Feb. 21 Epic *Update Companion*

Ambulatory Provider Companion

Updated: 1/26/21

On **Sunday, Feb. 21**, Epic will be updated with new features and enhancements to improve safety and quality of care, productivity and financial outcomes. This *Update Companion* contains details of the changes for your role. It is your sole training resource so be sure to review it carefully.

This *Update Companion* is prepared for the following job roles/functions:
- Physicians
- Physician Assistants
- Nurse Practitioners
- Rehab (Therapists)

Top Changes for Role/Department:

1. [Take Charge with the Macro Editor and Manager](#)

2. [Order Lung Cancer Screenings for Eligible Patients](#)

3. [Showing Results For… Chart Search Finds Closely Matching Results](#)

4. [New Look and Features for the Care Everywhere Outside Records Activity](#)

5. [Review All Alternatives Suggested by the Pharmacy](#)

If you need help with Epic, be sure to visit our library of tip sheets in the Epic Learning Home. Simply press F1 on your keyboard while logged in to Epic.

Key Impacts

| Key Change | Write Notes from In Basket in a Clean, Focused Workspace |

Key Benefits:

- Cleaner, more focused note-writing experience.

Description:

- When you edit or attest to **In Basket** notes, the note editor now appears in a floating window. You can review **In Basket** reports to the right of your note and more information from the patient's chart.

How to:

1. Click **Edit in Encounter** or **Attest in Encounter** to pend your note and reopen it in the sidebar of the patient's chart.

Easier-to-Read Imaging Results in Notes

Key Benefits:
- Easily add and review imaging results.

Description:
- Any notes that automatically include imaging results now show them in a cleaner format and include multiple results. This makes it quicker and easier for you to find the information you need.

How to:
1. To show information from the most recent imaging result for a procedure in your notes, type `.IMGRESULT`.

Recent Results (from the past 365 days)

Transesophageal Echo (TEE) Complete

Interpretation Summary
- The left ventricle is mildly dilated. There is moderate to severe global hypokinesis with minimal segmental variation. The left ventricular ejection fraction is 20% by visual estimate.
- The right ventricle is mildly dilated.
- There is trace mitral valve regurgitation.
- The tricuspid valve shows trace regurgitation.

Findings
Left Ventricle
The left ventricle is mildly dilated. There is mildly increased left ventricular wall thickness consistent with mild concentric hypertrophy. There is moderate to severe global hypokinesis with minimal segmental variation. The left ventricular ejection fraction is 20% by visual estimate.

Right Ventricle
The right ventricle is mildly dilated. There is moderately decreased systolic function of the right ventricle.

Left Atrium
The left atrium cavity size is normal.

Take Charge with the Macro Editor and Manager

Key Change

Key Benefits:
- Personalize your workflow.
- More accuracy and reliability.

Description:
- The **Macro Editor**'s style was updated to match other **NoteWriter** activities, and the **Macro Manager** was added. This feature allows you to search for a specific macro, as well as browse and add yourself as a user to macros created by other users, without asking the owner to add you.
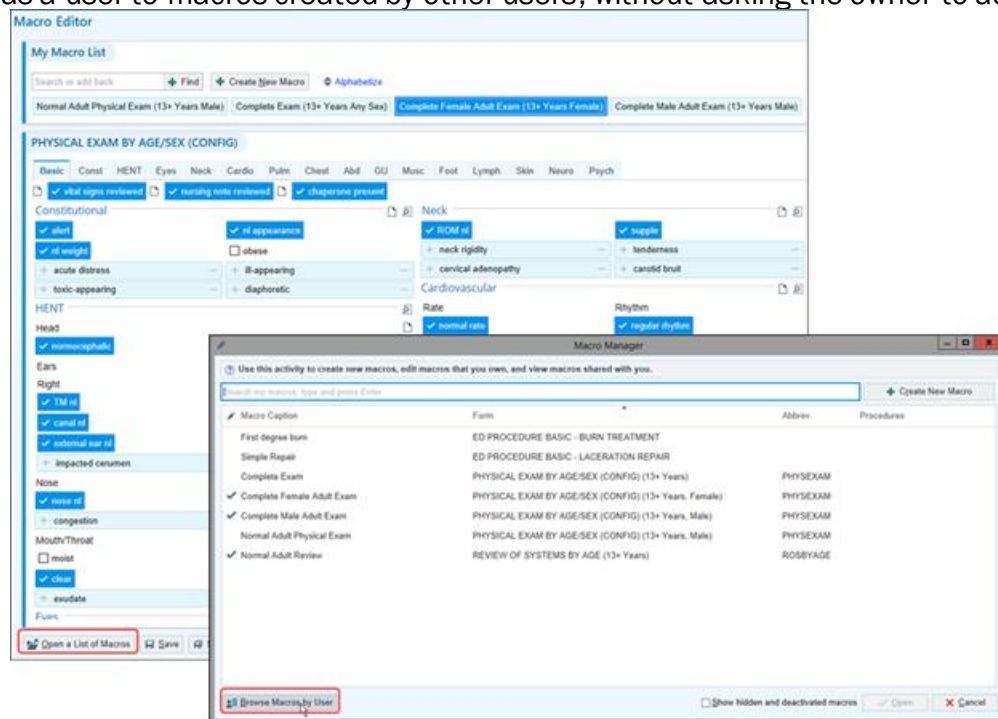
SmartPhrase Manager Has a New Look and Streamlined Workflow

Key Benefits:
- Easy visibility.
- More accessible.

