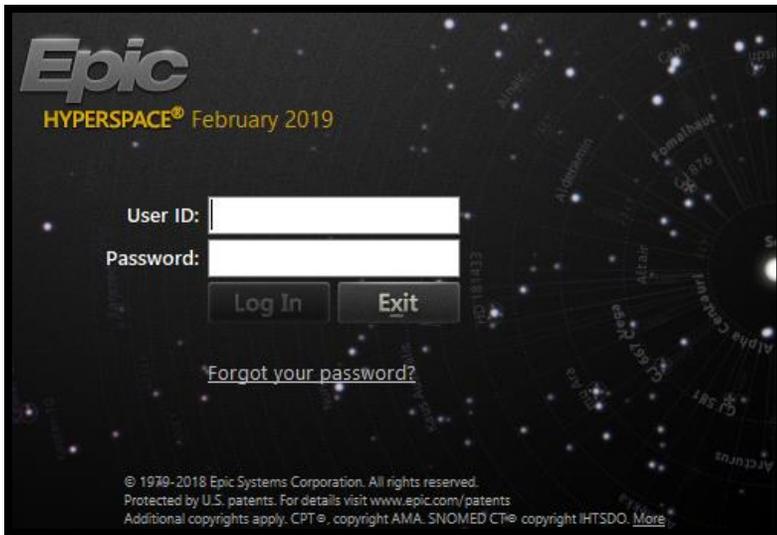# APP Student Documentation in a Clinic

This tip sheet will guide advance practice providers through the steps of documenting a note in an ambulatory setting.
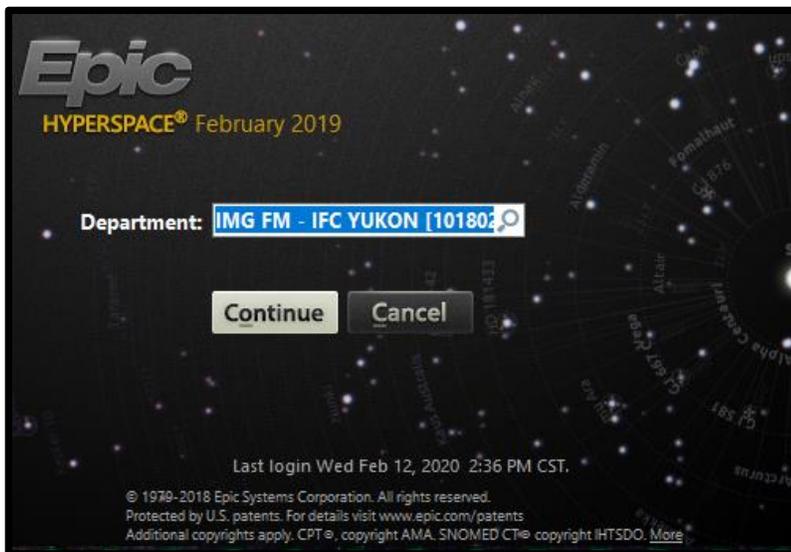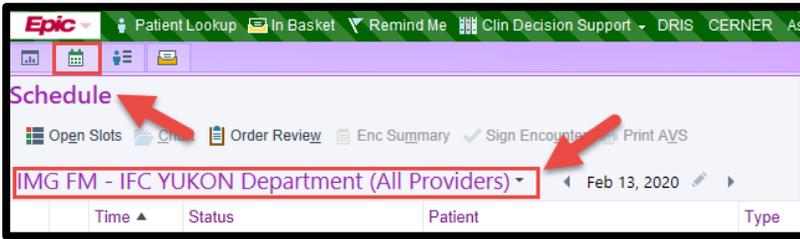
Try It Out

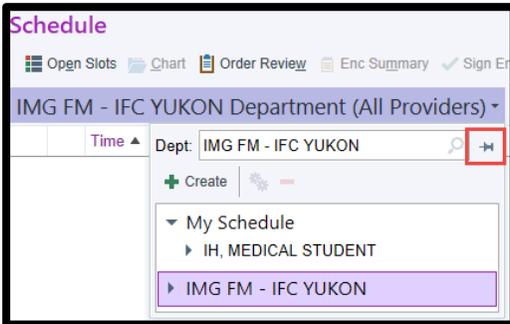1. Log in to Epic with your user name and password.

