

Feb. 21 Epic *Update Companion*



Ambulatory Clinical Support

Updated: 1/29/21

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:

- Nurses
- Outpatient Therapists
- Medical Assistants
- Clinic Managers
- Patient Affair Coordinators
- Other Clinical Support

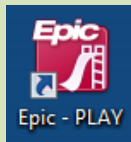
Top Changes for Role/Department:

1. [Document Domestic Travel in Travel Screenings](#)
2. [Save Clicks in Triage Calls and Telephone Encounters](#)
3. [Document That a Patient Isn't Taking a Patient-Reported Medication](#)
4. [See MyChart Result Comments in Your Workspace](#)
5. [New Break-the-Glass Icon in Reports](#)



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.





Guided Playground Practice

Exercises to help you prepare for the coming changes.

After reviewing this document, use it as a guide to see the new features for yourself in the Epic Playground. Playground practice helps you prepare for the update so you can stay focused on patient care.

Playground User ID:

- Nurses and other clinical support staff: **Nurse00**
- Therapists: **OPPT00**

Playground Password: **train**

Key workflows for you to practice include:

Simple searches for allergies:

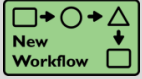
- When adding a new allergy, search results now appear in a drop-down list instead of a separate window. The **Full Search** check box that's used to include uncommon allergies in your search, appears next to the search bar.
 - In the **Allergies** section, add "sulfa antibiotics". Hint: Use completion matching (like "sulf") for faster look up. **Accept** the new entry. Mark allergies as reviewed.

A quick click to message a patient:

- Open the **In Basket Activity**. Send a new **MyChart** message to a patient from **In Basket**, using fewer clicks.
- Set up a **QuickAction** for the **Patient Message** button. Example: Set up a **QuickAction** to reply to a patient and tell them to schedule an appointment.



Key Updates



Document Domestic Travel in Travel Screenings

Key Benefits:

- More efficient.
- Patient safety.

Description:

States now appear alongside countries when you click the **Add Travel** button. Use the newly worded **Travel History** question to help patients recall any recent interstate travel.

The screenshot shows the 'Travel History' section of a form. At the top, there is a question: 'Have you traveled internationally or domestically in the last month?'. Below this question are three buttons: 'Yes' (highlighted in blue), 'No', and 'Unable to assess'. To the right of these buttons is a small document icon. Below the question and buttons is a text input field labeled 'Enter a location' followed by a '+ Add Travel' button. Below this is a table with three columns: 'Location', 'Start Date', and 'End Date'. The first row of the table has a red box around the 'Alaska (United States of America)' entry in the 'Location' column. Below the table, there are 'Delete', 'Accept', and 'Cancel' buttons.

Location	Start Date	End Date
Alaska (United States of America)	08/30/2020	09/30/2020





Document That a Patient Isn't Taking a Patient-Reported Medication

Key Benefits:

- Improved workflow.
- Time saver.

Description:

You can now document when your patient isn't taking a patient-reported medication (**person** icon) just like you do for a prescription (**house** icon).

How to:

Click the **Not Taking** button. **Patient not taking** appears highlighted in **yellow** in the sig, just like it does for prescription medications.

Medication Review

Add Medication

View by: Alphabetical

Pharmacy:

Alphabetical

cetirizine (Zyrtec) 10 MG tablet

Take 10 mg by mouth in the morning.

Patient not taking. Reported on 8/13/2020 Last Dose: Not Taking at Unknown time

Not Taking Add Med Note

If the patient is not taking this medication as shown, document the updates below.

Product: **cetirizine (Zyrtec) 10 MG tablet**

Dose: mg

Route:

Frequency:

Duration: Starting: Ending:





Simple Searches for Allergies

Key Benefits:

- More efficient.

Description:

When you're adding a new allergy, search results now appear in a drop-down list instead of a separate window. The **Full Search** check box (use this to include uncommon allergies in your search) now appears next to the search bar.

% Allergen	Allergen Type
<input checked="" type="checkbox"/> IBUPROFEN	Drug Ingredient
<input type="checkbox"/> IBUPROFEN-FAMOTIDINE	Drug
<input type="checkbox"/> HYDROCODONE-IBUPRO...	Drug
<input type="checkbox"/> OXYCODONE-IBUPROFEN	Drug

Search Recent





Save Clicks in Triage Calls and Telephone Encounters

Key Benefits:

- Time saver.

Description:

Use new speed buttons in the **Contract** section and click the **wrench** icon to change them. Document and review **Disposition** information without clicking to open the section.