Description:
- You can easily switch between user **Phrases** and system **Phrases** by selecting **User, Profile, Department, Location** or **Facility** when the **SmartPhrase Manager** activity is open. **Note: User** is selected by default.

How to:
1. Select the **User** level.
2. Select one or more **SmartPhrases** to share with another user.
3. Click the **Share With** button. The **Share SmartPhrases** window appears.

4. Enter the user with whom you want to share the **SmartPhrase**.
5. Select the **Can Edit?** check box if you want to mark the user as an editor who can make changes to the **SmartPhrase**.
6. Click **Accept.**

Add SmartPhrases to Your Notes Using SmartLists

Key Benefits:
- Personalized and improved workflow.

Description:
- To speed up documentation, you can now use **SmartLists** to add **SmartPhrases** to your notes and other documentation in **SmartTool**-enabled text boxes in **Epic's Hyperspace**, **Haiku** and **Canto**.
- Example: Create a **SmartList** that includes all the **SmartPhrases** you use to document your most performed procedures, so you can quickly pull in any of the **SmartPhrases** by adding the same **SmartList**.

Time Saver ⏱	Manage Your User SmartSets and Order Sets More Easily

Key Benefits:
- Time saver.

Description:
- Changes for managing your **SmartSets** or **Order Sets** include:
    - Your favorites and **SmartSets** or **Order Sets** appear in expanded sections.
    - Quickly mark or unmark **SmartSets** or **Order Sets** as favorites by clicking the *star* icon.
    - Remove your **SmartSet** or **Order Set** versions with the new **Delete Version** button.

A New Look for In Basket Letter Messages

Key Benefits:
- Improved communication.
- More accessibility.

Description:
- Message type **1-Letter Message** and its printing options have a modernized appearance.
- The **Print On** field now says **Delay sending until.** To send the message immediately, you should leave this field blank.
- You can now mark the priority of the message, so its importance is clear to recipients. Messages are automatically set as routine priority. To raise or lower the priority, click the **High** or **Low** priority button.
- All printer settings now appear together in the **In Basket Letter Printing** window.

	Document Historical Immunizations More Quickly
Time Saver	

Key Benefits:
- Time saver.
- More efficient.

Description:
- Save clicks by using the **Address Topic** window to document a historical immunization directly from the **Health Maintenance** activity or Storyboard.

Key Updates: Care Everywhere

New Feature ✸	**Streamlined Workflows in the Request Outside Records Activity**

Key Benefits:
- Improved workflow.
- More accuracy and reliability.
- More efficient.

Description:
- Use the new checkbox next to the **Favorites** header in the **Choose Organizations to Query** section to query all your favorited organizations at once.
- When searching for organizations, you can now click forward and backward arrows to navigate between pages.
- The **Collect Authorization Button** is now called **View Authorization**.

epictraining@houstonmethodist.org | it.houstonmethodist.org

New Look 🔍

New Look and Features for the Care Everywhere Outside Records Activity

Key Benefits:
- More efficient.
- Improved workflow.

Description:
- The **Care Everywhere Outside Records** activity has been redesigned, making it more consistent with **Chart Review** and easier to access the most relevant patient information.

Care Everywhere Documents Have a Fresh Look and New Workflows

New Feature

Key Benefits:
- Easy visibility.
- More efficient.

Description:
- **Care Everywhere** documents were updated with a new look to align more closely with **Chart Review.**
- Most action buttons now appear in the report toolbar.
- You can use the **wrench** icon to modify your preferred section order.

New
Feature

## Mark Outside Information as Reviewed

Key Benefits:
- Improved workflow.

Description:
- You can now mark outside information as reviewed in the **Reconcile Outside Information** activity, without having to add or discard all information on a given tab.

How to:
1. A new check box (1), selected by default, marks outside information on the tab as reviewed when you click **Accept** or **Accept/Next** (2). After you have reviewed the information on a tab, a check mark appears on the **folder** icon for the tab (3).
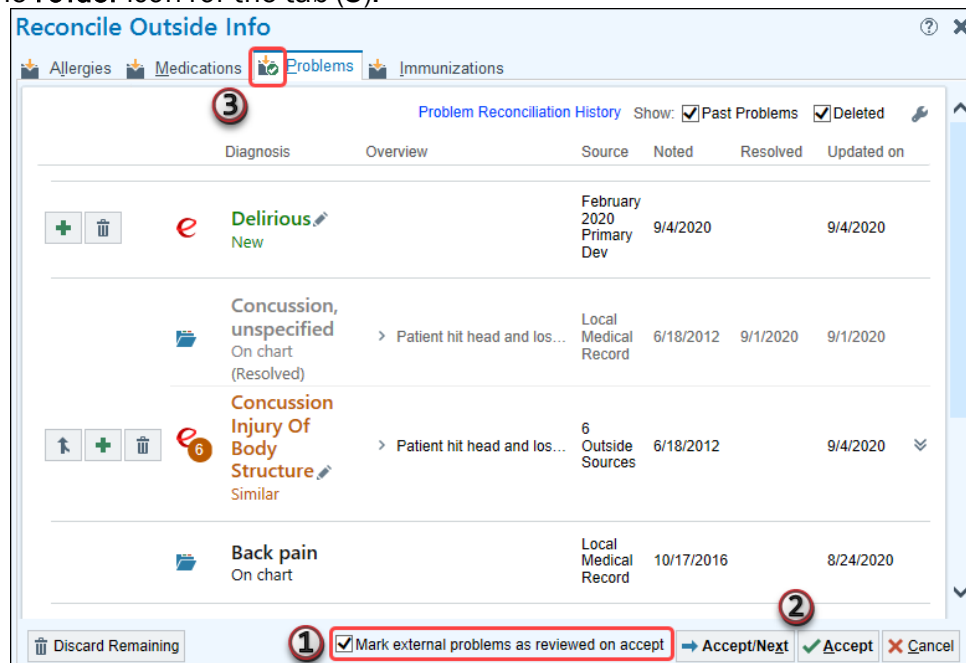
| New Feature | Links Can Appear in Care Everywhere Documents |