2. Choose your log in department. This will be the same as the department for your preceptor.
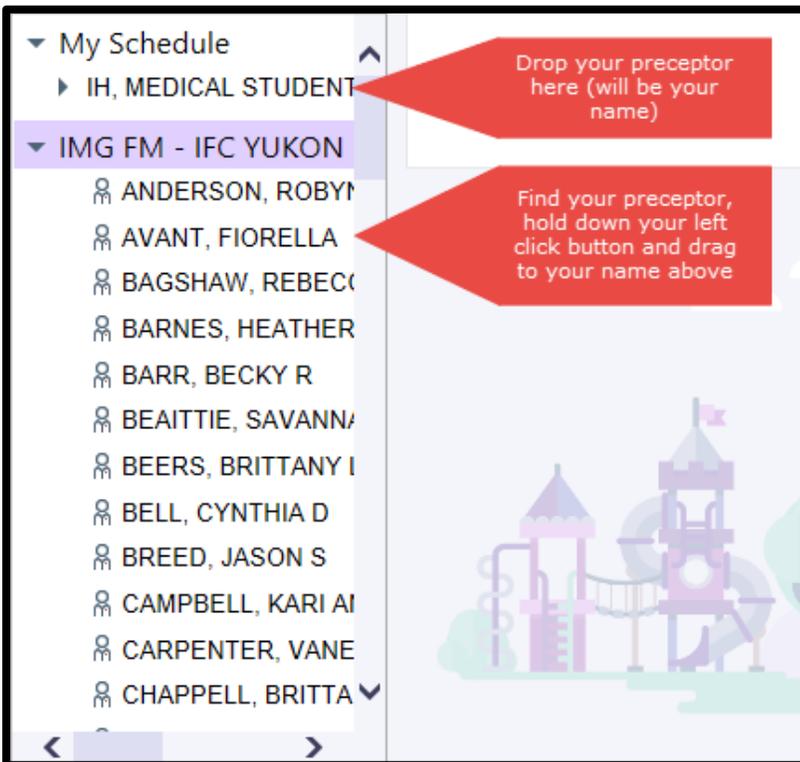
3. Click on the **Schedule** startup activity. Then click on the Department Schedule header.
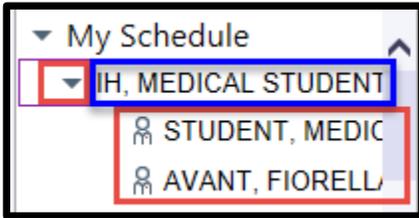

4. Click the **pushpin** to "pin" your schedule tree and calendar.

5. Click the **drop-down arrow** next to the department. Find your preceptor's name, click and hold down while you drag their name up to your name, then release the button to drop the preceptor into your schedule.
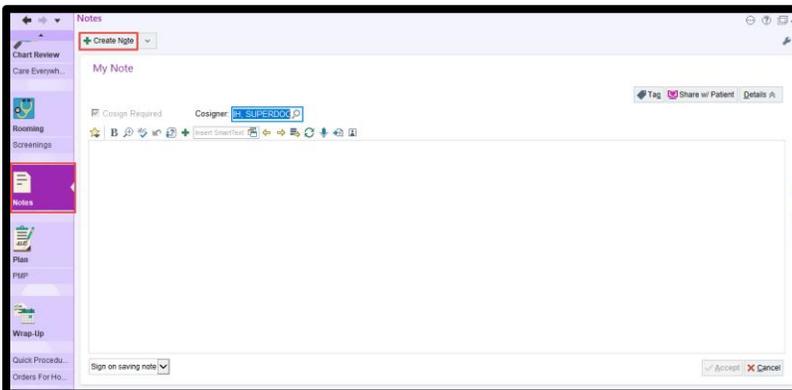
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6. Your schedule should now include your name and your preceptor when you click on the down arrow next to your name (red boxes below). Now click on your schedule (in blue box in the screenshot below) and you should see your preceptor's patient schedule.

7. Find the patient you are wanting in the schedule and double click on them. This puts you in the patient's encounter.

8. In the Activity tabs on the left side of your screen, click the **Notes** tab. Inside the Notes activity, select **Create Note**.
9.

10. Bring in the note template you wish to use by clicking on the **Butler** in the toolbar at the top of the note. This opens the Butler pop up box. You may need to click refresh (the first time you do this) to pull in the note templates (called SmartPhrases) your preceptor shared. Then single click on the SmartPhrase you want to pull in and click the **Add and Close** button.

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11. Enter the name of your preceptor in the **Cosigner** field.
12. SmartLinks will populate into the note. These links pull documented information from the patient's chart into the note. Navigate through the note by placing your cursor at the top of the note and selecting the **F2** button on your keyboard. This will take you to each editable area of your note. If you are taken to a wild card (*******) you will need to free text the field or delete the wild card. When you are taken to a SmartList you will see a list of options to choose from. A blue background signifies multiple select, a yellow background is single select. Make your selection with a left click of the mouse, follow immediately with a right click to place the selection in the note. Continue using the **F2** key to navigate through the note.
13. Once all wild cards and editable areas have been addressed, **Accept** the note. The note will then be routed to your preceptor's In Basket for attestation.

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