

# 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



#### 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.

The screenshot displays the Epic In Basket interface. The main window is titled "Attest Note" and shows a note editor for "Progress Notes" by Mark E. Juarez, MD-PG3, a Resident Physician in Medicine. The note is dated 5/14/2020 at 3:34 PM and is marked as "Cosign Needed". The editor includes a text area, a font size dropdown (10), and a toolbar with various editing tools. A red box highlights the "Attest in Encounter" button in the top right corner. The sidebar on the right contains a "Cosign-Required Note" section, an "Attached Notes" section, and a "Subjective" section. The "Attached Notes" section shows a list of notes by Mark E. Juarez, MD-PG3, with details such as Author, Service, Author Type, Filed, Date of Service, Note Type, Status, Editor, and Cosign Required. The "Subjective" section contains the text: "The patient reports the following concerns today: headache and some shortness of breath".





### 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.





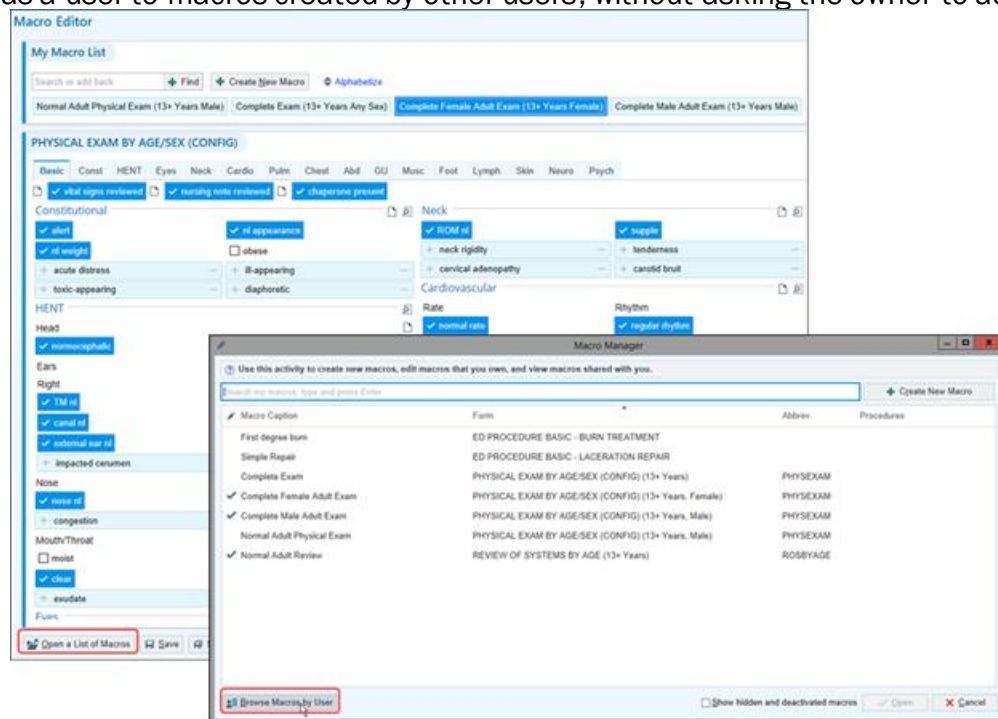
### Take Charge with the Macro Editor and Manager

#### Key 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.

**SmartPhrase Manager - MD, ROBERT SUTTON [50001]**

Level: **User** | Profile | Department | Location | Facility | User: MD, ROBERT SUTT

+ New User SmartPhrase | Edit | SmartPhrase Lookup | Share With | Copy To | Remove From List | Delete

Name	Description	Editors
CLINEXAM	CLINICAL: Screening examination. Clinical breast examination performed by the technologist toda...	MD, ROBERT SUTTON
BASEEXAM	CLINICAL: This is a baseline examination. *** FINDINGS: Bilateral XCCL, CC, and MLO views wer...	MD, ROBERT SUTTON
FINALASSESS	FINAL ASSESSMENT: BIRADS: Category 0 - Incomplete. The imaging department will send a lett...	MD, ROBERT SUTTON
CLINSCREEN	CLINICAL: Screening. Clinical breast exam performed by the technologist today was negative for...	MD, ROBERT SUTTON

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**.

**Share SmartPhrases**

Selected SmartPhrases

Name	Description
CLEAN	

Choose users to share with

	User	Can Edit?
1	HOWARD OLIVIA [30620]	<input type="checkbox"/>
2		<input type="checkbox"/>

Copy Users | Mark All as Editors

Accept | Cancel





### 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**.

**User SmartList – sgnMyProc [12833]**

Choice	Default?
{:PHR.ENDOSCOPY}	
{:PHR.COLONSCOPY}	
.ercd	<input type="checkbox"/>

**Settings**

Name: sgnMyProc

Display Name:

Name	Description
☆ ERCD	ERCD on @TODAYDATE@
☆ ERCIMGFINDINGS	Breast imaging density and findings
☆ ERCIMGPROC	Displays the procedure associated with the current order or all linked orders.





### 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.

**My User Versions**

★ 542	ED DISPO MEDS (My Version - ED DISPO MEDS)	ED DISPO MEDS (My Version - ED DISPO MEDS)	
★ 1148	IMM SMARTSET (My Version - A IMM SmartSet)	IMM SMARTSET (My Version - A IMM SmartSet)	
☆ 1148	IMM SMARTSET (My Version - B IMM SmartSet)	IMM SMARTSET (My Version - B IMM SmartSet)	

**Search Results**

Search for a SmartSet to get started

Delete Version

+ New Version Copy Version Edit Version Cancel





### 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.

The screenshot displays the 'Letters' interface in Epic. At the top, there are two search fields: 'Scheduling Department' and 'Letter', both with red error icons. To the right of these fields are 'High' and 'Low' priority buttons. Below these is a 'Patient' field with a red error icon and a 'Current Patient' button. A toolbar with various icons (including a magnifying glass, undo, redo, and a plus sign) is located below the patient field. To the right of the toolbar is an 'Insert SmartText' button and a '100%' zoom dropdown. A large text area for the message content is positioned below the toolbar. On the right side of the interface, there is a 'Dates' panel with a collapse icon. It contains two sections: 'Delay sending until' with 'Date' and 'Time' input fields, and 'Expire on' with a help icon, 'Date', and 'Time' input fields. At the bottom right, there are 'Send' and 'Cancel' buttons.