Key Benefits:

- More accuracy and reliability.

Description:

- Links from trusted sites now appear in **Care Everywhere** documents. Links from untrusted sites appear as plain text or are blocked when you click them.

Health Concerns Section

| Health Concern	Date	Related Problem
Heart Disease	10/9/2020	⬑Link to Third-Party System
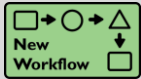
View Event Notifications in In Basket

Key Benefits:
- Improved communication.

Description:
- When other Epic organizations send you event notifications (messages that contain information about a patient's hospital admission, discharge, transfer or registration in the emergency department) those messages now appear in the **Outside Events** folder in **In Basket.**
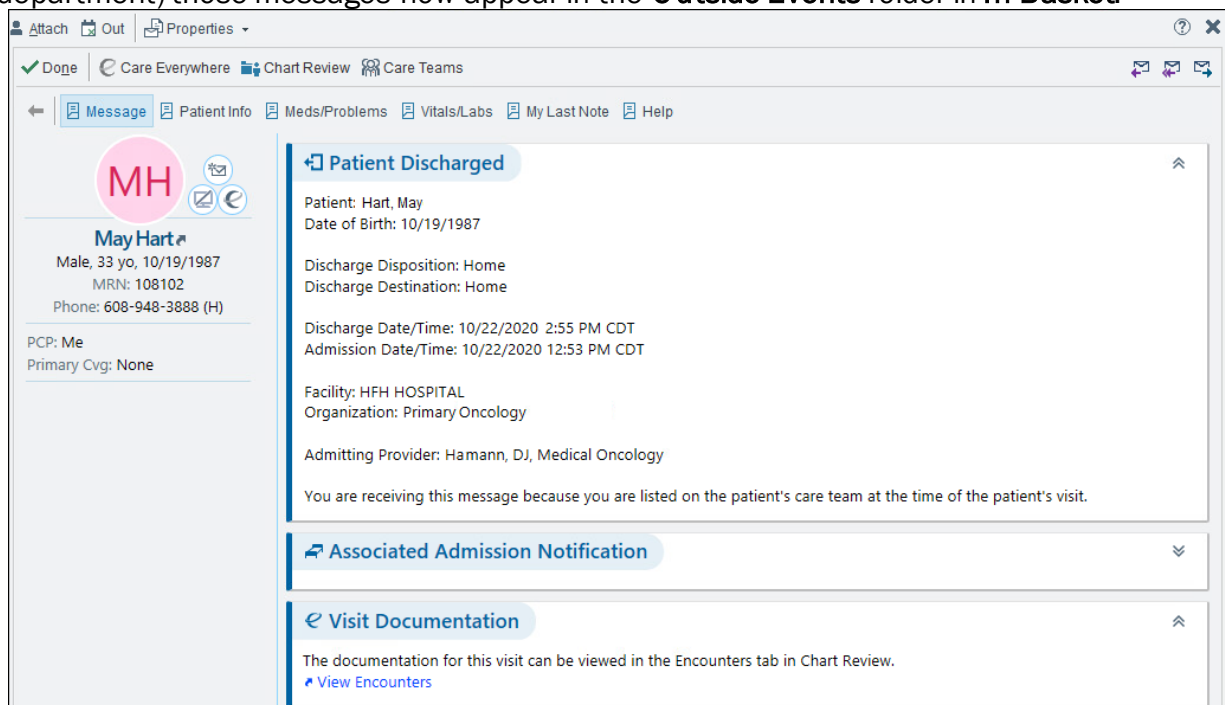
Chart Search Results Load More Quickly for External Documents

Key Benefits:
- Time saver.
- More efficient.

Description:
- Large documents no longer show a preview in the **Chart Search** hover bubble so your results can load more quickly. Instead, click **View the full document** to open it in the document viewer.

See Images Exchanged Using Care Everywhere in Chart Review

Key Benefits:
- Improved workflow.
- More accessibility.

