

# EpicEdge Tips & Tricks

## Documentation of IV Lines

There are multiple parts to document an IV Line correctly:

- **In Rover:** Add the Line, document properties and assessment.
- **In Remote Client:** Add the Wound Form, to show on all future visits.
- **In Remote Client:** Add the Catheter-IV Form and complete full documentation on the Correct Catheter-IV form. Make sure to add to all future visits.
- **Under the Skills Nursing Template:** Add and Modify
  - **Learning/Teaching Needs – IV Therapy** care plan to be patient-specific.
  - **Specimen Sample** care plan if lab draws are ordered.

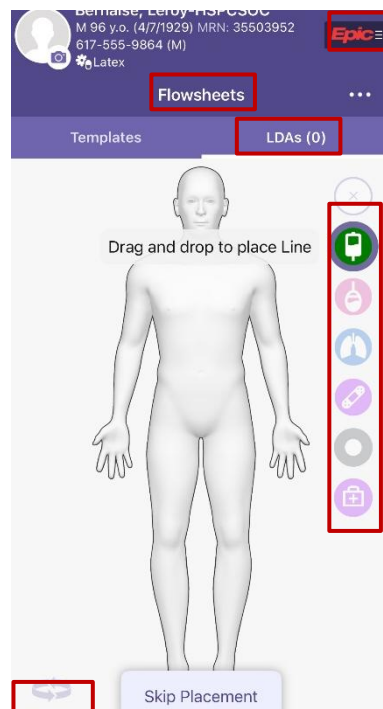
### 1. ROVER: Add the Line, document properties and assessment

You must add the line to the **LDA avatar** and document the assessment in **Rover**. It is best practice to begin documentation in Rover, as lines cannot be added to the LDA avatar in Remote Client. Rover is also the location where hospital-documented LDAs can be imported.

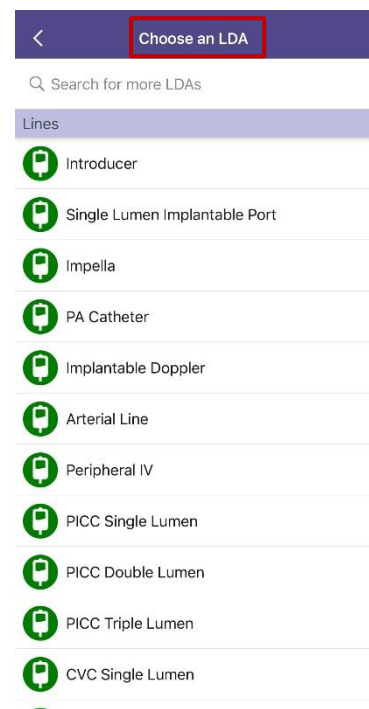
#### Steps:

1. After starting your visit in Rover and opening the visit for the appropriate patient, select the **Epic** button, then choose **Flowsheets**, and click **LDAs**.

2. When the avatar appears, click the **plus (+) icon** to view the available LDA options. Select **Lines**, then drag and place the line in the appropriate location on the avatar. You can turn the avatar if needed.

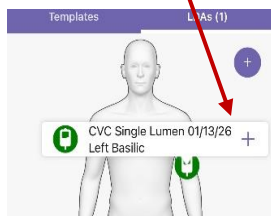


3. Choose the correct LDAs.



4. After the selecting the correct line, complete the Line Properties to finish adding it and click the back arrow.

5. After completing, you will see the Line on the avatar. Click on **plus (+) icon** to document the Line assessment.



**Adding LDA**

CVC Single Lumen

Placement Date: 1/13/26

Placement Time: 15:38

Earliest Known Present: Tap to enter data

Placed by External Staff?: Tap to enter data

Hand Hygiene Performed Prior to CVC Insertion: Tap to enter data

Consent Obtained: Tap to enter data

Site Prep: Tap to enter data

Site Prep Agent has Completely Dried Before Insertion: Tap to enter data

All 5 Sterile Barriers Used (Gloves, Gown, Cap, Mask, Large Sterile Drape): Tap to enter data

Medical Reason for Not Performing Maximal: Tap to enter data

6. Make sure to complete all of the assessment documentation.

**LDA**

CVC Single Lumen 01/14/26 Left Basilic Edit >

Site Assessment: Tap to enter data

Lumen Status: Tap to enter data

Line Care: Tap to enter data

Length mark (cm): Tap to enter data

Dressing Type: Tap to enter data

Dressing Status: Tap to enter data

Dressing Intervention: Tap to enter data

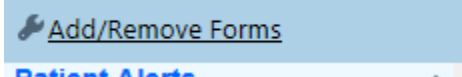
Dressing Change Due: Tap to enter data

Cap Change Due: Tap to enter data

## 2. REMOTE CLIENT: Add the Wound Form

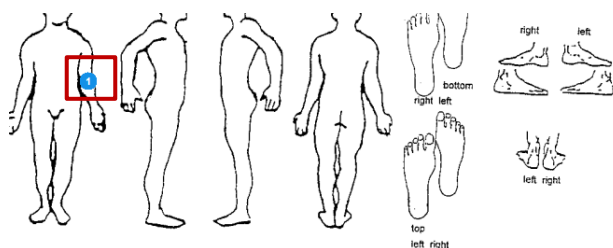
You must add the **Wound Form** in Remote Client to see the LDAs in Remote Client.

