

Feb. 21 Epic *Update Companion*



Scheduling – Registration – Template Builders

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:

- Scheduling
- Registration
- Template Builders

Top Changes for Role/Department:

1. [Scan Driver's Licenses in Patient Lookup.](#)
2. [Copays for Video Visits and E-Visits are Now Charged During Check-In.](#)
3. [Template Builder Updates.](#)
4. [Manage Referral Assignments with a Refreshed Look.](#)
5. [A New Look for Department Appointments Report Settings](#)



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: **cadsched00**

Playground Password: **train**

Playground Dept: **Fam Med SL**

Key workflows for you to practice include:

- Make an appointment for Wendy Aberdeen to view the updated **Appointment Review** screen.
- Go to the **DAR** for Wendy Aberdeen to view the updated **Department Appointment Report** settings.
- **Cancel/Reschedule** the appointment for Wendy Aberdeen to view the updates **Cancel/Reschedule** screen.
- Go to Billing Activities, select **Cash Drawer** to view the updated **Cash Drawer**.



Patient Look Up



Scan Driver's Licenses in Patient Lookup

Key Benefits:

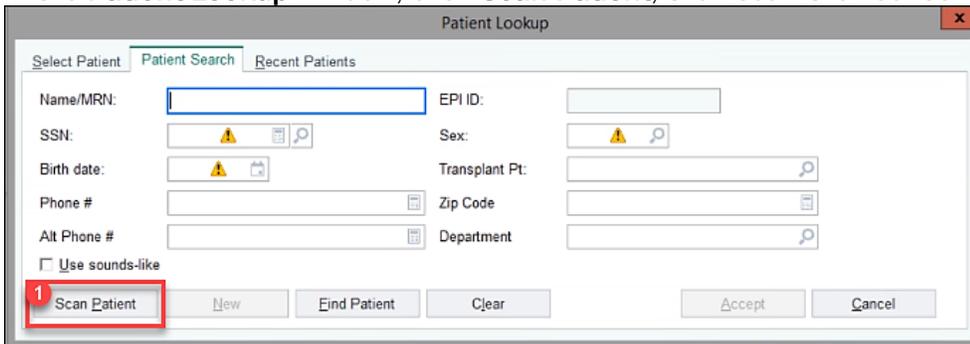
- Patient safety

Description:

- Save time by scanning a patient's driver's license to look them up rather than typing in their information.

How to:

1. In the **Patient Lookup** window, click **Scan Patient**, then scan the license.



2. Using the **Bar Code Reader**, scan the bar code on the patient's driver's license.



3. Epic uses the first and last name, date of birth, legal sex, and address from a patient's license to search for patients.
4. If the driver's license information doesn't match any patients in the system, the patient's name, legal sex, and date of birth is populated in the **Patient Lookup** window so you can create a new patient record if necessary.



Follow the appropriate steps to search for and assign the correct patient medical record.



Today's Patients Report



Today's Patients Report Now Modernized and Organized

Key Benefits:

- Patient safety
- More efficient

Description:

- It's now easier to see the patient's demographics, current encounter and upcoming encounters for the day. You can immediately take action to admit, check in or register the patient.
- Now, encounters are neatly organized in sections that help orient you as you search for a particular encounter.

How to:

1. The most relevant encounter, which is either the patient's current encounter, their next encounter or their most recent encounter appears in the left column.
 - a. As you're signing in, checking in and admitting patients throughout the day, the buttons for these **actions** now show up just under the encounter information instead of at the bottom of the window.
 - b. A button's size is determined by how likely you are to select it for a given encounter, so it's easy to see the next step.
 - c. Similar-sounding and similar-looking names are now emphasized with bold, italics or highlighted text in the list of patients. The additional emphasis helps make sure you're choosing the correct patient.



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2. Other encounters for the day, leaves of absences and schedulable orders appear in the right column.

Today's Patients Report - HM TPR-All Patients

Refresh Settings | Apps | Itinerary | Patient Station | Add Patient | Ready to Move

Search patients

11/30/2020 | Yesterday | Today | Tomorrow

| Name | MRN | DOB | Gender | Wait Status |
|----------------------------------|----------|----------|--------|-------------|
| Acadia, Willowbcbsip | 10011... | 01/01/69 | M | |
| Adt, Texantwo "Three" | 10011... | 01/01/87 | M | |
| Adttest, Hmw Two | 10015... | 01/26/72 | M | |
| Anesthesia, Attestations | 10017... | 01/31/10 | F | |
| Anesthesia, Blood | 10010... | 04/14/70 | M | |
| Anesthesia, Epidural | 10017... | 04/25/04 | F | |
| Anesthesia, Tee | 10017... | 07/06/78 | M | |
| Appletree, Joyce | 10011... | 01/05/85 | F | |
| Arrival, New | 10017... | 10/23/95 | F | |
| Asap, Procdoc | 10017... | 02/01/94 | F | |
| Asparagus, Anna A | 10010... | 04/21/65 | F | |
| Asparagus, Test A | 10010... | 04/10/55 | F | |
| Caffe, Au Boy C Lait "Vanilla... | 10016... | 04/20/20 | M | |
| Ccat, Hmwcharge | 10015... | 12/28/83 | F | |
| Chgt, Orregtesting | 10015... | 02/13/84 | F | |
| ClinDoc, Ann A | 10012... | 04/20/50 | F | |
| ClinDoc, Tom E | 10012... | 06/02/45 | M | |
| Crld, Obstome | 10015... | 02/21/67 | F | |
| C-Section, Demotwo | 10015... | 08/02/79 | F | |
| Duck, Medicaretest | 10015... | 04/18/44 | M | |
| Ed, West | 10014... | 05/11/82 | F | |
| Emdeontest, Deceased | 10012... | 08/06/70 | F | |
| Endo, Joyce | 10016... | 09/12/87 | F | Admitted |
| Fennel, Rafael | 10010... | 07/18/80 | M | |

Patients: 64 | Data updated at 04:51 PM

Demographics

Adt, Texantwo "Three"
 33 yrs (1/1/1987)
 Male
 MRN: 100119940
 PCP: Interface, Test, MD

Address: 1255 Jones road HOUSTON TX 77030
 Contact Info: 225-777-6666
 MyChart
 Patient Contact: Doemji,Kkkk 225-777-6666

Current Encounter

Admission at 3/1/2017 0800

Status: Admission Confirmed | Service: Internal Medicine | Department / Room: HMW 5NW / 5133

Attending Provider: Sprockel, Peter Timothy, MD | Bed Phone: None | Isolation?: None

Bed: None | Bed Status: None | RTM: None

Transport Status: None | Fin Status: Money Pending, Business Denied

Arrival Status: Admitted at 0649 | Arrival Time: 0648 | Comments: + New

Actions

- Update
- View Only
- Open Chart
- Charge Entry
- Event Mgt
- Print Forms
- Transfer
- Discharge
- Enc Summary
- Auth/Cert
- Benefit Coll
- Estimates
- Patient Tran

Today's Other Encounters

No other encounters for this day.