### Document Historical Immunizations More Quickly

#### 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



#### 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**.

**Request Outside Records**

**Choose Organizations to Query** [View Authorization](#)

Care Everywhere Search by organization name, address, or Care Everywhere ID

Name	Address	Associated Organization
<input checked="" type="checkbox"/> Favorites		
<input checked="" type="checkbox"/> Glacier Edge West Clinic	6001 Hickory Hill St CROSS PLAINS WI 53528	Glacier Edge Healthcare
<input checked="" type="checkbox"/> Metro Medical Center	2285 Observatory Dr MADISON WI 53706	
<input checked="" type="checkbox"/> River Hills Health System	8110 Gatehouse Road Baraboo WI 53913 United States	
Organizations in Wisconsin		
<input type="checkbox"/> Allegro	VERONA WI 53593	
<input type="checkbox"/> Bellvue Clinic	MADISON WI 53703	
<input type="checkbox"/> Capital Clinics	13 Lakeside St MADISON WI 53715	
<input type="checkbox"/> Constellation	700 Verona Road VERONA WI 53593	

Viewing organizations 1 to 30 of 300





## 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.

The screenshot displays the 'Care Everywhere' interface with a top navigation bar containing 'Overview', 'Documents', and 'Results' tabs. The main content area lists three organizations, each with a 'Summary', 'Documents', and 'Results' section.

Organization	Updated	Last Known Encounter	Summary	Documents	Results
River Hills Health Care	Updated 09/23/20	09/03/20	<ul style="list-style-type: none"><li>Clinical Summary As of 09/23/20</li><li>Care Plan As of 09/23/20</li><li>Dialysis Summary As of 09/23/20</li><li>Media</li></ul>	<ul style="list-style-type: none"><li>History 09/03/20</li><li>Office Visit 09/03/20</li><li>History 08/28/20 — Obstetrics</li></ul>	<ul style="list-style-type: none"><li>ASSAY NON-ENDOCRINE RECEPTOR 06/20/12</li><li>CT SCAN, PELVIS, W/O CONTRAST 06/20/12</li><li>SONO ABDOMEN LIMITED 06/20/12</li></ul>
Lakeland Valley Organization	Updated Yesterday	07/29/20	<ul style="list-style-type: none"><li>Clinical Summary As of Yesterday</li><li>Care Plan As of Yesterday</li><li>Dialysis Summary As of Yesterday</li></ul>	<ul style="list-style-type: none"><li>Office Visit 07/29/20 — Family Practice</li><li>Telephone 05/26/20 — Home Health Services</li><li>Community Orders 11/14/19 — Family Practice</li></ul>	<ul style="list-style-type: none"><li>LAB URINALYSIS 11/04/19</li><li>CT SCAN, PELVIS, W/O CONTRAST 06/20/12</li><li>SONO ABDOMEN LIMITED 06/20/12</li></ul>
Green Field Health Network	Updated Yesterday	09/17/20	<ul style="list-style-type: none"><li>Clinical Summary As of Yesterday</li><li>Care Plan As of Yesterday</li><li>Dialysis Summary As of Yesterday</li></ul>	<ul style="list-style-type: none"><li>Office Visit 09/17/20 — Family Practice</li><li>Office Visit 08/12/20 — Family Practice</li><li>Office Visit 07/08/20 — Family Practice</li></ul>	<ul style="list-style-type: none"><li>ASSAY FERRITIN 02/20/20</li><li>ASSAY NON-ENDOCRINE RECEPTOR 06/20/12</li><li>CT SCAN, PELVIS, W/O CONTRAST 06/20/12</li></ul>





### Care Everywhere Documents Have a Fresh Look and New Workflows

#### 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.

**Clinical Summary - River Hills Health System**

02/03/2016

**Clinical Summary**

River Hills Health System  
Source Organization

Alexander Hopkins - 67 y.o. Male; born Nov. 10, 1952

Clinical Summary, generated on Feb. 03, 2016

**Source Comments** - River Hills Health System  
River Hills Health System has fully implemented EpicCare in all departments except Dermatology.

**Allergies**

Active Allergy	Reactions	Severity	Noted Date	Comments
Penicillins	Rash	Medium	12/29/2014	

[Reconcile with Patient's Chart](#)

**Current Medications**

Prescription	Sig.	Disp.	Refills	Start Date	End Date	Status
ketoprofen (ORUDIS) 75 mg capsule Indications: Osteoarthritis of right knee	Take 1 capsule (75 mg total) by mouth 4 times daily as needed for pain	30 capsule	0	12/24/2015	06/21/2016	Active