1. Within an open visit, click Add/Remove Forms at the top of the Form Navigator Section on the left.



2. Here you see a list of all available forms.
  - a. The dark grey forms are required for that visit and already in the forms list.
  - b. The light grey are the forms you can choose from.
  - c. The blue are the selected forms, you just clicked on.
3. Select the **Wound Form**.
4. Choose **Yes** to indicate you would like to **Add the form to all Future Visits**.

**Note:** If you documented the assessment in Rover using the LDA Flowsheets, you do not need to document it again. After syncing, the documentation will automatically appear in Remote Client. If you don't see it, sync again.



Double-click the body picture to document a new wound.

Show: ☐ Resolved ☐ Made in Error

Type	Start	Status	Assessment
CVC Single Lumen	1/14/2026	Active	Assessment

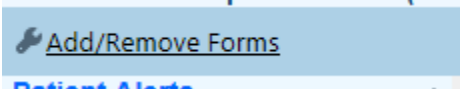
### 3. REMOTE CLIENT: Add the Catheter – IV Form

You must add the **Catheter-IV Form** in Remote Client and complete the appropriate catheter form based on the type of line, including:

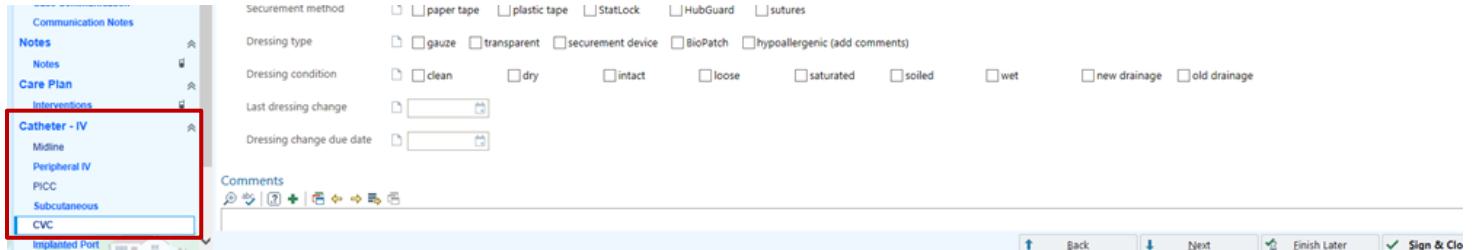
- **General Procedure Performed**
- **Catheter Details**
- **Site Assessment**
- **Any Applicable Comments**
- **This documentation needs to be done at SOC and EACH SUBSEQUENT VISIT**
- **Measurements should be included for any external length and EACH Dressing Change visit to monitor for any migration!**

Steps to add the Catheter-IV Form.

1. Within an open visit, click Add/Remove Forms at the top of the Form Navigator Section on the left.



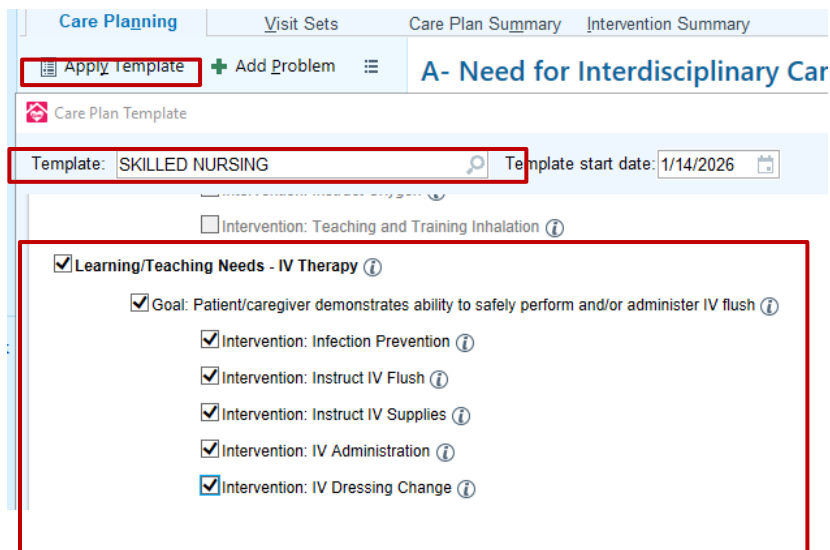
2. Select the **Catheter-IV Form**.
3. Choose **Yes** to indicate you would like to **Add the form to all Future Visits**.