Schedulable Orders

The patient has more orders, but the maximum number of orders has been loaded.

| Date Placed | Department | Procedure | Priority |
|-------------|------------|-----------------|----------|
| 11/30/2020 | HMW 5NW | PULSE OXIMET... | Routine |
| 11/29/2020 | HMW 5NW | PULSE OXIMET... | Routine |
| 11/28/2020 | HMW 5NW | PULSE OXIMET... | Routine |
| 11/27/2020 | HMW 5NW | PULSE OXIMET... | Routine |
| 11/26/2020 | HMW 5NW | PULSE OXIMET... | Routine |
| 11/25/2020 | HMW 5NW | PULSE OXIMET... | Routine |
| 11/24/2020 | HMW 5NW | PULSE OXIMET... | Routine |
| 11/23/2020 | HMW 5NW | PULSE OXIMET... | Routine |
| 11/22/2020 | HMW 5NW | PULSE OXIMET... | Routine |
| 11/21/2020 | HMW 5NW | PULSE OXIMET... | Routine |
| 11/20/2020 | HMW 5NW | PULSE OXIMET... | Routine |
| 11/19/2020 | HMW 5NW | PULSE OXIMET... | Routine |
| 11/18/2020 | HMW 5NW | PULSE OXIMET... | Routine |
| 11/17/2020 | HMW 5NW | PULSE OXIMET... | Routine |
| 11/16/2020 | HMW 5NW | PULSE OXIMET... | Routine |

3. When you select a patient, important messages, like whether a patient has a confidential encounter or whether a patient is deceased, now appear in yellow.

Patient is Private

Demographics

Solha, Lea Patricia
 3 yrs (7/3/2016)
 Female
 MRN: <172210>
 PCP: Jacob Caldwell

Address: 123 Main Street Baraboo WI
 Contact Info: 555-555-5555
 Patient Contact: Solha, Louise 555-555-5555

Next Encounter

This encounter is confidential

Preadmission

Status: Preadmission Pending | Service: Cardiology | Department / Room: CENTRAL CARDIO

Attending Provider: Sally Silver, MD

Today's Other Encounters

Upcoming Encounters

| Status | Time | Department / Room | Provider |
|-------------------|---------|-------------------|------------------|
| Surgey - Unposted | 9:40 AM | MAIN OR ROOM 1 | Sally Silver, MD |



E-Signatures



Capture Signatures in Refreshed Activity

Key Benefits:

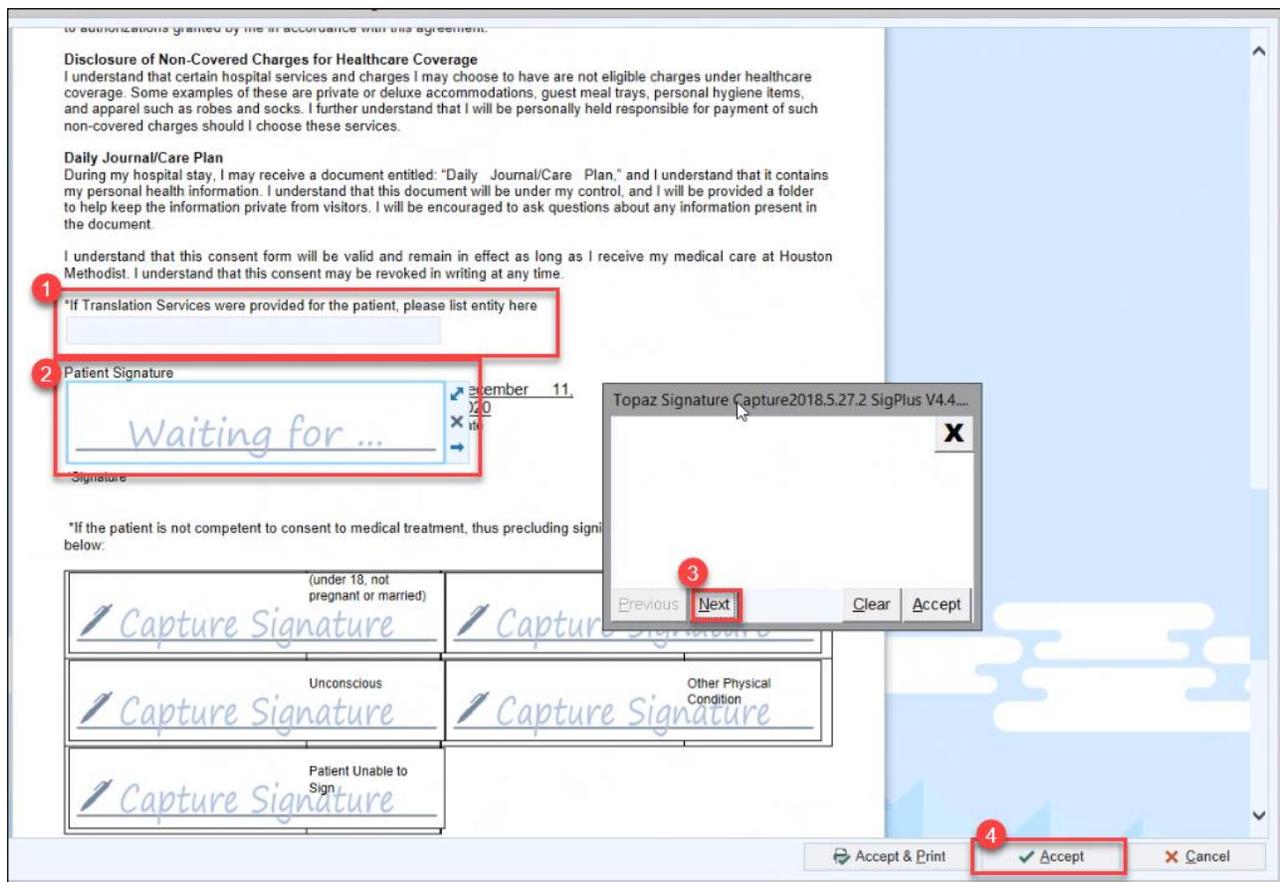
- More efficient

Description:

- Entering signatures gets a new look and additional features, such as setting how you want to enter a signature and moving immediately to the next signature line.