### Mark Outside Information as Reviewed

#### Key Benefits:

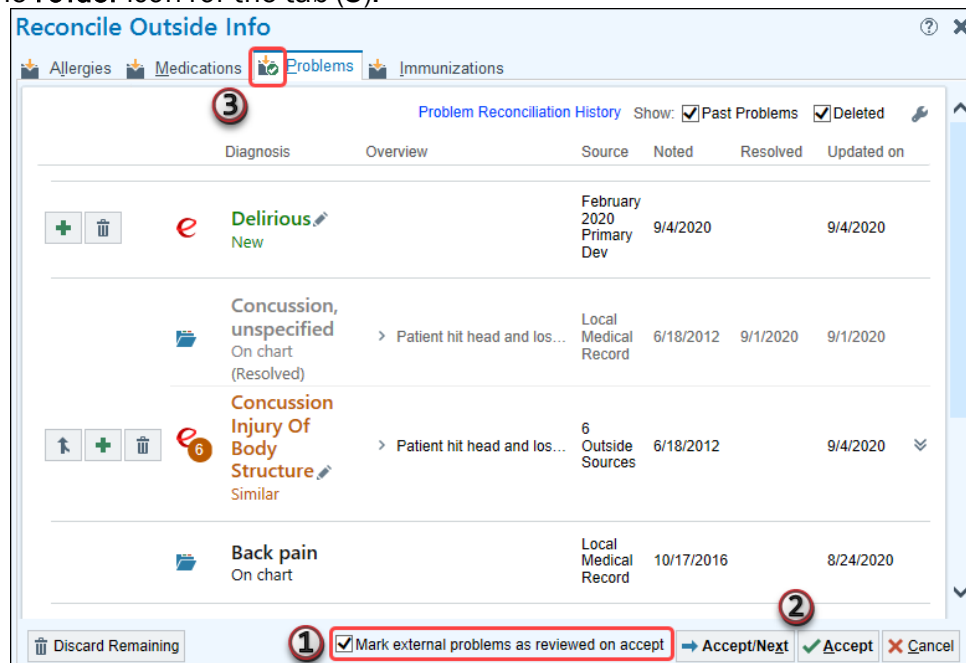
- Improved workflow.

#### 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).





### Links Can Appear in Care Everywhere Documents

#### Key Benefits:

- More accuracy and reliability.

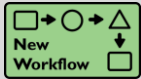
#### Description:

- 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	<a href="#">↗Link to Third-Party System</a>





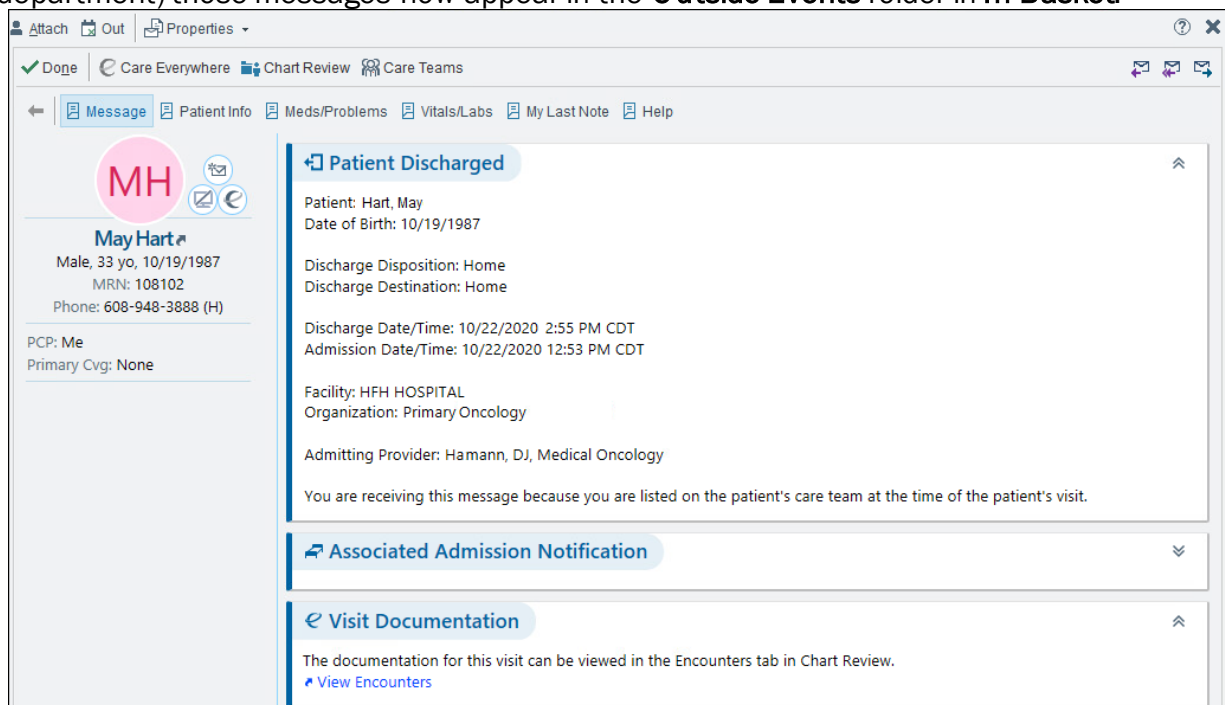
### View Event Notifications in In Basket

#### 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 **ChartSearch** hover bubble so your results can load more quickly. Instead, click **View the full document** to open it in the document viewer.