The screenshot displays two overlapping windows from the Epic EHR system. The top window is titled "Contract" and contains a "Contract Wizard" section with a search bar for "Select contract" and a dropdown menu showing "FITCHBURG PEDIATRICS" and "PGM Primus Contractus". The bottom window is titled "Disposition" and features a table with the following data:

Date	Time	Disposition	Department	Location/POS	Fax?	Comments
8/21/2020	09:13 AM	Call PCP within 24 hours				

Below the table are buttons for "New", "Edit", and "Delete", and a set of numbered buttons: "1 Emergency", "2 Urgent Care", and "3 Schedule". A question "What would patient/caregiver have done without intervention?" is followed by buttons: "Gone to ER", "Call 911", "Emergency Department", "Home Care" (highlighted), and "Made an Appointment". Below this is a search bar containing "Home Care". Another question "Patient/caregiver understands and will follow disposition?" is followed by buttons: "Yes" (highlighted), "No", "Unsure", "Yes", and "No". A search bar at the bottom contains "Yes".





See MyChart Result Comments in Your Workspace

Key Benefits:

- More efficient.

Description:

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

A screenshot of a MyChart result page for "DG MICROBIOLOGY COLLECT" (Order: 5189378). The page shows the status as "Final result" and "Visible to patient: Yes (MyChart)". It includes specimen collection and result dates of 6/22/2020. A "Result Communications" section is visible, containing a "Result Notes and Comments to Patient" entry with a notification to notify if comments not seen in 1 day (6/23/2020). A comment bubble from a user profile (Shin, Eloise, MD) states: "Your results look normal; no need to schedule a follow-up visit." The comment is dated 6/22/2020 at 2:02 PM CDT. Navigation links for Order Details, View Encounter, Lab and Collection Details, Routing, and Result History are also present.





Send Message Responses to the Pool for Replies

Key Benefits:

- Time saver.
- More efficient.

Description:

When routing a patient call or prescription refill message, you can now direct responses back to a pool so the message's follow-ups can be resolved more quickly. Look for the **Pool for Replies** field in **In Basket**, **Card View**, and the routing section of telephone encounters. When your recipient clicks **Reply**, the pool you selected automatically appears in the recipient field.

The screenshot shows the 'Rx Request' interface. At the top right, there are 'High' and 'Low' priority buttons. Below that is a '+ My List' dropdown. A search bar labeled 'Enter recipients' contains a red exclamation mark icon and a magnifying glass icon. Below the search bar, the 'Pool for Replies' field is highlighted with a red box; it contains an information icon, the text 'Pool for Replies:', and a button labeled 'Add a pool'. To the right of this field is a '+ P Surescripts Admin Pool' button and a 'More' dropdown. At the bottom of the interface, the subject line 'RE: Rx Auth Request' is visible.





Clearer Information for Entering Dose Quantities in Lot Manager

Key Benefits:

- More efficient.
- Improved workflow.

Description:

For clarity, **Lot Manager** tracks the number of individual doses remaining of a vaccine. **Doses Remaining** now appears throughout **Lot Manager** workflows instead of **Quantity**. This helps clarify that you should enter the number of doses, not the number of available vaccine vials. Many vaccines, including Pfizer and Moderna COVID-19 vaccines, come in multi-dose vials. When using **Lot Manager**, you must determine the number of doses per vial and enter the total number of doses.

Example: You're entering the **Lot** number for a shipment of Moderna vaccines. The shipment contains 500 vials, each of which contains five doses. You will enter 2500 in the **Doses Remaining** field.

The screenshot shows the 'Lot Manager' interface. At the top, there's a 'Storage unit' dropdown set to 'NORTH CLINIC REFRIGERATOR 1'. Below that is an 'Add lots' button with a plus sign. The main area shows a 'Track Doses Remaining?' section with 'No' and 'Yes' buttons. A 'Doses Remaining' field is highlighted with a red circle, and a 'Change Reason' dropdown is next to it. Below this is a table of 'Current Lots' with columns: Lot, Immunization, Manufacturer, NDC, Expiration, Product, VFC, and Doses Remaining. The first row shows Lot '981035A', Immunization 'COVID MODERNA', Manufacturer 'Moderna', NDC '0002-0003-04', Expiration '12/31/2021', Product 'Moderna', VFC '☐', and a plus sign in the 'Doses Remaining' column. The 'Doses Remaining' column header is also highlighted with a red circle. At the bottom right, there are 'Accept' and 'Cancel' buttons.





Track and Follow Up on Outpatient Plans of Care

Key Benefits:

- Less clicks.
- Time saver.

Description:

It's now simpler for therapists, managers and other support staff to stay on top of plans of care. New reports now show plans that need signing or recertification, filtered by therapist or by department, and the new follow-up communication activity makes sending reminders to providers who haven't signed a matter of three clicks.