Description:
- When you receive reference-quality clinical and administrative images from other organizations using **Care Everywhere Image Exchange**, you can now review those images on the **Media** tab in **Chart Review**. These images are indicated by the **Care Everywhere** icon.
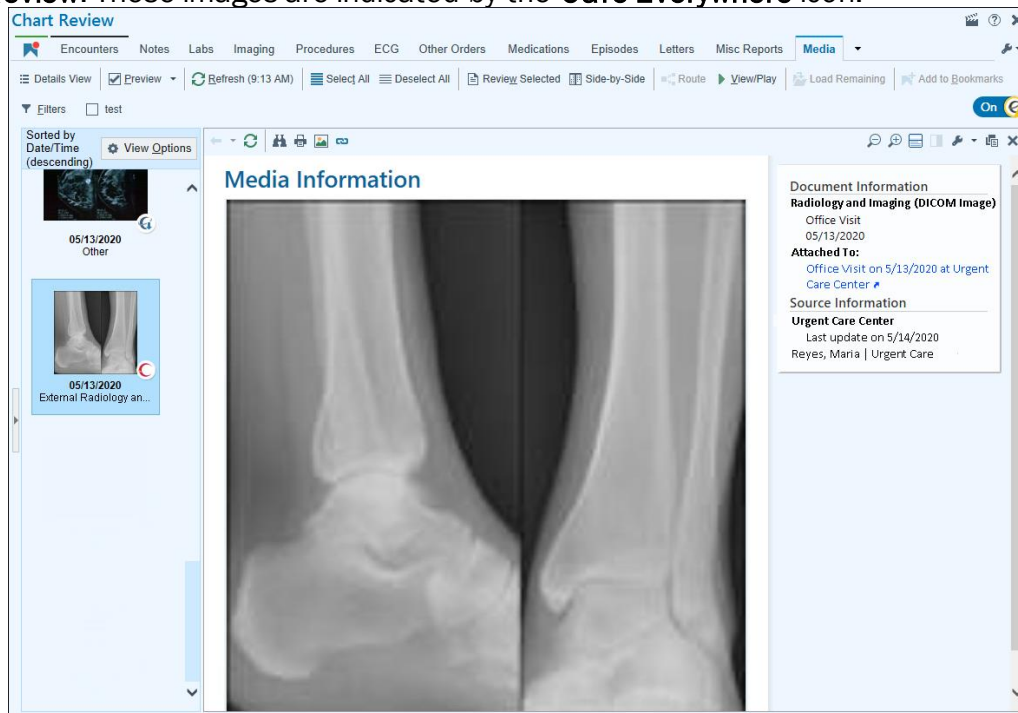
E-Prescribing

Automatic Selection of Coverages Makes Prior Authorization More Available

Key Benefits:
- Time saver.
- More accuracy and reliability.

Description:
- Due to less strict checks behind the scenes, a patient's primary coverage from an eligibility query is now selected more often. This allows you to more frequently use electronic prior authorization and **Real-Time Prescription Benefits.** After running an eligibility query, make sure a primary coverage is selected.

Review All Alternatives Suggested by the Pharmacy

Key Benefits:
- More accuracy and reliability.
- Financial benefit for your patients.

Description:
- When you receive a prescription change request from a pharmacy, you can now review all the alternatives that the pharmacy suggests. If you're not sure that the primary alternative is the right choice, review the other alternatives to see if there's a better fit, then open the encounter and replace the medication.

Changes Requested

fluticasone (FLONASE) 50 MCG/ACT nasal spray

Changed from: Ciclesonide (OMNARIS) 50 MCG/ACT SUSP
All pharmacy suggested alternatives are listed below

Sig: 2 sprays in each nostril daily.
Disp: **16 g**   Refills: 12
Start: 1/16/2020
Class: Normal
Non-formulary
Last ordered: 2 weeks ago by Amanda Parker, MD
Rx #: RXREF_1579195000052
Pharmacy comment: **NOT COVERED BY PLAN, PLEASE PRESCRIBE COVERED ALTERNATIVE.**
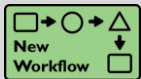
All Pharmacy Suggested Alternatives:
- fluticasone (FLONASE) 50 MCG/ACT nasal spray
- mometasone (NASONEX) 50 MCG/ACT nasal spray
- flunisolide (NASALIDE) 25 MCG/ACT (0.025%) SOLN
- budesonide (PULMICORT) 0.5 MG/2ML nebulizer suspension

To prescribe one of the alternatives listed above, open the encounter and click Replace. ⬈ Open Encounter

To be filled at: LWP PHARMACY

 Decide Whether to Keep the Message for a Completed Prior Authorization
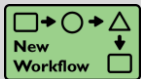
Key Benefits:
- More efficient.
- Improved workflow.

Description:
- You can now control if your message for a prior authorization is removed when you complete it.

How to:
- Select the **Follow-up complete** check box to remove the message as before or clear it to save the message as a reminder to complete your follow-ups.

Restart Prescription Prior Authorizations After Questionnaire Deadlines Have Passed

Key Benefits:
- More efficient.
- Less clicks.

Description:
- If the deadline to respond to an authorization's question set has passed, you can now restart the authorization with a click instead of manually copying information into a new authorization.

Health Maintenance
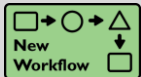
 Order Lung Cancer Screenings for Eligible Patients

Key Benefits:
- Improved workflow.
- Less clicks.

Description:
- Place orders for patients needing lung cancer screenings by clicking the check mark on their Storyboard without having to leave the screen you're on.

Immunizations

New
Feature

Fewer Immunizations Can Be Deferred

Key Benefits:
- Patient safety.
- More accuracy and reliability.

Description:
- Help prevent accidental administration of deferred immunizations that could be dangerous to certain patients.

How to:
1. If a vaccine you can swap out during administration can't be deferred, the **Defer** button no longer appears.
2. For any of the immunizations: Place a new order when the patient is ready to receive the vaccine instead of deferring it.