September 2019	
 Office Visit	9/16/2019
<div> <b>Office Visit</b> Metamorphosis Clinic</div> <div>9/16/2019 Received 4/29/2020</div> <div>This document is too large to show here. View the full document.</div>	





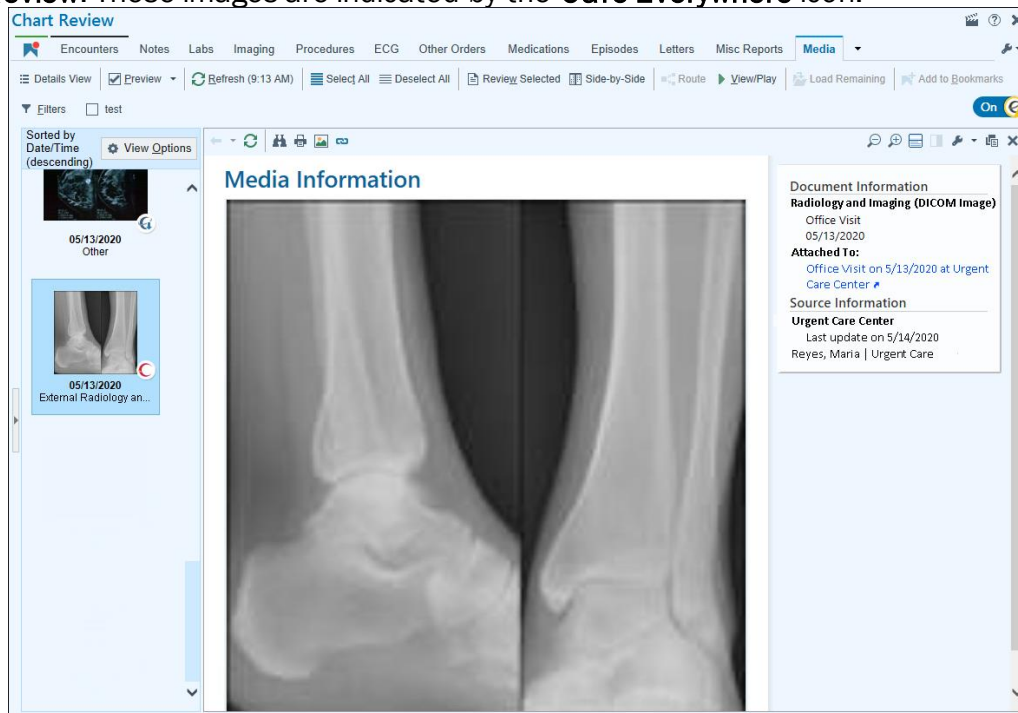
### See Images Exchanged Using Care Everywhere in Chart Review

#### 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.

**Verify Pharmacy Benefits**

Selected coverage: **None** Total coverages: 3

**Verify Pharmacy Benefits**

Selected coverage: **DOCKENDORF, TAD ALAN - PLANZ (CERT PBM-B)** Total coverages: 3

**DOCKENDORF, TAD ALAN - PLANZ (CERT PBM-B)**  
Covered: **Retail, Mail Order** Not covered: Specialty, Long-Term Care

Member ID: 07/04/1975 - M  
Group ID: LLM1 32 RANCH PASS  
Group Name: GROUPLLM1 CHEYENNE, WY 82001

**Demographics on File**  
Dockendorf, Tad A  
07/05/1975 - Male  
32 Ranch Pass  
Cheyenne, WY 82001

**DOCKENDORF, TAD A, JR - PLANA5 (CERT PBM-A)**  
Covered: **Mail Order** Not covered: Retail Unknown: Specialty, Long-Term Care

Member ID: 123456789 07/05/1975 - M  
Group ID: AA5V 32 RANCH PASS APT 105  
CHEYENNE, WY 82001

**DOCKENDORF, TAD - (CERT PBM-C)**  
Covered: **Retail** Not covered: Mail Order Unknown: Specialty, Long-Term Care

Member ID: 111111114 07/05/1975 - M  
Group ID: E000000 32 RANCH PASS  
CHEYENNE, WY 82001





### 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.**

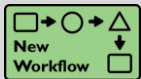
All Pharmacy Suggested Alternatives:

- 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.

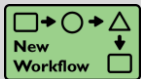
#### Description:

- 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.

A screenshot of the "Authorization Details" window in the Epic system. The window has a title bar "Authorization Details". Below the title bar, there is a section for "Prior authorization status:" with a dropdown menu showing "Denied". Below this is a "Notes" section with a text area and a toolbar containing icons for undo, redo, insert smart text, and zoom. Below the notes section is an "Attachment:" field with a search icon. At the bottom of the window, there is a checkbox labeled "Follow-up complete" which is checked and circled in red. To the right of the checkbox are "Save" and "Cancel" buttons.



### 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.

Payer Waiting for Response

[Prior Authorization Portal](#)

Deadline to reply: **August 13, 2020 7:59 AM (2 weeks ago)** Case ID: JB0706

[Start a new authorization](#)

Payer: Surescripts Generic Payer 800-555-5555 800-555-6666

Questions

Is this for a new problem or existing problem?

Does the patient have a family history of any of the following?

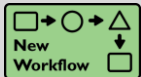
Does the patient suffer from any of the following?

Prior auth initiated by: Payer

[View History](#)



## 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.

The screenshot shows the Epic Health Maintenance interface. On the left, a sidebar contains a 'CARE GAPS' section with three items: 'Colorectal Cancer Screening', 'Lipid Panel', and 'Lung Cancer Screening'. The 'Lung Cancer Screening' item is highlighted with a green checkmark icon. Below this is a 'PROBLEM LIST (5)' section. The main content area on the right shows a 'Meningococcal Vaccine' entry at the top. Below it, a large white box with a blue border contains a red alert icon and the text 'Lung Cancer Screening'. Underneath this, it says 'Overdue since 10/23/2018 Yearly'. A section titled 'Previous Completions' follows, stating 'No completion history for this topic.' and providing a link 'View complete topic history'. At the bottom of the main content area, there is a section titled 'Health Maintenance Plans'.



## Immunizations



### 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.

**Administered Immunization**

1 Name: Influenza Virus Vaccine, Split 2 Given Delete

ID	Name
28	Influenza Virus Vaccine - Whole
9	Influenza Virus Vaccine, Split
257	Influenza, Intradermal, Quadrivalent, Preservative Free

NDC: Site: Comment:

Manufacturer: Route: Location:

Product: External:

Expires: Next due:

Are you allergic to eggs? ☐ Yes ☐ No

E-Sign Status: Not signed

Accept as Incomplete Accept Cancel





### 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:

- **ChartSearch** 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.