How to:

1. Use **Follow Up** buttons to send reminders to providers who haven't signed. These buttons open the **Follow Up** communication sidebar.
2. Click to resend letters, **In Basket** messages or to note that you called.
3. Click **Accept**.
4. Check who's followed up in the **Last Comm** column and **Communication History**.

The screenshot displays the Epic software interface for tracking outpatient plans. At the top, a search bar shows 'Find My Plans That Need Signatures [8517862] as of Thu 2/14/2019 11:08 AM'. Below this is a table of plans with columns for Patient, Plan, Effective From, Effective To, Has Prior Plan?, Remaining Signers, Finalized, and Last Comm. The 'Last Comm' column for Norman Robbins is highlighted with a red box and a '1'. To the right, a sidebar titled 'Remaining Required Signers' shows details for Ron Ping, including his name, phone, fax, and a 'New Communication' section with buttons for 'Called', 'Resend Letter', and 'Resend In Basket', the latter being highlighted with a red box and a '2'. Below the table, a 'Participant Communication History' sidebar shows a list of messages sent to Ron Ping, with a red box and a '4' highlighting the 'Follow Up with Signers' button. At the bottom right, an 'Accept' button is highlighted with a red box and a '3'. The main table data is as follows:

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





Write Notes from In Basket in a Clean, Focused Workspace

Key Benefits:

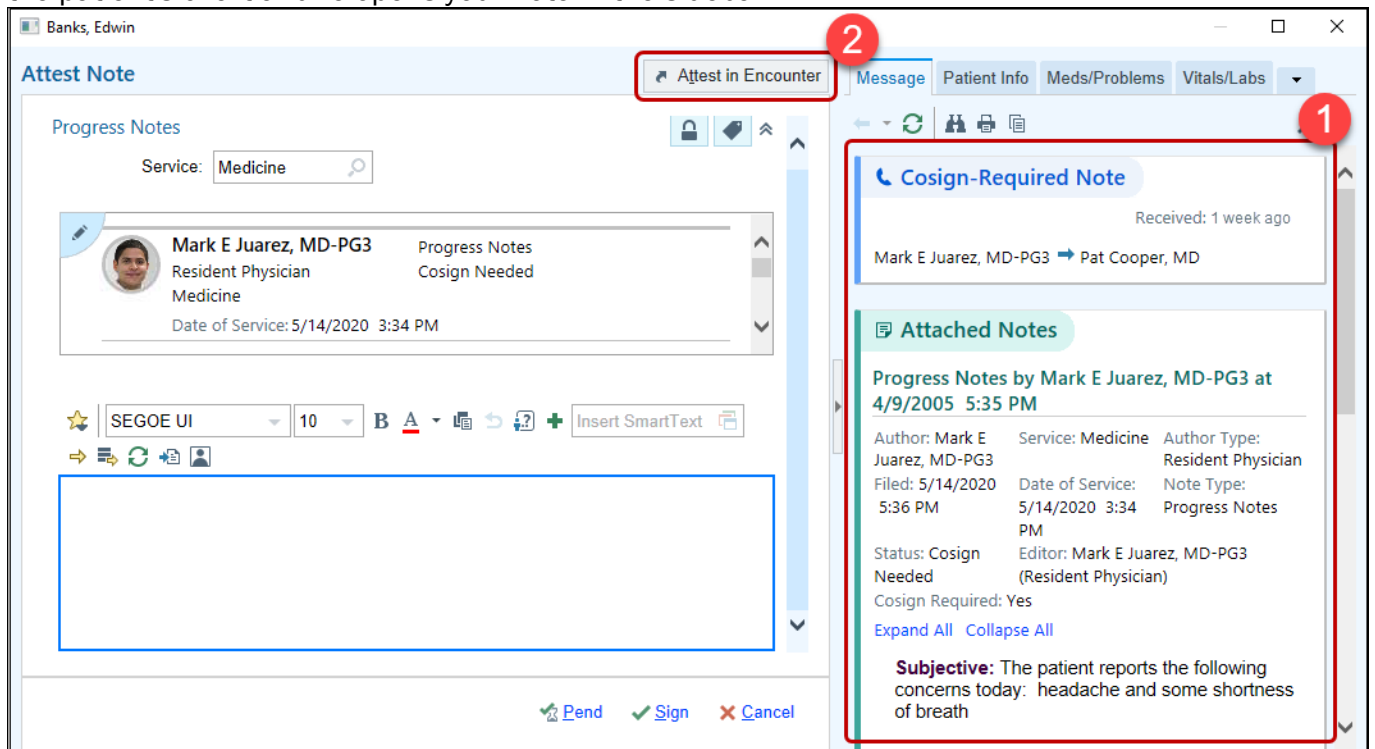
- Improved workflow.
- Time saver.