How to:

1. If you use **Translation Services**, complete this field before clicking any other signature boxes. If you don't, the field will automatically grey out.
2. Click the appropriate signature box. The patient signs the e-sig document.
3. The **Topaz Signature Capture** window appears. Click **Next** if other signatures are required.
4. Click **Accept** when finished.



Scheduling



Assign Interpreters to Appointments

Key Benefits:

- Improved workflow

Description:

- You now assign internal and external interpreters to appointments in the same place. No matter which type of interpreter you're assigning to an appointment, start by clicking the **✓ Assign Interpreter** button on the **Interpreter Scheduling** work list toolbar.

| Pref Language | Date | Arrive By | Appt Time | Appt Len | Interp Needed | Interp Status | Dept | App |
|---------------|------------|-----------|-----------|----------|---------------|---------------|--------|-----|
| Spanish | 09/16/2020 | 11:15 AM | 11:15 AM | 15 | In Person | Needs Review | EMC.FM | 123 |

How to:

1. Select the appointment on the **Interpreter Scheduling** work list.
2. Click **✓ Assign Interpreter**.
3. Select **Internal Interpreter**.
4. Select the specific interpreter. Click **View Schedule** and **Hide Schedule** to toggle the view of the interpreter's schedule.
5. Click **✓ Accept**.





New Imaging Orders Now Automatically Link to Existing Outpatient Appointments

Key Benefits:

- More efficient

Description:

- Sometimes an order is created on the fly for an existing office visit, like when a different X-ray view or additional ultrasound is needed for a patient who is already onsite.
- Now, you don't need to manually link new orders to existing appointments in this situation. Instead, Epic evaluates all imaging orders to determine whether they can automatically link to an existing appointment.



Appointments



New Look for Canceling and Rescheduling Appointments

Key Benefits:

- Improved workflow

Description:

- When you cancel or reschedule an appointment, a new **Cancel Appointments** window now opens.
- When you click **Cancel** or **Reschedule**, the window closes automatically, returning you to your workspace. Any other appointments linked to the one you've canceled or rescheduled appear in the **Related Appointments** section on the right, sorted by type.

The **Cancel Appointments** window with a single appointment.

The screenshot shows a window titled "Cancel Appointments" with a close button (X) in the top right corner. The patient information is "Patient: Julie Doncaster". A green bar indicates a selected appointment for "Thursday Feb 11, 2021". Below this, the appointment details are: "NEW PATIENT", "FAM MED SL MOB3 400", "9:15 AM", and "Chen, Rueywen P., MD". There is a "Cancel/Reschedule Reason" text box with a red exclamation mark icon and a magnifying glass icon. Below that is a "Cancel/Reschedule Comment" text box. At the bottom, there are four buttons: "Cancel Appts" (with a red X icon), "Reschedule" (with a calendar icon), "Book It", and "Close".



The **Cancel Appointments** window with a single appointment linked to one or more related appointments.

Cancel Appointments ×

Patient: Betty Goodwin

| |
|--|
| <input checked="" type="checkbox"/> Wednesday Jul 15, 2020 |
| OFFICE VISIT 11:00 AM EMC FAMILY MEDICINE Physician Family Medicine, MD |
| <input checked="" type="checkbox"/> Friday Jul 17, 2020 |
| OFFICE VISIT 2:00 PM EMC FAMILY MEDICINE Physician Family Medicine, MD |

Cancel/Reschedule Reason

Cancel/Reschedule Comment

Related Appointments

Same Day Appointments

| | |
|--|--------------------------|
| <input checked="" type="checkbox"/> XR 30 MINUTE | Fri Jul 17, 2020 1:30 PM |
| EMC X-RAY IMAGING | EMC X-RAY |
| <input checked="" type="checkbox"/> Allow patient to reschedule in MyChart | |

Selected: 3





New Look for EOD Status List

Key Benefits:

- Improved workflow

Description:

- The **EOD Status List**, which allows you to edit the status of past appointments, now groups important information in two distinct sections.
- The section at the top displays basic visit information. For more details, click the arrow at the bottom of the section.
- Below this is the **End of Day Status List** section, where you can edit the appointment's status, as well as the visit type and provider.
- When you set the appointment's status to **Canceled**, the **Cancel Reason** field appears.

End of Day Status List

Patient: Christine Hopkins [203993]

Wed 7/8 at 9:00 AM

OFFICE VISIT 15 Minutes
HUBBARD, CARMEN EMC ALLERGY

End of Day Status List EMC ALLERGY

Status: Canceled Cancel Reason: Patient: Lack of Transportation

Visit Type:

Current Provider: HUBBARD, CARMEN in EMC ALLERGY Change to Provider: Enter a Provider

Accept Cancel





New Look for Confirm Appointments Work List

Key Benefits:

- Improved workflow

Description:

- The **Confirm Appointments** work list has a new look that makes it easier to take action on appointments you need to confirm.

How to:

1. Click the button with the arrows to adjust the row height.
2. Select **Show removed appointments** to see appointments that were removed from the work list.
3. Click **Add Back** to put them back on the work list.
4. When you double-click **Best Number Now**, the **Patient Contact Information** window that appears also has a new look.