Search results for "acetamniophen"

acetamniophen

**ⓘ No results found for "acetamniophen". Showing results for "acetaminophen".**

All (10) | Notes | Labs | Meds (10) | Imaging | Procedures | Other Orders | Allergies | Immuniz

Active

⌵ aspirin-**acetaminophen**-caffeine (EXCEDRIN MIGRAINE) 250-250-65 MG per tablet  
⌵ Take 1 tablet by mouth every 6 hours as needed for Headaches. Disp-30 tablet, R-0 1 tablet, EVERY 6 HOURS PRN Starting Fri 4/24/2020, Routine, Oral, Normal

⌵ oxycodone-**acetaminophen** (PERCOCET) 5-325 MG per tablet  
⌵ Take 1 tablet by mouth every 4 hours as needed for Pain. Max Daily Amount: 6 tablets. Disp-30 tablet, R-0 1 tablet, EVERY 4 HOURS PRN Starting Mon 4/27/2020, Routine, Oral, Normal





## 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.

Search results for "a1c"

Search bar: a1c

Navigation tabs: All (10) | Notes (4) | Labs (5) | Meds | Imaging | Procedures | Other Orders | Allergies | Immunizations | Media | Problems (1) | Care Everywhere | Episode Tasks and Targets

Active

- Type 1 diabetes mellitus with ophthalmic complication...had an abnormal A1C Noted 7/27/2020

July 2020

- HEMOGLOBIN A1C Released 7/27/2020  
Discontinued: 7/27/2020 Reason: Duplicate
- HEMOGLOBIN A1C Collected 7/27/2020  
HEMOGLOBIN A1C 7 !
- HEMOGLOBIN A1C Collected 7/27/2020  
HEMOGLOBIN A1C 6
- Progress Notes by Nick Sperry 7/9/2020  
Went over patient's A1C
- Progress Notes by Nick Sperry 7/9/2020  
Ordered patient an A1C
- HEMOGLOBIN A1C (Preliminary result) Collected 7/9/2020  
HEMOGLOBIN A1C 5

June 2020

- HEMOGLOBIN A1C Collected 6/25/2020  
HEMOGLOBIN A1C 8 !
- Progress Notes by Nick Sperry 6/25/2020  
Went over patient's A1C results
- Progress Notes by Nick Sperry 6/25/2020  
Ordered an A1C for patient

**Spotlight**

**HEMOGLOBIN A1C**

Status: Final result

Ref Range & Units	1 mo ago 7/27/20	1 mo ago 7/27/20	1 mo ago 7/9/20
4 - 6 %	6	7 !	5 P

P=Value has a preliminary status

Specimen Collected: 07/27/20

Last Resulted: 07/27/20

[View Full Report](#)

[Leave Feedback](#)

Select a result on the left to view the report.





### 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**.

Time	Patient	Age / Sex	Visit Type	Reason	Room	Status
2:00 PM	Acanthite, Neil	31 y.o. / M	Office Visit	back pain, headaches	Room 1	Closed
	Castor, Christy	23 y.o. / F	Office Visit	new patient		Scheduled



## ABN and Medical Necessity



### 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.

**Advance Notice Form**

**Notifier:**  
**Patient Name:** Sam, Abes **Identification Number:** 107072

**Advance B**

**NOTE:** If Medicare doesn't pay for item Medicare does not pay for everything, have good reason to think you need. W

Items or Services	
(1) URINALYSIS, AUTO, W/SCOPE [81001]	(1) This condition

**WHAT YOU NEED TO DO NOW:**

- Read this notice, so you can make
- Ask us any questions that you may

Notice template:

Notice status:

Communication barriers:

Notice adjustments:

Service	Additional
1 URINALYSIS, AUTO, W/SCOPE	

**Category Select**

Search:

Title	Number
Notice Triggered	1
Notice Printed	2
ABN Signed, Service Accepted (Option 1 - Bill Medicare)	3
ABN Signed, Service Declined	6
ABN Refused--Noted on form, Signed by Two Witnesses	7
ABN Refused--Service Not Performed	8
ABN Signed, Service Accepted (Option 2 - Do not bill Medicare)	9

9 categories loaded.





## Use a New ABN Template for Dually Eligible Beneficiaries

### 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.

Advance Notice Form

• Choose an option below about whether to receive the items or services listed above.

**Note:** If you choose Option 1 or 2, we may help you to use any other insurance that you might have, but Medicare cannot require us to do this.

**OPTIONS: Check only one box. We cannot choose a box for you.**

☐ **OPTION 1.** I want the items or services listed above. ~~You may ask to be paid now, but I also want Medicare billed for an official decision on payment, which is sent to me on a Medicare Summary Notice (MSN). I understand that if Medicare doesn't pay, I am responsible for payment, but I can appeal to Medicare by following the directions on the MSN. If Medicare does pay, you will refund any payments I made to you, less co-pays or deductibles.~~

☐ **OPTION 2.** I want the items or services listed above, but do not bill Medicare. You may ask to be paid now as I am responsible for payment. I cannot appeal if Medicare is not billed.

☐ **OPTION 3.** I don't want the items or services listed above. I understand with this choice I am **not** responsible for payment, and I cannot appeal to see if Medicare would pay.