Description:

When editing or attesting notes from **In Basket**, the note editor now displays as a floating window. If you only use the window, you must sign, pend or cancel the note to close the window and work elsewhere. This helps you focus on that note and keeps your workspace clean, instead of having your list of **In Basket** messages, selected message contents and a sidebar note editor all open at the same time.

How to:

1. Review **In Basket** reports to the right of your note.
2. **Edit in Encounter** and **Attest in Encounter** buttons. If you need to review information that isn't included in the **In Basket** reports, clicking either button pends your in-progress note, brings you to the patient's chart and re-opens your note in the sidebar.





Set Patient-Specific Due Dates for Health Maintenance

Key Benefits:

- More efficient.

Description:

If a health maintenance topic shouldn't be addressed until a certain date, you can now enter a specific due date for that topic and patient.

- Example: Your patient recently received a colonoscopy. Based on the results, the provider wants the patient to have another screening in a year, but he/she can receive a fecal occult blood test (FOBT) instead of another colonoscopy. Normally, the colonoscopy would satisfy the patient's screening for the next ten years. Now, you can specify that your patient needs FOBT tests yearly and can set the first due date to one year from now.

How to:

1. Click **Edit Follow-up** from the **Address Topic** window.
2. Set a patient-specific **Due Date** for the health maintenance topic.

Address Topic

Colorectal Cancer Screening
Follow-up will be updated

Add Completion Discontinue **Edit Follow-up**

Screening Type: FOBT Frequency: 1 year(s)

FOBT will be preferred but other screenings can be accepted

Due Date: 1/16/2021

Reason for Edit: [Warning Icon]

Comments: [Text Area]

Last edited by Tula Thompson, MD on 1/16/2020.

Next due on 1/16/2021 [Accept] [Cancel]





Automatic Selection of Coverages Makes Prior Authorization More Available

Key Benefits:

- Time saver.

Description:

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

The screenshot displays the 'Verify Pharmacy Benefits' interface. At the top, it shows 'Selected coverage: None' and 'Total coverages: 3'. Below this, three coverage options are listed, each with a 'Selected coverage' indicator and 'Total coverages: 3'.

Member Name	Coverage Type	Member ID	Group ID	Group Name	DOB	Address
DOCKENDORF, TAD ALAN - PLANZ (CERT PBM-B)	Selected coverage: DOCKENDORF, TAD ALAN - PLANZ (CERT PBM-B)	07/04/1975 - M	LLM1	GROUPLLM1	07/04/1975 - M	32 RANCH PASS CHEYENNE, WY 82001
DOCKENDORF, TAD A, JR - PLANA5 (CERT PBM-A)	Covered: Mail Order	123456789	AA5V		07/05/1975 - M	32 RANCH PASS APT 105 CHEYENNE, WY 82001
DOCKENDORF, TAD - (CERT PBM-C)	Covered: Retail	111111114	E000000		07/05/1975 - M	32 RANCH PASS CHEYENNE, WY 82001

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





Chart Search Finds Closely Matching Results

Key Benefits:

- Time saver.

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 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 | Immunizations

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





Document by Region During Musculoskeletal Exams

Key Benefits:

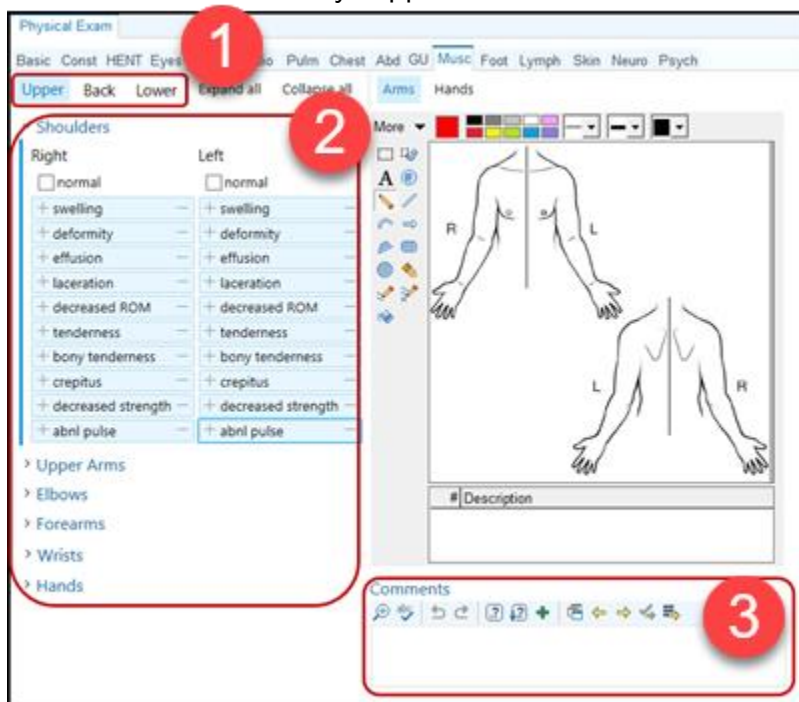
- More efficient.