The screenshot shows the 'Confirm Appointments' interface. At the top, there is a toolbar with buttons for Refresh, Settings, Layout, Sort, Appt Desk, Registration, Appt Info, Confirm, Add Back, Message, Undo, Cancel, Neg Call, and Dial. Below the toolbar, there are two checkboxes: 'Show appointments currently in unavailable time' and 'Show removed appointments'. A table of appointments is displayed with columns: Ap Co, Date, Arrive By, Appt Time, NS Chance, Patient, Type, Provider/Resoc, Appt Notes, Patient Coverage, Outside Or, Rfl, Pt Comm Pref, Ca, Best Number Now. A 'Patient Contact Information' window is open, showing contact details for a patient with three phone numbers: Home Phone (555-555-0123), Work Phone (555-555-0456), and Mobile (555-555-0123). The window has an 'Add Number' button and 'Accept'/'Cancel' buttons at the bottom.

| Ap Co | Date | Arrive By | Appt Time | NS Chance | Patient | Type | Provider/Resoc | Appt Notes | Patient Coverage | Outside Or | Rfl | Pt Comm Pref | Ca | Best Number Now |
|-------|------------|-----------|-----------|-----------|----------------|--------|----------------|------------|------------------|------------|-----|--------------|----|-----------------|
| | 08/20/2... | 2:00 PM | 2:00 PM | | Perez, Lindsay | Office | FAMILY | back pain | X | ✓ | | MyChart | | 555-555-0123 |
| | 08/20/2... | 2:15 PM | 2:15 PM | | Maxwell, Ed | Office | FAMILY | cough | X | ✓ | | MyChart | | 555-555-0110 |
| | 08/20/2... | 2:30 PM | 2:30 PM | | Stokes, Scott | Office | FAMILY | anxiety | X | ✓ | | MyChart | | 555-555-0175 |
| | 08/20/2... | 2:45 PM | 2:45 PM | | Brown, Ernest | Office | FAMILY | knee pain | X | N/A | | MyChart | | 555-555-0121 |





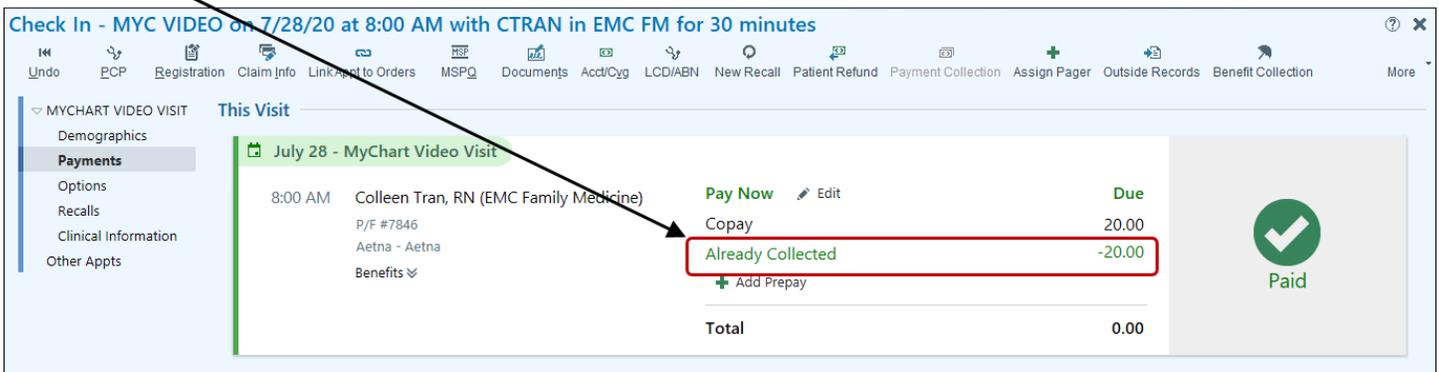
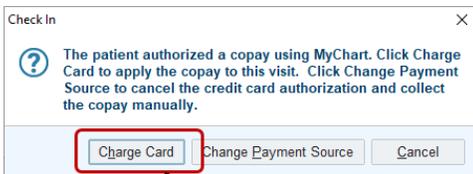
Copays for Video Visits and E-Visits Are Now Charged During Check-In

Key Benefits:

- Financial benefit

Description:

- These changes help ensure that copays are collected for video visits and appointments arrived by clinicians. When the system attempts to charge a patient's copay for video visits in **MyChart**, the attempt is now made during **check-in**, rather than when the encounter is closed.
- When a patient preauthorizes a payment method during **eCheck-in**, the system attempts to charge that payment method during check-in. If the patient doesn't preauthorize a payment method during **eCheck-in**, the system doesn't attempt to collect a copay.
 - Note that if copay collection fails, such as because the copay for a video visit is higher than the amount authorized by the patient during **eCheck-in**, the visit can be arrived and completed successfully.
- Keep in mind that with this change, because the system attempts to charge the patient's copay before a video visit, if there's a connection issue that drops the visit, the patient may be due a refund.



Cash Drawer Updates



Quickly View Cash Drawer Summary and Receipts

Key Benefits:

- Fewer clicks

Description:

- The new **Cash Drawer** helps you find information quickly and with fewer clicks. The **Summary** section shows all key information for the drawer, including problematic sources.
- Receipts are now directly linked in the **Payments** grid.

Cash Drawer:

Enter Cash Counted cash: 100.00

| Bills/Coins | Quantity | Total |
|-------------|----------|--------|
| 20.00 | 5 | 100.00 |
| 10.00 | 0 | 0.00 |
| 5.00 | 0 | 0.00 |
| 1.00 | 0 | 0.00 |
| 0.25 | 0 | 0.00 |
| 0.10 | 0 | 0.00 |
| 0.05 | 0 | 0.00 |
| 0.01 | 0 | 0.00 |

Beginning balance: 20.00 Net cash: 80.00

Enter Other Sources

| Source | Amount |
|--------|--------|
| | |

Summary

80.00
Drawer Amount

665.00
Selected Payments

-585.00
Difference

| Source | Drawer Amount | Payments | Difference |
|--------|---------------|----------|------------|
| Cash | 80.00 | 430.00 | -350.00 |
| Check | 0.00 | 235.00 | -235.00 |

Enter Closing Information Print closing report

Envelope #: Envelope amount: 80.00

Collector:

Discrepancy reason:

Comment:

Match Drawer Contents to Posted Payments

Select All | Unselect All

| Source | Amount | Reference # | Guarantor ID | Patient | Date | Receipt | Type | |
|-------------------------------------|--------|-------------|--------------|---------------|--------------|------------|------|--|
| <input checked="" type="checkbox"/> | Cash | 80.00 | 102 | 24787 | MARIE,RYAN | 06/14/2005 | 1228 | |
| <input checked="" type="checkbox"/> | Check | 200.00 | 37363 | 24920 | KRAUSE,KRIS | 06/14/2005 | 1229 | |
| <input checked="" type="checkbox"/> | Cash | 350.00 | 903 | ACKER,BRANDON | 06/15/2005 | 1236 | | |
| <input checked="" type="checkbox"/> | Check | 35.00 | 32987 | 916 | DOUGLAS,RYAN | 06/15/2005 | 1237 | |