**Additional Information:**

~~This notice gives our opinion, not an official Medicare decision.~~ If you have other questions on this notice or

Notice template: **Dually Eligible Beneficiaries ABN** Comments:

Notice status: Notice Triggered [1] Time updated: 01:40 PM

Communication barriers:  Date updated: 7/16/2020

Notice adjustments:

Service	Additional Explanation for Non-coverage	Original Estimated Cost	Estimated Cost Override
1 DEBRIDEMENT		414.00	
2 MR HEAD WO IV CONTRAST		1084.00	

Print Refresh Accept Cancel



## In Basket



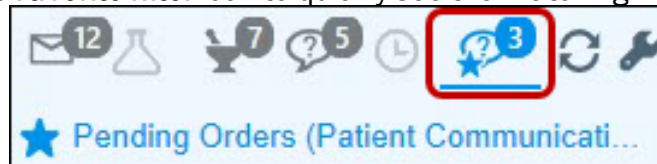
### Mark a Message Filter as a Favorite in Card View

#### 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.





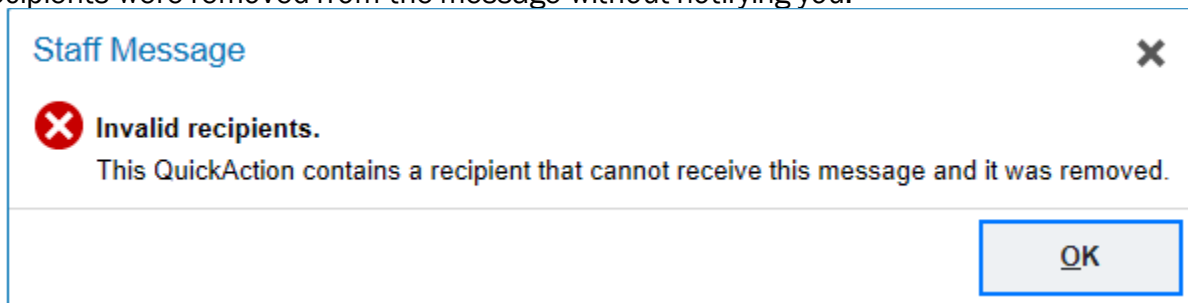
### Warning Message Appears When New Message QuickActions Include Invalid Recipients

#### 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.





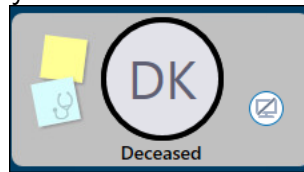
### It's Now More Obvious When You're Viewing Information for a Deceased Patient

#### 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



#### Easily See Treatment Plan and Therapy Plan Information in Storyboard

#### Key Benefits:

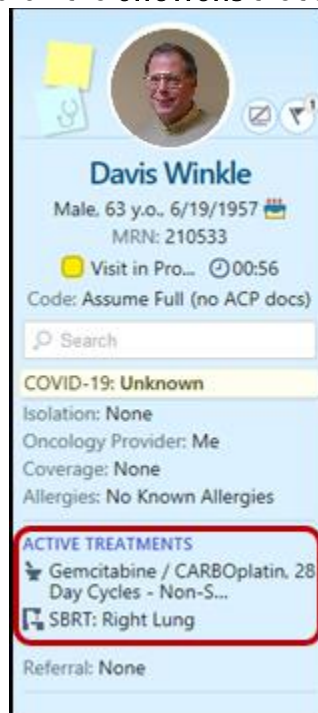
- Easily visible in Storyboard.
- More accuracy and reliability.

#### 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.





### Easily See Treatment and Therapy Plan Information in Storyboard

#### Key Benefits:

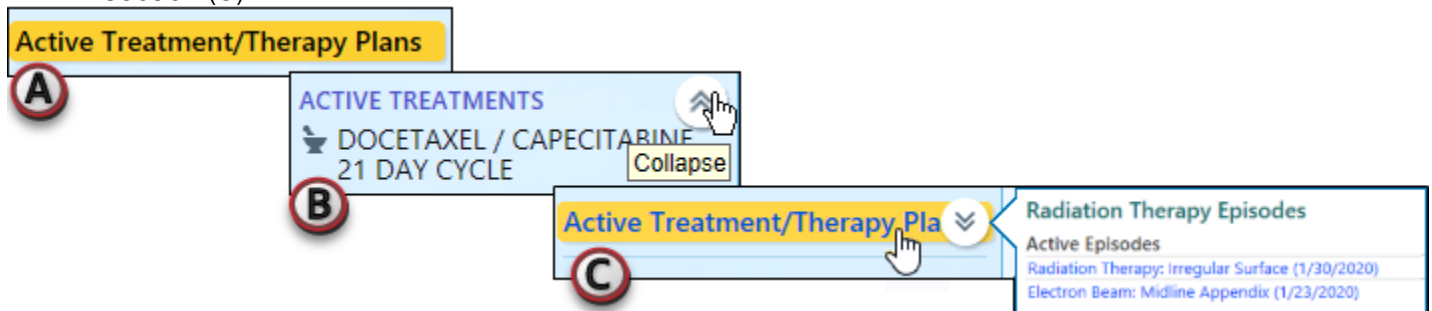
- Easily visible in Storyboard.
- More accuracy and reliability.