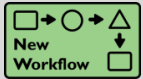
Description:

When documenting a physical exam in the musculoskeletal form, open region-specific tabs to complete your documentation.

How to:

1. Open the **Upper**, **Back** and **Lower** tabs to complete your documentation.
2. These region-specific tabs contain sections for each region's anatomical areas, and in each section you can click on your findings.
3. The **Comments** box always appears below the annotated images.





Decide Whether to Keep the Message for a Completed Prior Authorization

Key Benefits:

- Improved workflow.

Description:

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

How to:

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

A screenshot of the 'Authorization Details' form in Epic. The form includes a 'Prior authorization status' dropdown menu set to 'Denied'. Below this is a 'Notes' section with a rich text editor toolbar containing icons for undo, redo, bold, italic, link, unlink, and a plus sign, along with a text input field for 'Insert SmartText' and a zoom level dropdown set to '100%'. At the bottom of the form, there is an 'Attachment' field, a 'Preview' button, and an 'Import/Scan' button. A red circle with the number '1' highlights the 'Follow-up complete' checkbox, which is currently checked. To the right of the checkbox are 'Save' and 'Cancel' buttons.



Bookmark Outside Encounters in Chart Review

Key Benefits:

- More efficient.
- Improved communication.

Description:

Reviewing encounters from outside sources can give you a broader view of the patient's care and fill in gaps. Now, you can bookmark and add comments to outside encounters to easily reference later on the **Bookmarks** tab, alongside any other bookmarked chart data.

How to:

1. Click the **Bookmarks** icon.
2. Add a comment about an outside encounter and revisit the information later on the **Bookmarks** tab.

Chart Review

Encounters Labs Imaging Procedures ECG Other Orders Medications Episodes L

Preview | Refresh (1:35 PM) | Select All Deselect All | Review Selected Side-by-Side Synopsis

Filters Default filter Family Practice Initial Department Admissions Excl My Encounters

When	Type	With	Description
04/30/2020	Patient Message	FP - Shin, E	
04/26/2020	Office Visit	Audiology - McKinley, R	Abnormal otoacoustic emissio
	Admission for tonsillitis		
03/20/2020	ED	EM - Alice Tsui, MD	Acute tonsillitis due to infectio
03/05/2020	Office Visit	FP - Jones, J	Bilateral low back pain without





New Look and Features for the Care Everywhere Outside Records Activity

Key Benefits:

- Time saver.

Description:

The **Care Everywhere Outside Records** activity was redesigned, making relevant patient information easier to access and to be more consistent with **Chart Review**. There are three tabs, **Overview**, **Documents** and **Results**.

How to:

1. The **Overview** tab helps you quickly find key information for your patient.
2. In **Documents** tab, you can preview documents and create quick filters.
3. Use the **Results** tab to view and filter results. This is more consistent with the **Labs** tab in **Chart Review**.

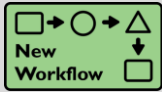
The image displays three overlapping screenshots of the Care Everywhere interface, illustrating the new look and features for the Outside Records activity. Red boxes and numbers 1, 2, and 3 highlight the Overview, Documents, and Results tabs, respectively.

Screenshot 1 (Overview): Shows the patient's overview information for River Hills Health Care. Key details include: Updated 09/23/20, Last Known Encounter: 09/03/20, Patient Authorization Required, and a link to Collect Authorization. The Summary section lists Clinical Summary, Care Plan, and Dialysis Summary. The Documents section lists History, Office Visit, and another History. The Results section lists ASSAY NON-ENDOCRINE RECEPTOR, CT SCAN, PELVIS, W/O CONTRAST, and SONO ABDOMEN LIMITED.

Screenshot 2 (Documents): Shows the Documents tab with a table of documents. The table has columns for Date, Type, Specialty, Providers, Source, and Description. A document from Yesterday is listed as Clinical Summary from River Hills Health System.