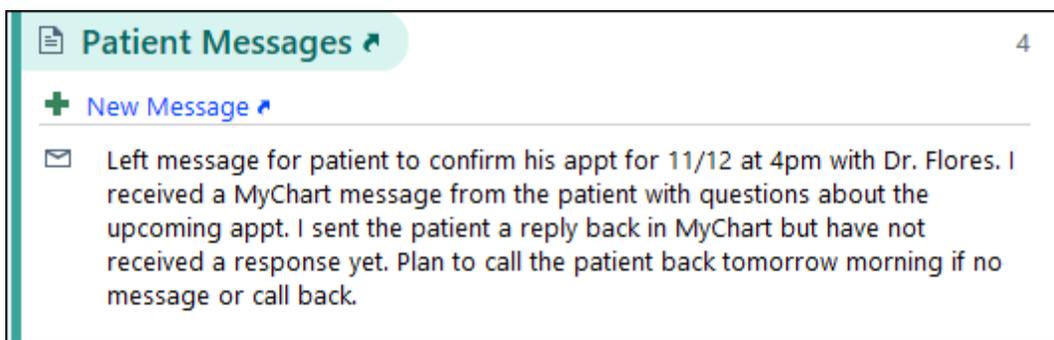
Read More of Patient's Message from Sidebar

Key Benefits:

- More efficient

Description:

- The **Patient Sidebar** now show more of a patient's message, so you don't have to open **Patient Messages** to read the full message as often.





Simplified Window for Printing Labels

Key Benefits:

- Improved workflow

Description:

- The **Print Labels** window accessible from the **Appointment Desk** toolbar has a new look that puts all the fields you need to fill out in one place.
- This includes the option for specifying the **Encounter** for labels that need it, which now appears in this window instead of as a separate prompt.

The screenshot shows the 'Print Labels' dialog box. At the top left is a 'Print' button with a printer icon. To its right is a 'Number of Copies' field set to '1' with '+' and '-' buttons. Below this is the 'Printer' section, where 'ADT ZEBRA HC100' is selected. A 'Paper Source' field is empty, and a checkbox 'Remember this printer and tray selection' is checked. The 'Settings' section includes a 'Label Format' dropdown set to 'PNQ Label With Contact', an 'Encounter' field with a red error icon, 'Print on both Sides?' set to 'Use Printer Default', and 'Collate?' set to 'Yes'. A 'Cancel' button is at the bottom. On the right, a list of printers is shown, including 'ADT ZEBRA HC100', 'PDF CREATOR (MASTER)', and several local and network printers.



Department Appointments Report



New Look for Department Appointments Report Settings

Key Benefits:

- Improved workflow

Description:

- The **Department Appointments** report is updated with a more streamlined look. The reorganized **Date/Time Range** has options to make it easier to work with reports for the current day:
 - A new **Today** option is available and selected by default.
 - The **Use time window** checkbox is now a button labeled **Relative to Current Time**. The related fields for setting the begin and end time now appear only when the button is selected.

The screenshot shows the 'Criteria' tab of the Department Appointments Report settings. The 'Date/Time Range' section is highlighted with a red box and contains three buttons: 'Today', 'Date Range', and 'Relative To Current Time'. The 'Today' button is selected. Other sections include 'Appointment Locations' with buttons for 'Department', 'Center', and 'Subgroup'; 'Appointment Status' with 'All' and 'List' buttons; and 'Visit Type' with 'All' and 'List' buttons. At the bottom, there are buttons for 'Run', 'Save', 'Save As', 'Delete', 'Restore', 'Print', and 'Cancel'.

This screenshot shows the 'Date/Time Range' section expanded. The 'Relative To Current Time' button is selected and highlighted with a red box. Below this button, there are input fields for 'Begin' and 'End' times, each with a 'Min' button and a red exclamation mark icon. Below the input fields are 'Before' and 'After' buttons for both 'Begin' and 'End'. The rest of the settings window is visible in the background, including the 'Appointment Locations' and 'Appointment Status' sections.



Provider Templates: Template Builders (Restricted Access)



Set Provider Session Limits More Easily

Key Benefits:

- Improved workflow

Description:

- The **Session Limits** activity (formerly **Edit Visit Type Limits**) has a new look that prioritizes the information you use most often when setting session limits for a provider's schedule.
- Each session now appears as an individual card, and daily, weekly and monthly sessions appear in different colors for easy categorization.
- You can change the department from a field on the left side of the activity beneath the provider's name, making it easier to configure multiple sets of session limits for a provider who is active in more than one department.

Session Limits: MARINO, ROB [TRN146]

Display Edit Template Delete Template Defaults Exceptions Messages Copy Reassign Template Calendar

MARINO, ROB

EMC FAMILY MEDICINE [10501101]

Using Department-level Session Limits

Daily

- + DAILY
- + AM
- + PM

Weekly

- + WEEKLY

Monthly

- + MONTHLY

MONTHLY - WELL CHILD Monthly

Limit Type
 Visit Type Visit Type Grouper Overbook WELL CHILD

Maximum # of Months to Recur
 1 1 1 2 3 4 5 6 7 Date Range 8/25/2020 - Indefinite

WEEKLY - NEW PATIENT Weekly

Limit Type
 Visit Type Visit Type Grouper Overbook NEW PATIENT

Maximum # of Weeks to Recur
 1 1 1 2 3 4 5 6 7 Date Range 8/25/2020 - Indefinite

DAILY - Complex Daily

Limit Type
 Visit Type Visit Type Grouper Overbook Complex

Maximum Applicable Days of the Week
 5 Sun Mon Tue Wed Thu Fri Sat 7/30/2020 - Indefinite

DAILY - Overbook Daily

Limit Type
 Visit Type Visit Type Grouper Overbook

Maximum Applicable Days of the Week
 5 Sun Mon Tue Wed Thu Fri Sat 7/30/2020 - Indefinite

File File & Close Cancel





New Look for Template Exceptions Report

Key Benefits:

- Improved workflow

Description:

- Changes to buttons on the **Template Exceptions** report toolbar make it easier to sort the report, edit exceptions and delete recurring exceptions.

How To:

1. Define custom sorting options based on up to three columns by clicking the new **Sort** button.
2. Quickly edit an exception in the **Edit Exceptions** window by clicking the **Edit** button (previously labeled **Exceptions** and moved next to the **Add** button). You can also double-click a row to open the **Edit Exceptions** window. Previously, you needed to click the **Exceptions** button to open **Template Exceptions** and click **Edit** to open **Edit Exceptions**.
3. Delete all instances of a recurring exception by clicking the new **Delete Recurring** button. The **Delete** button is now labeled **Delete Selected** to distinguish it from **Delete Recurring**.

