

Managing the EHR Inbox: Student Guide

Please be sure to complete the [online evaluation](#) after your simulation session!

The **purpose** of this simulation is for students to practice prioritizing and responding to EHR inbox messages. Responding to messages and seeking provider input when appropriate is an important part of ambulatory care nursing that is likely unfamiliar to learners more accustomed to inpatient care.

Learning Objectives

By the end of this simulation-based experience, the learner will be able to...

1. Describe the role of the nurse in managing and responding to patient messages received through electronic communication.
 2. Prioritize patient messages using the triage principles and the nursing process to emphasize patient safety.
 3. Formulate typed and verbal responses to patients' electronic communications that are clear, sensitive, and specific.
 4. Document nursing care provided through EHR contact, with telephone or electronic follow-up, using a standardized charting approach.
 5. Provide a clear and succinct report to an interprofessional healthcare worker using the SBAR format.
-

Expectations

Learners are expected to arrive at the simulation session in professional attire and having (1) fully reviewed this student guide, (2) completed the assigned readings and videos, and (3) answered the pre-simulation questions, which will be discussed at debriefing, and (4) have the SOAP Note Template available to use in class.

Students will attend an in-person or video conference session, in which the facilitator will guide the learners through a simulation in which you will discuss the simulated EHR Inbox messages that you reviewed and prioritized prior to the lab session. You will practice responding to the patient by telephone, documenting care using the SOAP format, and giving an SBAR report to another health professional.

You should spend about 1.5-2 hours preparing for this simulation before the Zoom session. During your simulation lab, the briefing, scenario, and debriefing for this simulation will take about 90 minutes.

Topics

- Triage decision-making pertaining to inbox patient messages
 - SBAR report to a provider
 - SOAP note documentation
 - Responding to patient messages verbally or in writing
-

Preparation (Readings and Videos)

Learning Module - This online module provides an overview of the RN role and responsibilities in EHR Inbox management and documentation. The module is available at the website linked below. Complete the module before doing the at-home portion of the simulation.

- Lopez, L. (2020). *The electronic health record and inbox management in ambulatory care: Documentation, telephone triage, and team communication* [online learning module]. Center for Health Sciences Interprofessional Education, Research, and Practice. https://s3.us-west-2.amazonaws.com/collaborate.uw.edu/AC_Modules/EHR_in_ambulatory_care_APR_2021/story.html. This online module provides an overview of the RN role and responsibilities in EHR Inbox management.

At-home simulation activity - Launch the module below in your web browser to engage in an activity in which you will review EHR Inbox messages, prioritize your responses, and review chart information.

- Lopez, L. (2020). Ambulatory care EHR inbox simulation - part 1 [online simulation-based activity]. Center for Health Sciences Interprofessional Education, Research, and Practice. https://s3.us-west-2.amazonaws.com/collaborate.uw.edu/AC_Modules/Inbox_Simulation_Part_1_Lopez/story.html

Readings - You will be expected to practice SBAR and SOAP communication during the lab session. Review the following documents in preparation, and bring these to use during the simulation session

- Institute for Healthcare Improvement. (2017). [SBAR: Situation-background-assessment-response](#) (requires login, free registration). Use this document to review what should be included in the SBAR.
- SOAP Note Template (separate PDF document)

Optional SBAR Refreshers:

- Toronto Rehabilitation Institute. (2010 September 7). *No SBAR: Ineffective communication* [Video]. YouTube. <https://www.youtube.com/watch?v=CtdNQ-sfKg8>
- Toronto Rehabilitation Institute. (2010 September 7). *SBAR: Effective communication* [Video]. YouTube. <https://www.youtube.com/watch?v=fsazEArBy2g>
- Institute for Healthcare Improvement. (n.d.). *SBAR toolkit: Situation-background-assessment-response*. <http://www.ihl.org/resources/Pages/Tools/sbartoolkit.aspx>

Pre-simulation Questions

The Pre-simulation Questions are intended to help you begin to integrate understanding from your readings and the simulations, and prepare you for a productive debriefing session. Each question addresses the corresponding learning objective.

1. What is your role, as an RN, in managing and responding to patient messages received through electronic communication?
2. What guidelines would you use to decide on the priority of messages - that is, how do you decide which messages are emergent, urgent, or non-urgent? What sources of information would you use?
3. What would be your next steps in addressing the needs of the top-priority patient from the pre-lab portion of the simulation?

Instructions: The following questions refer to the EHR Inbox messages.

4. What priority would you assign each patient (high = urgent/emergent; medium = respond today; low = not time-sensitive, respond within 1-2 days)

Patient	Priority (check one)		
Aiesha Washington	<input type="checkbox"/> High	<input type="checkbox"/> Medium	<input type="checkbox"/> Low
Bruce Kowalczyk	<input type="checkbox"/> High	<input type="checkbox"/> Medium	<input type="checkbox"/> Low
Damon Mays	<input type="checkbox"/> High	<input type="checkbox"/> Medium	<input type="checkbox"/> Low

5. Select the patient you consider the top priority. You are going to tell the provider about the patient right away. Write your SBAR.
 6. Select a patient you have categorized as medium or low priority. Compose a response e-mail.
-

SOAP Note Template

S Subjective	
O Objective	
A Assessment	
P Plan	

Name:	
Date/Time:	

Utilized Telephone Triage Protocol Resource: Briggs, Julie. 2016. Telephone Triage Protocols for Nurses Fifth Edition.

Protocol.

Page:

Route note to PCP upon signing: <input checked="" type="checkbox"/>
Routing Comments:
Set follow up reminder in <input type="text"/> days

©Laura Lopez, 2020