Screenshot 3 (Results): Shows the Results tab with a table of lab results. The table has columns for Date/Time and Order. Results include ASSAY FERRITIN (02/20/2020), LAB URINALYSIS (11/04/2019), and ASSAY NON-ENDOCRINE RECEPTOR (06/20/2012 11:23 AM). A red banner indicates 'Update unsuccessful'.





Restart Prescription Prior Authorizations After Questionnaire Deadlines Have Passed

Key Benefits:

- Improved workflow.

Description:

If the deadline to respond to an authorization's question set has passed, you can now restart the authorization with a simple 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](#)





Dually Eligible Beneficiaries ABN Form Now Appears Automatically

Key Benefits:

- Time saver.

Description:

You don't have to manually select the **Dually Eligible Beneficiaries ABN** form – it now appears automatically. This makes it easier to give patients who are eligible for both Medicare and Medicaid the proper form.

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	





Don't Mark ABN's As Void

Key Benefits:

- Time saver.

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.

The screenshot shows the 'Advance Notice Form' interface. At the top, it displays 'Notifier: Patient Name: Sam, Abes' and 'Identification Number: 107072'. Below this is a section for 'Advance B' with a note: 'NOTE: If Medicare doesn't pay for item Medicare does not pay for everything, have good reason to think you need. W'. A table titled 'Items or Services' contains one row: '(1) URINALYSIS, AUTO, W/SCOPE [81001]' with '(1) This condition' in the adjacent column. Below the table is a 'WHAT YOU NEED TO DO NOW:' section with two bullet points: 'Read this notice, so you can make' and 'Ask us any questions that you may'. Further down are fields for 'Notice template: Provider ABNs', 'Notice status: Notice Triggered [1]', and 'Communication barriers:'. A 'Notice adjustments:' table has one row: '1 URINALYSIS, AUTO, W/SCOPE'. A 'Category Select' dialog box is open over the form, showing a search bar and a list of categories. The first category, 'Notice Triggered', is selected and highlighted in blue. The list includes: '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), and 'ABN Signed, Service Accepted (Option 2 - Do not bill Medicare)' (9). At the bottom of the dialog box, it says '9 categories loaded.' and has 'Accept' and 'Cancel' buttons.





Review Patient Information Quickly in the Immunization Clinic

Key Benefits:

- Time saver.

Description:

You now have easy access to more patient information in the **Immunization Clinic**. When you open **Immunization Clinic**, a report appears on the right side of the screen. The preview report appears by default, below or to the right of the schedule.

The screenshot displays the Epic Immunization Clinic interface. On the left, a patient information card for 'Hess, Ivy' is shown, including age (65 yo), gender (Female), and DOB (1/27/1955). Below this, a vaccination record for 'PFIZER COVID-19 VACCINE' is visible, with a date of 12/7/2020 and a site of 'Left arm'. A 'Show Interactions' section contains two questions: 'Is the person to be vaccinated sick today?' and 'Has the person to be vaccinated ever had a serious reaction to a vaccine in the past?', both with 'Yes' and 'No' options. At the bottom of this section are buttons for 'E-Sign', 'Status: Not signed', 'Select Patient', 'Administer', and 'Cancel'.

On the right, a summary report titled 'Immunization Clinic' is displayed. It includes sections for 'Upcoming Health Maintenance' (listing MAMMOGRAM, Diabetes: Hemoglobin A1c, and SARS-CoV-2 vaccines with due dates and status), 'Current Immunizations' (listing a PFIZER COVID-19 VACCINE on 11/8/2020), 'Allergies' (Not on File), 'Outpatient Medications' (None), and 'Problem List' (listing Type 2 diabetes mellitus without complication).





Health Maintenance Lends a Hand to the Immunization Clinic

Key Benefits:

- More efficient.
- Patient safety.

Description:

You now have more information available in the **Immunization Clinic** to help you select the correct vaccine for subsequent doses in a multi-dose immunization series, such as the SARS-CoV-2 (COVID-19) vaccines.

How to:

1. The patient's **Health Maintenance** status for the selected vaccine appears in the header.
2. A warning appears if the selected vaccine isn't clinically indicated.

The screenshot displays the Epic Immunization Clinic interface for patient Hess, Ivy. At the top, a header shows patient information: Name (Hess, Ivy), Age (65 yo), Gender (Female), DOB (1/27/1955), MRN (1315734), and links for Chart Review, Allergies, and Immunizations. A status bar indicates '2 of 2 - Pfizer 2-Dose Series' and 'Dose 2 - Overdue since 12/6/2020'. A yellow warning banner states: 'MODERNA COVID-19 VACCINE is not indicated for dose 2 of 2 - Pfizer 2-Dose Series.' The main form includes fields for Vaccine (MODERNA COVID-19 VACCINE), Site (Left arm), Lot #, Date (12/7/2020), Dose (0.5 ml), Route (Intramuscular), Billing Dx (COVID-19 [U...]), Mfg, Given By (FXP VELAZ...), VIS Publish Date, Sup Prov, NDC, Product, and Exp Date. A comment field is also present. On the right, there are two questions: 'Is the person to be vaccinated sick today?' and 'Has the person to be vaccinated ever had a serious reaction to a vaccine in the past?', each with Yes/No buttons. At the bottom, there are buttons for E-Sign, Status: Not signed, Select Patient, Administer, and Cancel.