Template Exceptions Report: 6-MONTH TEMPLATE EXCEPTIONS REPORT

Refresh Settings Layout **Sort** **Add** **Edit** Convert Delete Selected **Delete Recurring** Edit Template Provider Message

| Type | Date | Day | From Time | To Time | Department | Provider/Resource |
|-----------------|------------|----------|-----------|---------|---------------------|-----------------------|
| Day unavailable | 09/07/2020 | Monday | | | EMC FAMILY MEDICINE | MYCHART DT, PHYSICIAN |
| Day unavailable | 11/26/2020 | Thursday | | | EMC FAMILY MEDICINE | MYCHART DT, PHYSICIAN |
| Day unavailable | 11/27/2020 | Friday | | | EMC FAMILY MEDICINE | MYCHART DT, PHYSICIAN |



Scheduling – Registration – Template Builders Feb. 21 Epic Update Companion

Report Settings - 6-MONTH TEMPLATE EXCEPTIONS REPORT [3914]

Criteria | Display | Appearance | Print Layout | General

Search available reports

Available Reports

- (New)
- 2-WEEK TEMPLATE EXCEP
- 6-MONTH TEMPLATE EXCE

Date/Time Range

From Date: T To Date: M+6

From Time: To Time:

Days: Sun Mon Tue Wed Thu Fri Sat

Days since last modified: Use Date Range

Location

Department Center Subgroup

Login List

Provider/Resource

Provider and Resource All List

Exception

Unavailable Time Unavailable Day

Unavailable Reason

All List

Held Time Held Day

Hold Reason

All List

User: FILLION, DOREEN R

My default

Run Save Save As Delete Restore Print Cancel





Search for Provider Schedule Actions Directly in Template Audit Trail Report

Key Benefits:

- Improved workflow

Description:

- It's now easier to search for actions taken on a provider's schedule in just one report screen, the **Template Audit Trail** report.
- You can enter your search criteria and view results on the same screen. You can also change your search criteria without leaving the report.

How to:

1. The search criteria appear on the left.
2. The search results appear in the middle.
3. The detail report is on the right.

The screenshot displays the 'Template Audit Trail' interface. On the left (1), there is a search panel for provider 'PRICE, GRACE' at 'EMC FAMILY MEDICINE'. The middle section (2) is a table of actions:

| Edited Date & Time | User | Action | From Date | To Date | Day of Week | Details |
|---------------------|----------------|--------------------------|------------|------------|-------------|-------------------|
| 08/01/2020 01:00 AM | CADENCE, EO... | Reset Release Date | | | | Set to 6/31/2021 |
| 07/30/2020 01:00 AM | CADENCE, EO... | Set Holidays Unavailable | 12/31/2021 | 12/31/2021 | Friday | |
| 07/30/2020 01:00 AM | CADENCE, EO... | Set Holidays Unavailable | 05/30/2022 | 05/30/2022 | Monday | |
| 07/30/2020 01:00 AM | CADENCE, EO... | Set Holidays Unavailable | 07/04/2022 | 07/04/2022 | Monday | |
| 07/01/2020 01:00 AM | CADENCE, EO... | Reset Release Date | | | | Set to 7/31/2021 |
| 06/01/2020 01:00 AM | CADENCE, EO... | Reset Release Date | | | | Set to 6/30/2021 |
| 05/01/2020 01:00 AM | CADENCE, EO... | Reset Release Date | | | | Set to 5/31/2021 |
| 04/01/2020 01:00 AM | CADENCE, EO... | Reset Release Date | | | | Set to 4/30/2021 |
| 03/01/2020 01:00 AM | CADENCE, EO... | Reset Release Date | | | | Set to 3/31/2021 |
| 02/01/2020 01:00 AM | CADENCE, EO... | Reset Release Date | | | | Set to 2/28/2021 |
| 01/01/2020 01:00 AM | CADENCE, EO... | Reset Release Date | | | | Set to 1/31/2021 |
| 01/01/2020 01:00 AM | CADENCE, EO... | Set Holidays Unavailable | 11/25/2021 | 11/25/2021 | Thursday | |
| 01/01/2020 01:00 AM | CADENCE, EO... | Set Holidays Unavailable | 12/24/2021 | 12/24/2021 | Friday | |
| 01/01/2020 01:00 AM | CADENCE, EO... | Set Holidays Unavailable | 11/26/2021 | 11/26/2021 | Friday | |
| 12/01/2019 01:00 AM | CADENCE, EO... | Reset Release Date | | | | Set to 12/31/2020 |
| 11/15/2019 10:27 AM | EPIC, USER | Set Holidays Unavailable | 11/27/2020 | 11/27/2020 | Friday | |
| 11/15/2019 10:27 AM | EPIC, USER | Set Holidays Unavailable | 11/29/2019 | 11/29/2019 | Friday | |
| 11/15/2019 10:37 AM | EPIC, USER | Set Holidays Unavailable | 11/26/2019 | 11/26/2019 | Friday | |

The right section (3) shows a 'Reset Release Date' detail report with columns for 'Previous Release Date' (07/31/2021) and 'New Release Date' (08/31/2021).



Advanced Beneficiary Notice



Dually Eligible Beneficiaries ABN Forms Appear Automatically

Key Benefits:

- CMS regulations
- Time saver
- More efficient

Description:

- The **Dually Eligible Beneficiaries ABN** form now appears automatically for appropriate patients. You no longer need to 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: Comments:

Notice status: Time updated:

Communication barriers: Date updated:

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 | |





You Can No Longer Mark ABNs As Void

Key Benefits:

- More efficient
- Time saver

Description:

- **ABN Void (Order Canceled or Changed, ABN No Longer Applies)** option no longer appears in the list of ABN statuses you can select. The system automatically voids ABNs that aren't needed due to a change in order or diagnosis.

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) This condition |
|---------------------------------------|--------------------|
| (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 | Addition |
|-----------------------------|----------|
| 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.



Eligibility



Automatically Pull Patient's Coverage Info

Key Benefits:

- More efficient
- Time saver

Description:

- When creating coverage from a **Real Time Eligibility (RTE)** response where the patient's relationship to subscriber is self, the system now automatically populates the patient's demographic information. Previously, you had to click **Pull Info** to populate this information.