Time
Saver

Updated Keyboard Shortcuts in the Immunizations Activity

Key Benefits:
- Time saver.
- Less clicks.

Description:
- The following buttons have new keyboard shortcuts:
  - **E-Sign** (in the **Immunizations** activity toolbar only): Alt+E
  - **Immunization Report:** Alt+O
  - **Incomplete Admins:** Alt+M
  - **New Admin:** Alt+D
  - **Query Imm Registry:** Alt+Q
  - **Refresh:** Alt+R
  - **Storage Unit:** Alt+U

Chart Review

Chart Search Finds Closely Matching Results

Key Benefits:
- Time saver.
- More accuracy and reliability.

Description:
- **Chart Search** now checks for search term typos, saving you time. If you misspell a search word and there are no results, you'll now see a closely matching term from the chart.

See Most Recent Lab Results Faster

Key Benefits:
- Time saver.
- More efficient.

Description:
- **Lab Spotlight** sections summarize the most recent lab results and components, like **Hemoglobin A1C** or **WBC**, for over 100 different labs.

Good to Know	Ending a Visit in a Specialty Department or Discharging an Admitted Patient Now Marks Patient's Status as Visit Complete

Key Benefits:
- Time saver.
- More efficient.

Description:
- In specialty departments, actions that typically mark the conclusion of an outpatient visit now automatically default the patient's status to **Visit Complete** in the **Schedule** activity.
- Before, the patient's status remained as **Visit in Progress** until the patient was checked out or the visit was signed.
- Similarly, if a patient is admitted to the hospital directly from an outpatient visit in a specialty department, discharging the patient automatically updates their status for the visit to **Visit Complete.**

ABN and Medical Necessity

Time Saver	Don't Mark ABNs As Void

Key Benefits:
- Time saver.
- Improved workflow.

Description:
- The **ABN Voided** status no longer appears as an option when you click the **Notice status** field. As before, the system automatically voids unnecessary ABNs, so you don't need to change the status manually.

Use a New ABN Template for Dually Eligible Beneficiaries

New Feature

Key Benefits:
- Less clicks.
- More efficient.

Description:
- The **Dually Eligible Beneficiaries ABN** form now appears automatically for patients eligible for both Medicare and Medicaid, making it easier to give them the correct form.
- You no longer must select the form manually.

In Basket

Time Saver ⏱ **Mark a Message Filter as a Favorite in Card View**

Key Benefits:
- Time saver.
- Personalize your workflow.

Description:
- Easily apply a frequently used message filter in **Card View** by marking the filter as a favorite.
- Select the type of message you want to view, then apply a filter and click the **star**.
- You can now click the **favorite filter** icon to quickly see the matching messages.

New
Feature ✸
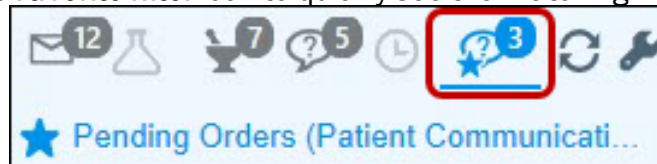
Warning Message Appears When New Message QuickActions Include Invalid Recipients

Key Benefits:
- More efficient.
- More accuracy and reliability.

Description:
- You'll now receive a warning message when you create a message using **New Message QuickAction** and the recipient doesn't have security to receive the message type you're sending. Before, invalid recipients were removed from the message without notifying you.

Staff Message   ✕

❌ **Invalid recipients.**
    This QuickAction contains a recipient that cannot receive this message and it was removed.

                                                                                                            [OK]
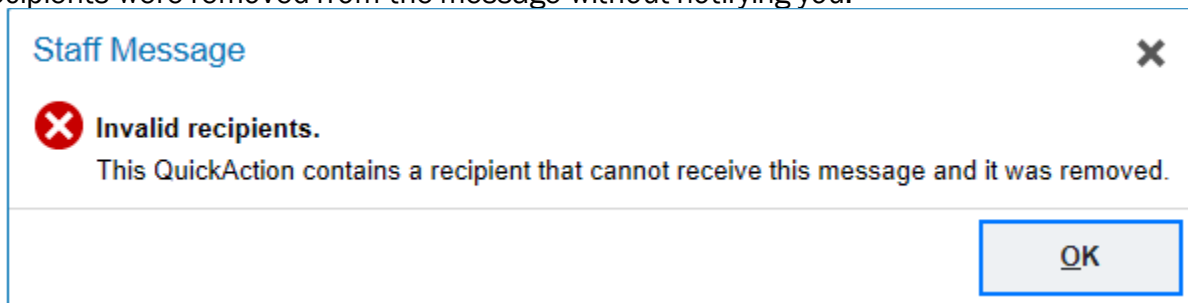
 It's Now More Obvious When You're Viewing Information for a Deceased Patient

Key Benefits:

- Time saver.

Description:

- When you open an **In Basket** message or the chart for a deceased patient, the circle containing the patient's photo or initials is now grayed out and surrounded by a black border.
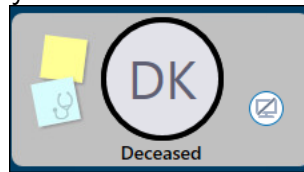
Storyboard

New Look 🔍	**Easily See Treatment Plan and Therapy Plan Information in Storyboard**

Key Benefits:
- Easily visible in Storyboard.
- More accuracy and reliability.