A Quick Click to Message a Patient

Key Benefits:

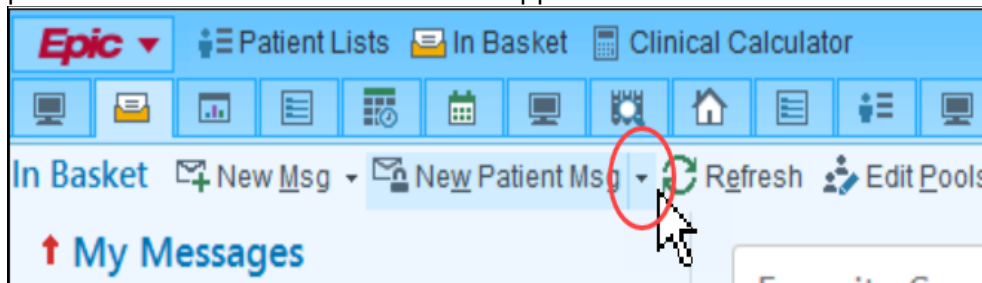
- Time saver.

Description:

You can send a new **MyChart** message to a patient from **In Basket** with fewer clicks.

How to:

1. Set up a **QuickAction** for the **Patient Message** button. Example: Set up a **QuickAction** to reply to a patient and tell them to schedule an appointment.





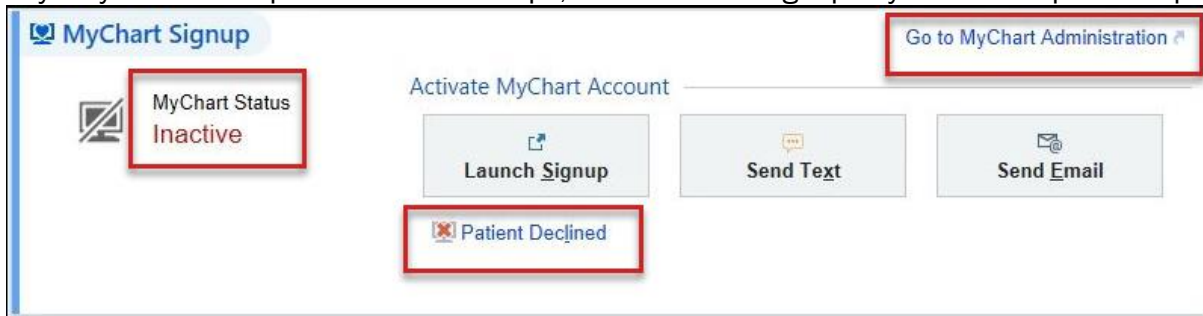
New Look to Quickly Activate Patients with MyChart Signup

Key Benefits:

- More efficient.
- Time saver.

Description:

Your patient's current **MyChart** status and the **Launch Signup**, **Send Text** and **Send Email** buttons are now more prominent so you can quickly identify if a patient is **MyChart** active and complete tasks to help them sign up. The **Patient Declined** sign-up option now appears below the more prominent sign-up buttons, since it is used less often. The updated navigator section contains a link to the **MyChart Administration** activity so you can complete other follow-ups, such as creating a proxy relationship for the patient.



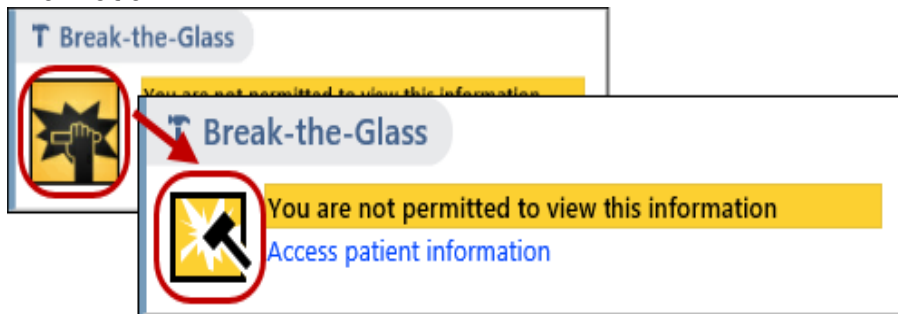
New Break-the-Glass Icon in Reports

Key Benefits:

- More efficient.

