can get to Clear Cut from the Epic Help menu, or at the following link:
<https://mrpccut1.hosts.jhmi.edu>.



Try It Out- Transitioning/Transferring Providers in Epic

1. File an Epic Help Desk ticket directed to the Cadence team with the following information:
 - Transitioning provider full name and JHED ID
 - Transition date
 - Transfer To and From Epic department
2. Remove the outgoing provider from your department's Resident/Fellow Pool ([Link to Tip Sheet on Checking In and Out of Pools](#))

3. Make sure provider addressed all current In Basket messages prior to transfer.
4. Receiving department to add provider to appropriate In Basket pools.
5. Set template end date in the outgoing department.
6. Receiving department to set up scheduling template if needed.
7. Make sure provider has closed all open encounters before their transfer.
8. Once ALL of the above steps have been completed and the provider's last workday has arrived, remove the provider from the department by entering a Clear Cut ticket (SER001 – Update a Provider's Outpatient Departments). *Do not enter the Clear Cut ticket before the provider's last day, because it will take effect immediately when the ticket is processed.* You can get to Clear Cut from the Epic Help menu, or at the following link:
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