Description:
- You can now see a patient's active treatment plan, therapy plan, radiation oncology episode and blood and marrow transplant information at the top of Oncology Storyboards and choose whether to expand or collapse this information by default.

How to:
- Hover over the section and click the **chevrons** that appear.
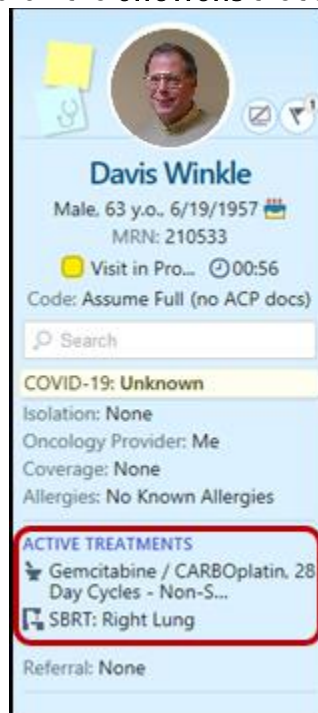
New
Feature ★ **Easily See Treatment and Therapy Plan Information in Storyboard**

Key Benefits:
- Easily visible in Storyboard.
- More accuracy and reliability.

Description:
- You now have more control over how you see a patient's cancer treatment and therapy plan information in Storyboard.

How to:
- If a patient has an active treatment or therapy plan, you can expand the highlighted banner (A) to show more details. Hover over the banner and click the **chevron** to collapse or expand the section (B). Your preference for expanding the section is then saved. If a patient has active radiation therapy episodes, treatments or therapies, that information now appears when you hover over the section (C).
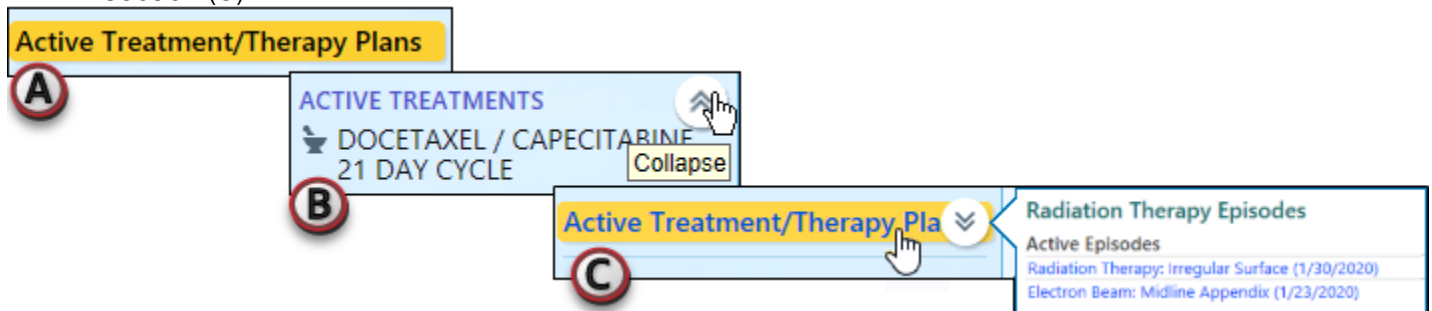
After Visit Summary (AVS)

New Feature ✦   ## Use Half Units in Insulin Instructions

Key Benefits:
- Patient safety.
- More efficient.

Description:
- You can now choose to use half units of insulin for the **After Visit Summary.**

How to:
- To enable half units, select the **Use 0.5 Units for Sliding Scale in AVS** check box when you're creating insulin instructions.

New Look	**Total Basal Dose Now Appears in the Insulin Instructions Section of the AVS**

Key Benefits:
- Patient safety.
- Easily visible in the **AVS**.

Description:
- Patients with insulin pumps now have easy access to their **Total Basal Dose** in the **Insulin Instructions** section of the **AVS**.

Your Insulin Instructions

Pump Settings
Insulin Aspart 100 UNIT/ML
Measure your blood glucose before each meal. Based on your blood glucose reading, use your pump to dose insulin.

Basal Rate		Blood Glucose Target		Sensitivity Factor		Carb Ratio	
Time	units/hr	Time	mg/dL	Time	mg/dL/unit	Time	g/unit
12:00 AM	1.65	12:00 AM	90 - 130	12:00 AM	30	12:00 AM	10
3:00 AM	1.5			6:00 AM	35	12:00 PM	8.5
7:00 AM	1.5			8:00 PM	33	4:00 PM	6.5
8:00 AM	1.55						
4:00 PM	1.6						

Total Basal Dose
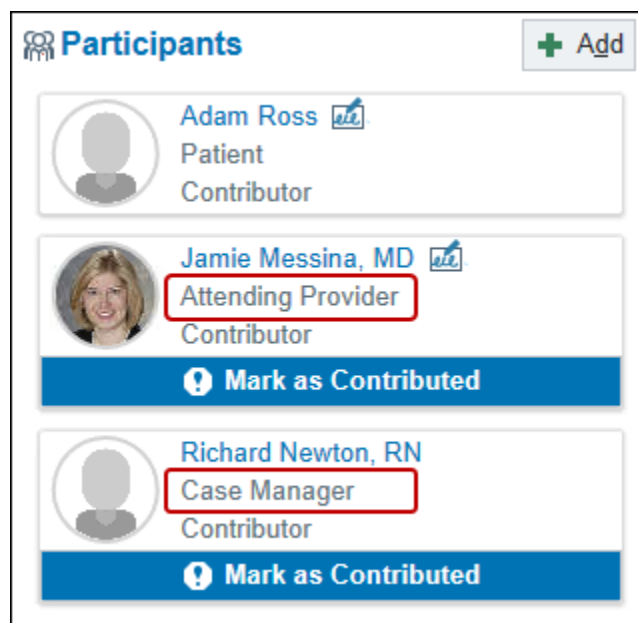37.65 units/day

Outpatient Rehab

New Look 🔍   **More Accurate Provider Roles in Plan of Care**

Key Benefits:
- More accuracy and reliability.
- More efficient.