#### 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)



## 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.

**Insulin Instructions**

☐ Use 0.5 Units for Sliding Scale in AVS

---

**Injections**

Name	Medication	Times
<b>Mealtime Injections</b>	Insulin Aspart 100 UNIT/ML	Breakfast, Lunch, Dinner, Snack

Name:

Medication: Insulin Aspart 100 UNIT/ML [Change linked medication](#)

Mealtime	Carb Ratio (g/unit)	Sensitivity Factor (mg/dL/unit)	BG Target (mg/dL)
Breakfast	12	20	110
Lunch	14	25	110
Dinner	12	20	110
Snack	10	20	110
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Last edited by Robert Sutton, MD on 5/26/2020 at 12:14 PM





## 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		
Time	units/hr	
12:00 AM	1.65	
3:00 AM	1.5	
7:00 AM	1.5	
8:00 AM	1.55	
4:00 PM	1.6	

Blood Glucose Target		
Time	mg/dL	
12:00 AM	90 - 130	

Sensitivity Factor		
Time	mg/dL/unit	
12:00 AM	30	
6:00 AM	35	
8:00 PM	33	

Carb Ratio		
Time	g/unit	
12:00 AM	10	
12:00 PM	8.5	
4:00 PM	6.5	

**Total Basal Dose**  
37.65 units/day



## Outpatient Rehab



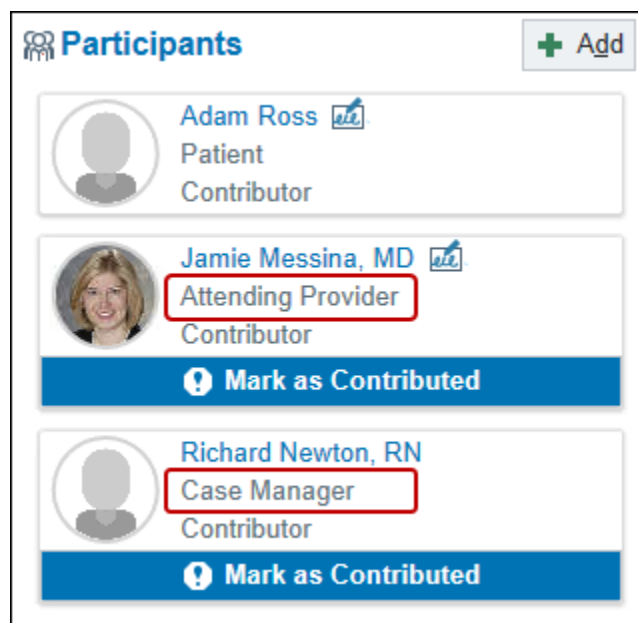
### More Accurate Provider Roles in Plan of Care

#### 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.





### 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.

Find My Plans That Need Signatures [8517862] as of Thu 2/14/2019 11:08 AM

Filters Options Edit Plan Chart View Plans Follow Up with Selected Signers Follow Up with All Signers

Patient	Plan	Effective From	Effective To	Has Prior Plan?	Remaining Signers	Finalized	Last Comm
Cobb, Todd	SPOC OP 01/05/19	01/05/2019	01/15/2019	No	Sam Rossi	01/10/2019	01/10/2019
Robbins, Norman	SPOC OP 01/04/19	01/04/2019	05/04/2019	Yes	Ron Ping	01/10/2019	01/18/2019

Participants

Name	Type
Ron Ping	Md
Contact Info: 608-777-2488	
Signature pending	
Gene Rider	Provider
Contact Info: 555-123-4567	

SPOC OP 01/04/19 Plan ID: 1419  
Effective from: 1/4/2019 Effective to: 5/4/2019

Participant Communication History

	Sent by	Comment
01/18/2019 12:22 PM	RIDER, GENE	
01/18/2019 12:17 PM	RIDER, GENE	
01/13/2019 7:00 PM	RIDER, GENE	2nd ib message
01/10/2019 10:41 AM	RIDER, GENE	

Follow Up With...

Remaining Required Signers

Ron Ping  
Phone: 608-777-2488  
Fax: 608-777-2487

Plans  
Norman Robbins SPOC OP 01/04/19 01/18/2019

New Communication

Called Resend Letter Resend In Basket

Comment

Accept Cancel





### 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.

**Chart Review**

Encounters Labs Imaging Procedures ECG Other Orders Medications Episodes Letters **Notes**

☐ Preview ☒ Refresh (8:55 AM) ☒ Select All ☐ Deselect All ☐ Review Selected ☐ Side-by-Side ☐ Route ☐ Tag ☐ Load Remaining ☐ More

☒ Filters ☒ Default filter ☐ Me ☐ Dialysis

Date of Service	Type	Author	Encounter Type	Encounter Date
Recent Notes				
01/01/2020 12:00 AM	Dialysis Plan of Care Note	Me	Plan of Care Docum...	01/01/2020
09/25/2019 2:18 PM	H&P	Me	Admission (Discharg...	07/25/2017



## Orthopedics



### 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**.

The screenshot displays the 'Relevant Summary' interface in Epic. On the left, a 'Timeline' lists events from 08/19/20 to 09/18/20. A hover bubble is shown over the '07/15/20 Office Visit' event. The bubble contains the following information:

- Office Visit** (Open)
- 7/15/2020 MR Orthopaedics Department
- Orton, Wallace MD Orthopedics
- Pelvis - Pain • Left Knee - Pain • Right Knee - Pain • Left Ankle - Pain • Vomiting
- Reason for Visit
- Progress Notes: Unsigned
- Md Mr Orton, Wallace MD (Physician) • Orthopedics
- Procedure Orders: 1. Hand / UE Inj: bilateral small finger [1000202718] ordered by Orton, Wallace MD
- Hand / UE Inj: bilateral small finger for Dupuytren's contracture on 7/15/2020 11:32 AM
- Details: 30 G needle, dorsal approach
- Additional Documentation: Encounter Info: Billing Info, History, Allergies, Detailed Report
- Orders Placed: Hand / UE Inj: bilateral small finger, LG Joint Inj
- Medication Changes: None, Medication List
- Visit Diagnoses: None, Problem List