Subscriber Info
✕

Pull Info

Subscriber Demographics

| | |
|--|---|
| Name: <input type="text" value="WEBB,BILL"/> | Associated patient: <input type="text" value="WEBB,BILL"/> Select |
| Address link?: <input type="text" value="Yes"/> | Medicare #: <input type="text" value="xxxxxxxCC11"/> |
| Address: <input style="border: 2px solid blue;" type="text" value="1979 Milky Way"/> | Rel to guarantor: <input type="text" value="Self"/> 🔍 |
| City (or ZIP): <input type="text" value="LA VISTA"/> | SSN & type: <input type="text" value="xxx-xx-3223"/> 📅 |
| State: <input type="text" value="NE"/> 🔍 ZIP: <input type="text" value="68128"/> 📅 | Sex: <input type="text" value="M"/> 🔍 Birth date: <input type="text" value="5/8/1950"/> 📅 |
| County: <input type="text" value="SARPY"/> 🔍 | Home phone: <input type="text" value="402-222-2332"/> 📅 |
| Country: <input type="text" value="United States of America"/> 🔍 | Work phone: <input type="text"/> 📅 |
| | Fax: <input type="text"/> 📅 |

Subscriber Employment

| | |
|--|--|
| Employer: <input type="text" value="ASHLEY FURNITURE"/> 🔍 | Employment status: <input type="text" value="Retired"/> 🔍 |
| Address: <input type="text" value="Lien Road"/> | Employment date: <input type="text"/> 📅 |
| City (or ZIP): <input type="text" value="MADISON"/> | Employee ID: <input type="text"/> |
| State: <input type="text" value="WI"/> 🔍 ZIP: <input type="text"/> | Occupation: <input type="text"/> |
| County: <input type="text"/> 🔍 Country: <input type="text" value="USA"/> 🔍 | Phone: <input type="text"/> 📅 |
| | Fax: <input type="text"/> 📅 |



Referrals



Manage Referral Assignments with Refreshed Look

Key Benefits:

- Time saver
- Fewer clicks

Description:

- The **Referral Action List** has a new look with all of the same options you are used to. It also features fewer pop-up windows as you complete workflows, meaning fewer clicks.
- Referrals staff can now assign referrals and auth/certs to one or more appointments from a centralized and modernized **Referral Action List**.

The **Referral Action List** as it appears when opened from **Appointment Desk**.

Referrals for King, Melville

Refresh | Flip | New | Edit | Copy Referral | Message | Void | Referral Counts | Sched St | Show All

Patient Demographics for KING, MELVILLE [100221]

| | | | |
|-------------|-------------------------------------|-------------|----------------------------------|
| Birth date: | 2/13/1991 | SSN: | xxx-xx-8235 |
| Age: | 29 yrs | Sex: | Male |
| Home phone: | | Work phone: | 608-222-2222 |
| Address: | 123 Cake Street Madison WI 53719 | E-mail: | No email: Choose not to disclose |

Permanent comments:

Referral Information [1000026670]

| | | | |
|-----------------------|-------------------------|-------------------------|---------------------------------|
| Patient: | KING, MELVILLE [100221] | MRN: | 100221 |
| Status: | Pending Review | Type: | Consultation |
| Class: | Internal | Reasons: | Specialty Services Required [5] |
| Diagnosis: | | Procedures: | DIET3 - DIET 100 GRAM FAT |
| Start: | Jul 21, 2020 | Expiration: | Sep 21, 2020 |
| Requested: | 1 | Authorized: | 1 |
| Scheduled: | | Completed: | |
| Authorization #: | | Precertification #: | |
| Referring Location: | COPPINS HOSPITAL | Referred to Location: | |
| Referring Department: | PRIMARY OP DEP | Referred To Department: | |
| Referring Provider: | KOPANON, WILLIAM | Referred To Provider: | |

Possibly Related Referrals

| Referral # | Status | Status Reason | Scheduling Status | Referred To | Services |
|------------|----------------|---------------------------|-----------------------|-------------|---------------------------------|
| 1000026669 | Pending Review | System Automatically Pend | Ready to be scheduled | Radiology | 71010 (CPT®) - CHEST X-RAY 1 VW |

| Referral ID | Assig | Msg | Referred By | Referred To | Sched Status | Sched By | Status | Req/Auth | Vis | Sched/Comp | Starts | Expires |
|-------------|-------|-----|-------------------|-------------|----------------------|----------|----------------|----------|-------|------------|------------|---------|
| 1000026670 | | | KOPANON, WILLI... | – | Ready to be sched... | 8/21/20 | Pending Review | 1 / 1 | 0 / 0 | 07/21/2020 | 09/21/2020 | |
| 1000026669 | | | KOPANON, WILLI... | Radiology | Ready to be sched... | 8/21/20 | Pending Review | 1 / 1 | 0 / 0 | 07/21/2020 | 09/21/2020 | |





Referral/Authorization Workqueues Now Show Status Reason, Scheduling Status and More

Key Benefits:

- Time saver

Description:

- View more information from a single spot. Now, the details report in referral/authorization workqueues once again shows more information:
 - Scheduling Status
 - Status Reason
 - Miscellaneous Flags
 - Reason for Referral
 - Condition Group
 - Right to Healthcare
 - Result of Initial Assessment

REIS,GEORGE MRN: <116974>
Referral/Authorization: 1000041775

Auth #: Precert #: Auth Status: Pending Review Reason: Duplicate

| Workqueue Information | | Workqueue Notes | |
|------------------------------------|---|-------------------------------|--------------------|
| (1) | Error Message There is an appointment scheduled but the attached referral is not yet authorized. | (0) | None |
| General Information | | | |
| Authorized From | First Appointment By | Expires | Type |
| 10/1/2020 | | 12/1/2020 | Radiology Services |
| | | | Class |
| | | | Internal |
| | | | Priority |
| | | | Routine |
| | | | Status |
| | | | Pending Review |
| | | | Pend Reason |
| | | | Duplicate |
| | | | Scheduling Status |
| | | | In progress |
| Flags | | Reasons | |
| | | • Specialty Services Required | |
| Procedures | | Diagnoses | |
| Description | Rev. Code | Mod. | Provider |
| 73510 (CPT®) - X-RAY HIP UNI 2+ VW | | | |
| | | | Appr/Req |
| | | | 1 / 1 |
| | | | (1) |
| | | | (0) |
| | | | None |





Use Previous Referral Productivity Report Settings in Report Workbench

Key Benefits:

- More efficient

Description

- If you had saved reports that you used to review **Referrals User Productivity** (like reports that filter by staff you oversee or specific actions), you can now access those settings in the **Reporting Workbench** version of the report.