A screenshot of the 'Catheter - IV' form in the Remote Client interface. The form is divided into several sections: 'Communication Notes', 'Notes', 'Care Plan', 'Interventions', 'Catheter - IV', 'Midline', 'Peripheral IV', 'PICC', 'Subcutaneous', and 'CVC'. The 'Catheter - IV' section is highlighted with a red box. Below this section, there are checkboxes for 'Securement method' (paper tape, plastic tape, StatLock, HubGuard, sutures), 'Dressing type' (gauze, transparent, securement device, BioPatch, hypoallergenic), 'Dressing condition' (clean, dry, intact, loose, saturated, soiled, wet), 'Last dressing change' (date/time), and 'Dressing change due date' (date/time). There is also a 'Comments' section with a text area and a 'Sign & Close' button.

### 4. REMOTE CLIENT: Add the IV Care Plan and Specimen Sample as needed.

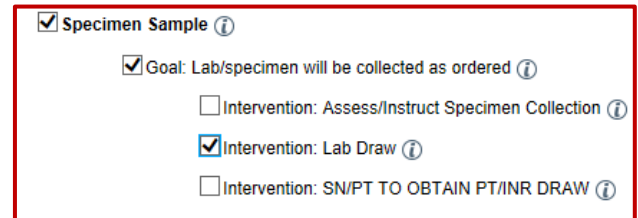
You must also add the IV Care Plan in Remote Client to document the orders.

1. In the **Care Plan Task**, click **Apply Template** and search for the **Skilled Nursing Template**.
2. Scroll down to find **Learning/Teaching Needs – IV Therapy**
3. Select Goal and **All Interventions**

A screenshot of the 'Care Planning' interface. The 'Apply Template' button is highlighted with a red box. Below it, the 'Care Plan Template' section shows 'Template: SKILLED NURSING' and 'Template start date: 1/14/2026'. A red box highlights the 'Learning/Teaching Needs - IV Therapy' section, which includes a goal 'Patient/caregiver demonstrates ability to safely perform and/or administer IV flush' and several interventions: 'Infection Prevention', 'Instruct IV Flush', 'Instruct IV Supplies', 'IV Administration', and 'IV Dressing Change'. All these items are checked.

4. Make sure to add the **Specimen Sample** care plan if lab draws are ordered.

**Note:** Select all appropriate Interventions.


A screenshot of the 'Specimen Sample' care plan template. It includes a goal 'Lab/specimen will be collected as ordered' and two interventions: 'Assess/Instruct Specimen Collection' and 'Lab Draw'. The 'Lab Draw' intervention is checked.

5. Click **Accept** to apply the templates.

## REMOTE Client: Modify the Care Plan Templates

You must modify and adapt the care plan to the patient's specific needs. Review the Problem, Interventions and Goals for any SmartText or descriptions that need to be updated.

1. First review the Care Plan Problem Header, select pencil icon next to title.


**Learning/Teaching Needs - IV Therapy** 

1/14/2026 LPN, SN

Teaching and learning needs for performing home IV therapy.


2. **UPDATE** description to **add specific line type** at the end of the existing text.

Description



Teaching and learning needs for performing home IV therapy.


Description



Teaching and learning needs for performing home IV therapy: Single Lumen PICC Right Basillic Vein.


3. Continue to modify Care Plan Goals and Interventions as appropriate and save Care Plan



**Care Planning** Visit Sets Care Plan Summary Intervention Summary

**Learning/Teaching Needs - IV Therapy**  ✓ Resolve ✕ Delete


1/14/2026 LPN, SN

Teaching and learning needs for performing home IV therapy.


**Goals**  Add Goal




**Patient/caregiver demonstrates ability to safely perform and/or ad...**  Add Intervention  Delete


1/14/2026 LPN, SN


 - (Patient/Caregiver:109161) will demonstrate ability to safely perform administration of IV medications within (HH Goal Timelines:109178).

- (Patient/Caregiver:109161) will demonstrate ability to correctly perform flushing technique within (HH Goal Timelines:109178).




**Interventions**  Add Problem Intervention


**Infection Prevention**   Create Order  Delete


1/14/2026 PRN 




 - Instruct (HH patient/caregiver:109132) in strategies to prevent infection: (HH infection prevention:109057).


- Instruct (HH patient/caregiver:109132) in how to recognize signs and symptoms of infection and when to notify home care agency and/or physician.


**Instruct IV Flush**   Create Order  Delete




1/14/2026 PRN 


 Instruct (HH patient/caregiver:109132) in how to perform flushing of IV line according to MD orders or protocol.


**Instruct IV Supplies**   Create Order  Delete




1/14/2026 PRN 


 Instruct (HH patient/caregiver:109132) in how to gather supplies, prepare supplies, administer IV medication, and disconnect IV medication.


**IV Administration**   Create Order  Delete

1/14/2026 PRN 

 (HH Nurse/Patient/Caregiver:109199) to administer IV medication as ordered including saline and heparin flushes as ordered or per protocol.

**IV Dressing Change**   Create Order  Delete

1/14/2026 PRN 

 Skilled nurse to change IV site dressing per protocol. PICC line dressing to be changed 24 hours after insertion, then weekly. Remove old dressing, cleanse with \*\*\*, replace bio-occlusive dressing, change cap, measure line and arm circumference.