Description:
- The professional role listed under a provider's name in the **Participants** section of a Plan of Care is now more specific.

Key Change	Track and Follow Up on Outpatient Plans of Care

Key Benefits:
- More accuracy and reliability.
- Improved communication.

Description:
- Use the **Plan of Care Activity and Reports** to see plans of care needing signatures or recertification and to find patients without plans of care.
- Send reminders to providers who haven't signed using the **Follow Up** buttons, which open the **Follow Up** communication sidebar.
- Click to resend letters, **In Basket** messages or to note that you called, then click **Accept**.
- Check who's followed up in the **Last Comm** column and **Communication History** print group.
- Therapists can only see their own plans.
- Managers and other staff can see plans for the whole department.

Time Saver ⏱	## Use the Effective from Date to Find Specialty Plan of Care Notes in Chart Review

Key Benefits:
- Easily visible in **Chart Review**.
- Time saver.

Description:
- To make it easier to find and sort specialty Plan of Care notes in **Chart Review**, the **effective from** date now appears in the **Encounter Date** column instead of the date the plan was created.

Orthopedics

Time Saver ⏱	**Review Events Without Leaving the Relevant Summary**

Key Benefits:
- Time saver.
- Less clicks.

Description:
- When you review office visits and other events on the **Relevant Summary** in your patient's chart, you can now hover over an event to review the event in a hover bubble. This way, you can quickly review your patient's events without leaving the **Relevant Summary**.

Ophthalmologists

New Feature ✸   **Using Eye Codes in the Updated Level of Service Calculator**

Key Benefits:
- More efficient.

Description:
- If you have access to eye codes in the updated **Level of Service Calculator**, you will now see a sleek new **Eye** tab. **Note:** The calculations and codes haven't changed.

How to:
1. You can expand the **History and Exam** sections to view and mark elements that contribute to the level of service. You can also use the **Time** tab (A) to mark the time spent for the appointment.

Miscellaneous

New Look 🔍	## A New Look for Selecting Care Team Recipients (Anticoagulation)

Key Benefits:
- Improved workflow.
- More efficient.

Description:
- When you route INR results through the **Warfarin Anticoagulation Tracking** navigator section, clicking **Care Team** opens a new window for selecting recipients.

How to:
1. Click a recipient's line to select recipients individually (A). Selected recipients appear in the right sidebar (B).
2. Click a selected recipient's line or click the **X** next to their name (C) to deselect recipients individually.
3. Click **Select All** to select all recipients (D). When all recipients are selected, the **Select All** button becomes the **Remove All** button.
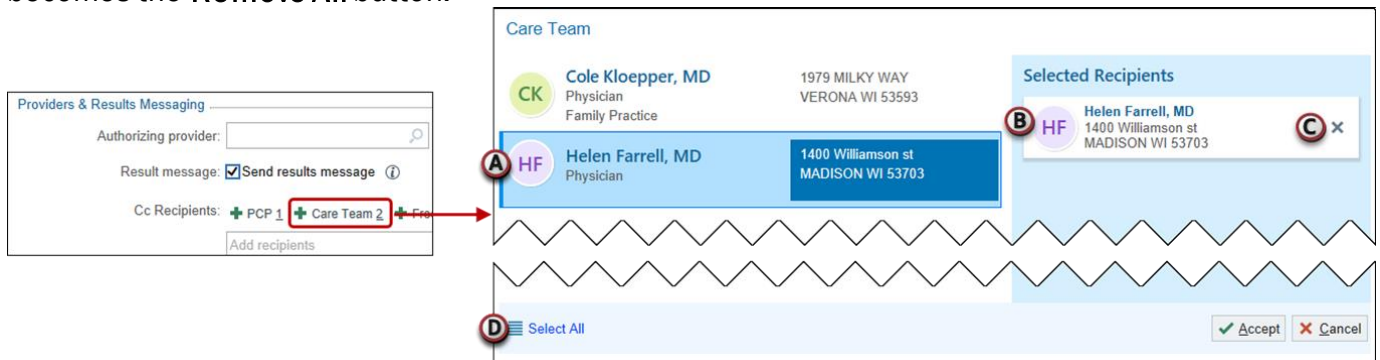
New Look 🔍 **Audiograms Now Appear in Hertz on a Logarithmic Scale**

Key Benefits:
- Easier to document.
- More efficient.