## Ophthalmologists



### 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



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

##### Key Benefits:

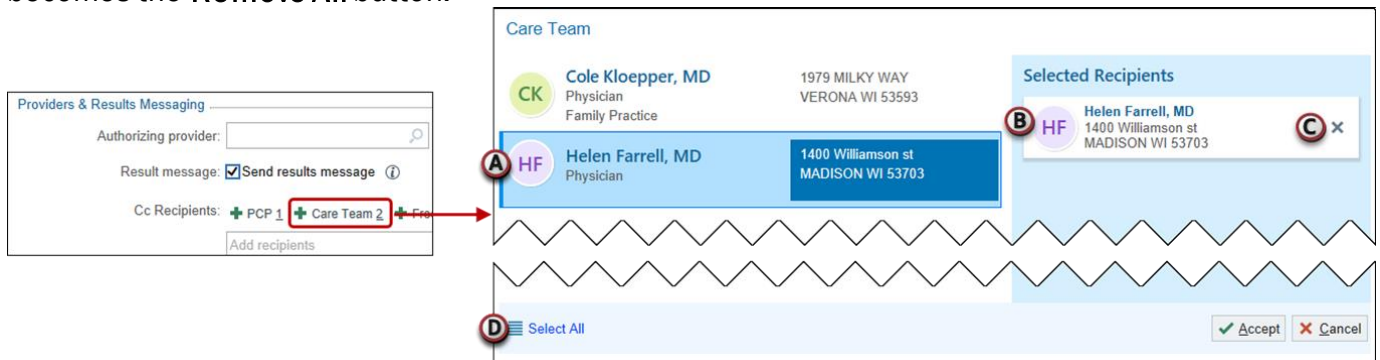
- Improved workflow.
- More efficient.

##### 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.





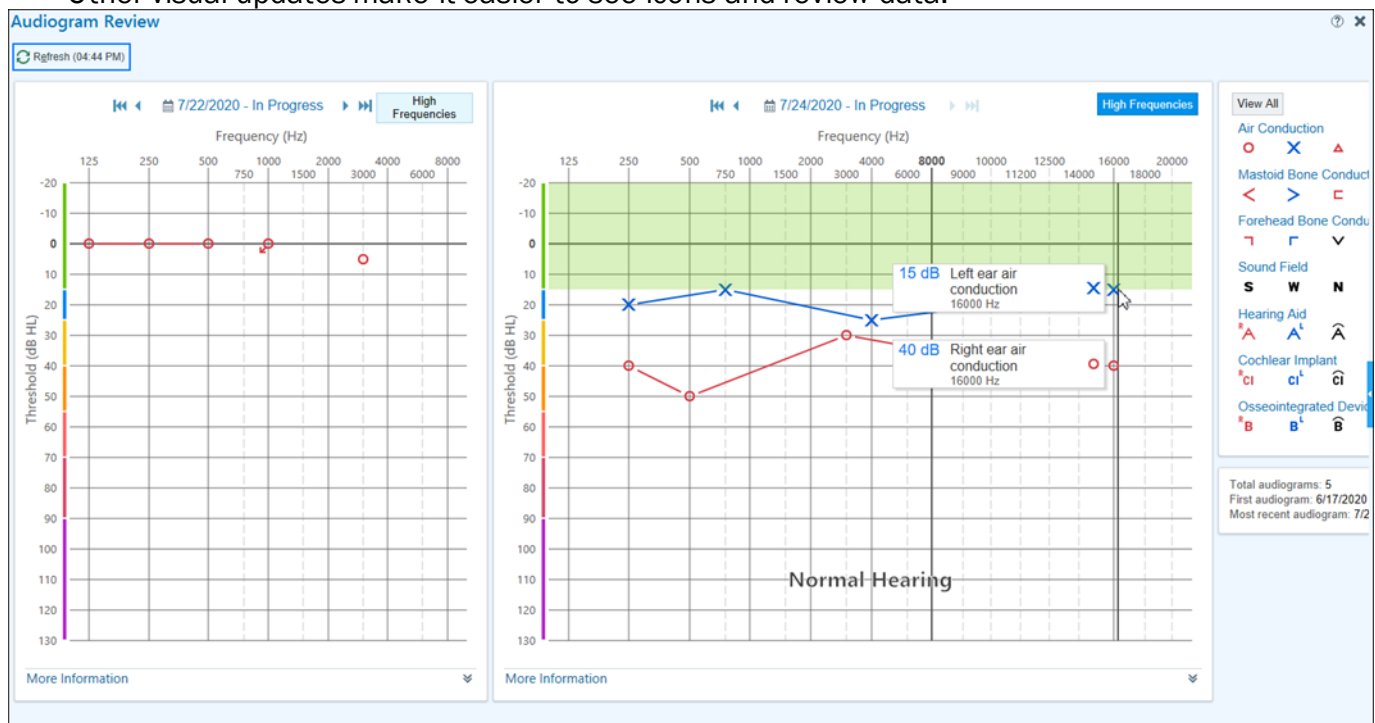
### Audiograms Now Appear in Hertz on a Logarithmic Scale

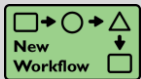
#### Key Benefits:

- 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.





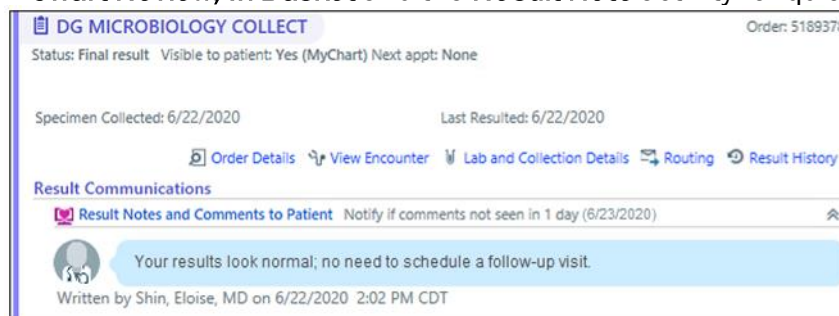
### See MyChart Result Comments in Your Workspace

#### 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.*



### 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