Description:

A cleaner visual cue in your reports lets you know when you need to break the glass to access patient information.





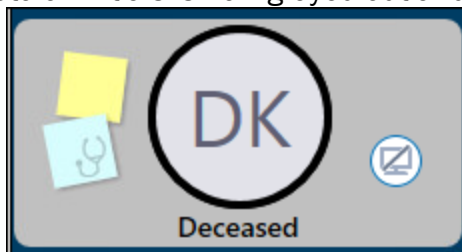
It's Now More Obvious When You're Viewing Information for a Deceased Patient

Key Benefits:

- Time saver.

Description:

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



FRAIL Questionnaire Now Available

Key Benefits:

- More efficient.
- Patient safety.

Description:

A new questionnaire based upon the FRAIL scale is now available to help you assess a patient's frailty after surgery. **Note:** You can assign patients this questionnaire in **MyChart**.

FRAIL Questionnaire

Attached to a message from Dr. Matt Jones received 7/31/2020

* Indicates a required field.

Fatigue

* How much of the time during the past 4 weeks did you feel tired?

All of the time Most of the time Some of the time A little of the time None of the time

Continue Finish later Cancel

Morley JE, Malmstrom TK, Miller DK. A simple frailty questionnaire (FRAIL) predicts outcomes in middle aged African Americans. J Nutr Health Aging. 2012 Jul;16(7):601-8. doi: 10.1007/s12603-012-0084-2. PMID: 22836700; PMCID: PMC4515112.





See Patient-Entered Responses to the GAD-7 Assessment

Key Benefits:

- More efficient.
- Improved communication.

Description:

A questionnaire based on the **Generalized Anxiety Disorder Assessment (GAD-7)** is now available for patients to fill out in **MyChart**. When the questionnaire is complete, responses appear in the **GAD-7** flowsheet in Epic.

The screenshot shows the Epic Flowsheets interface. At the top, there are navigation options: File, Add Rows, LDA Avatar, Add Col, Insert Col, Data Validate, Hide Device Data, and Last Filed. Below this, there are tabs for Data, Patient-Reported, and GAD-7 Anxiety Scale (highlighted with a red box). Under the Patient-Reported tab, there are radio buttons for Expanded and View All (selected). To the right, there are time filters: 1m, 5m, 10m, 15m, and 30m. Below the tabs, there is a search bar with the text "Search (Alt+Shift+Comma)" and an appointment dropdown menu showing "Appointment from... 10/15/20 1208". The main content area displays the GAD-7 assessment results with the question: "Over the last 2 weeks, how often have you been bothered by any of the following problems?". The results are as follows:

Problem	Frequency
Feeling nervous, anxious, or on edge	2
Not being able to stop or control worrying	3
Worrying too much about different things	2
Trouble relaxing	1
Being so restless that it is hard to sit still	2
Becoming easily annoyed or irritable	3
Feeling afraid as if something awful might happen	2
GAD-7 Total Score	15

Below the table, there is a section titled "If you checked off any problems on this questionnaire," followed by a question: "How difficult have these problems made it for you..." with a dropdown menu showing "Very difficult".





SmartPhrase Manager Has a New Look and Streamlined Workflow

Key Benefits:

- Improved workflow.
- Time saver.

Description:

It's now easier to search, share and copy **SmartPhrases**.

The screenshot shows the SmartPhrase Manager interface for user MD, ROBERT SUTTON [50001]. The interface includes a navigation sidebar on the left with options like SmartTexts, SmartLists, SmartPhrases, Manage Phrases, SmartLinks, and Find SmartLinks. The main area displays a table of SmartPhrases with columns for Name, Description, Editors, and ID. The table contains four entries: CLINEXAM, BASEEXAM, FINALASSESS, and CLINSCREEN. The CLINEXAM entry is highlighted.

Name	Description	Editors	ID
CLINEXAM	CLINICAL: Screening examination. Clinical breast examination performed by the technologist toda...	MD, ROBERT SUTTON	101634
BASEEXAM	CLINICAL: This is a baseline examination. *** FINDINGS: Bilateral XCCL, CC, and MLO views wer...	MD, ROBERT SUTTON	101635
FINALASSESS	FINAL ASSESSMENT: BIRADS: Category 0 - Incomplete. The imaging department will send a lett...	MD, ROBERT SUTTON	101636
CLINSCREEN	CLINICAL: Screening. Clinical breast exam performed by the technologist today was negative for...	MD, ROBERT SUTTON	101637