Description:
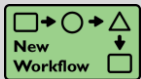- Audiograms in Epic are now easier to document, review and to compare with audiograms from other systems, since you now record frequencies in hertz instead of kilohertz.
- High-frequency readings are now shown on a logarithmic scale.
- Other visual updates make it easier to see icons and review data.
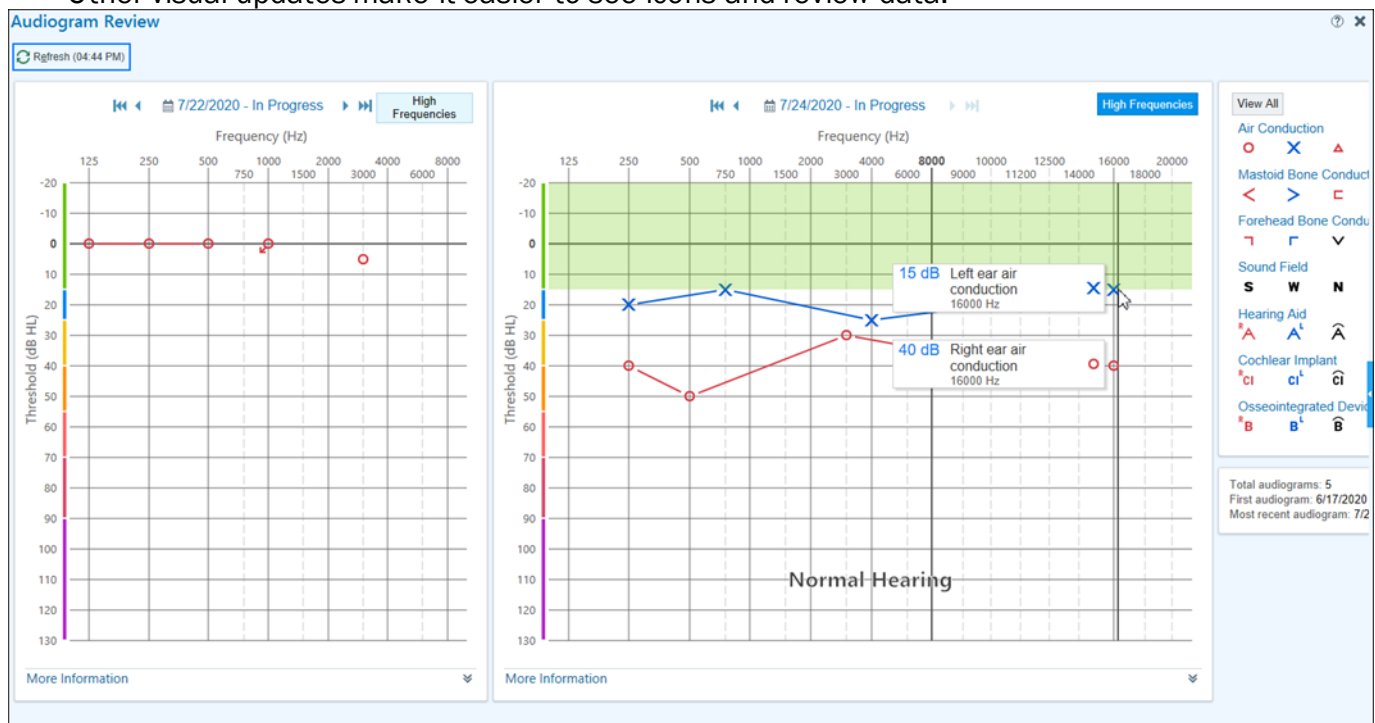
Add Fetal Relatives in Pedigree (History Section)

Key Benefits:
- Improved workflow.
- More accuracy and reliability.

Description:
- Record and visualize the history of pregnancies in the patient's family in **Pedigree**.

How to:
- Right click a relative to add offspring, then select a fetal status in the right sidebar to indicate a pregnancy outcome. Fetal relatives appear in the **Pedigree** in standard notation.
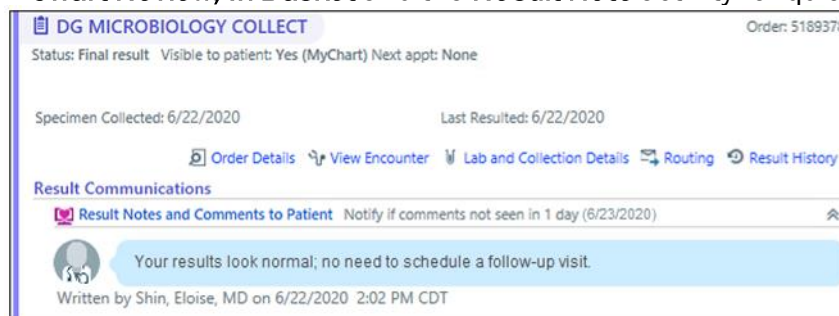
New Feature ✴	## See MyChart Result Comments in Your Workspace

Key Benefits:
- More efficient.
- Improved workflow.

Description:
- When you add comments to results and release them to patients in **MyChart**, the comments are also available in **Chart Review**, **In Basket** and the **Result Note** activity for quick reference.

*The clinician's most recent comment to the patient appears in the **Result Note** activity.*

Time Saver ⏱	## New Shortcuts for the To Do Sidebar and In Basket Folders

Key Benefits:
- Time saver.
- Less clicks.

Description:
- Use the following new keyboard shortcuts to decline a deficiency or mark it as already done in the **To Do** sidebar, **In Basket's Chart Completion**, **Cosign-Clinic Orders** and **Home Care Orders** folders:
  - Alt+L = Decline
  - Alt+Y = Already Done