Referral Audit History [665864] as of Tue 2/11/2020 11:55 AM

Filters Options Edit Referral

Select All

| Referral ID | Patient Name | Date and Time | User | Action | New Value | Status |
|-------------|----------------|--------------------|-------------|---------------|-------------|----------------|
| 69105 | Perkins, Gina | 2/10/2020 6:56 AM | SEARS, MARK | Change Status | New Request | Pending Review |
| 69107 | Manela, Violet | 2/10/2020 8:06 AM | SEARS, MARK | Change Status | New Request | Pending Review |
| 69110 | Green, Natalie | 2/10/2020 8:48 AM | SEARS, MARK | Change Status | New Request | Pending Review |
| 69112 | Green, Natalie | 2/10/2020 9:06 AM | SEARS, MARK | Change Status | New Request | Pending Review |
| 69114 | Case, Thomas | 2/10/2020 9:22 AM | SEARS, MARK | Change Status | New Request | Pending Review |
| 69115 | Davis, Laurel | 2/10/2020 9:27 AM | SEARS, MARK | Change Status | New Request | Pending Review |
| 69120 | Olson, Mark | 2/10/2020 10:09 AM | SEARS, MARK | Change Status | New Request | Pending Review |
| 69141 | Lee, Tom | 2/10/2020 10:27 AM | SEARS, MARK | Change Status | New Request | Pending Review |
| 69142 | Glenn, Sarah | 2/10/2020 10:31 AM | SEARS, MARK | Change Status | New Request | Pending Review |
| 69144 | Law, Andy | 2/10/2020 10:39 AM | SEARS, MARK | Change Status | New Request | Pending Review |
| 69145 | Law, Andy | 2/10/2020 10:45 AM | SEARS, MARK | Change Status | New Request | Pending Review |
| 69147 | Law, Andy | 2/10/2020 10:49 AM | SEARS, MARK | Change Status | New Request | Pending Review |
| 69150 | Brown, Sarah | 2/10/2020 10:58 AM | SEARS, MARK | Change Status | New Request | Pending Review |
| 69168 | Carter, Cody | 2/10/2020 12:41 PM | SEARS, MARK | Change Status | New Request | Pending Review |
| 69170 | Carter, Cody | 2/10/2020 12:43 PM | SEARS, MARK | Change Status | New Request | Pending Review |
| 69173 | Wallace, Suzy | 2/10/2020 12:58 PM | SEARS, MARK | Change Status | New Request | Pending Review |
| 69175 | Todd, Mary | 2/10/2020 1:06 PM | SEARS, MARK | Change Status | New Request | Pending Review |
| 69178 | Adams, Helen | 2/10/2020 1:07 PM | SEARS, MARK | Change Status | New Request | Pending Review |





Send Referral Messages in Refreshed Workflow

Key Benefits:

- More efficient
- Time saver

Description:

- The workflow for sending a referral message is redesigned. It keeps all previous features and also allows you to set due dates and reminders.

The screenshot displays the 'Referral Message' interface in Epic. The message is addressed to 'P NURSE TRIAGE POOL' and contains the text: 'Appointment for Referral 72491' and 'Can you make sure to triage referral 72491 as quickly as possible? Its authorization will soon expire but we should still have time to schedule an appointment if we act now.' The interface includes a 'Dates' panel (highlighted in red) with fields for 'Delay sending until', 'Due on', and 'Expire on'. The 'Expire on' field is set to 8/3/2020 at 3:55 PM. Below the 'Dates' panel is a 'Notifications' section with a 'Notify me if not' table showing 'Done By', 'Read By', and 'Replied By' for 5/8/2020. The 'Referral #72491' details are shown, including authorization dates (2/21/2020 - 5/21/2020), patient information (James Kubiak, Male, 37 yo, 8/26/1982, MRN: <119708>), and referral details (Referred By: Chandler Choi, MD; Referred To: WI HARBOR BLUFF HOSPITALS). The interface also shows 'Reasons' (Specialty Services Required, Class: Internal, Type: Radiology Services) and a 'Show More' link. At the bottom, there are 'Send' and 'Cancel' buttons.





Specify Authorization Requests as Preservice, Concurrent or Retro

Key Benefits:

- More efficient

Description:

- Choose from three categories to specify when an authorization request or referral is initially requested:
 - **Preservice.** A patient has a planned procedure or admission and their authorization request is made beforehand.
 - **Concurrent.** The authorization request is made while services tracked in bed days are ongoing, such as during an unplanned admission.
 - **Retro.** The authorization request is made after the patient's services have been performed.

General

Authorization

Dx/Px

Bed Days

Linked Records

Grouped Referrals

Notes

Notifications

Authorization

Coverages for MARTIN,RAPHAÉL (as of 10/15/2020)

| U | F | St | Payor | Plan | Mem/Ins ID | Verif Status | Eff Date | Term Date | Auth # | Precert # | Au... |
|-------------------------------------|---|----|-----------|----------|------------|--------------|----------|-----------|--------|-----------|-------|
| <input checked="" type="checkbox"/> | | Y | BLP PAYOR | BLP PLAN | | New | | | | | |

F: Carrier authorization required U: Use coverage

Authorized Dates

Start date:

Expiration date:

IBNR pay until date:

Referred on date:

Suppress expiration review

Initial request type:



SmartPhrase



Add SmartPhrases to Notes Using SmartLists

Key Benefits:

- Personalizing your workflow

Description:

- To speed up your documentation, you can now use **SmartLists** to add **SmartPhrases** to your notes and other documentation in SmartTool-enabled text boxes in Epic and Canto.

How to:

1. Go to the **SmartList Editor** (search: SmartList) and create a **SmartList**. Select the **User** option.
2. If you know the dot phrase for the **SmartPhrase** you want to add, type it in the editor.
3. If you need to look up the **SmartPhrase**:
 - a. Click the **star icon** in the **Choice** field to open the **SmartTool Options** menu.
 - b. Click **List Phrases**.
 - c. Find and add the **SmartPhrase** you want to include by clicking **Add to Text**.
4. To select a **SmartPhrase** from a **SmartList** in a document:
 - a. Insert the **SmartList** in a SmartTool-enabled text box, or press F2 to jump to the **SmartList** if it already appears.
 - b. Select the **SmartPhrase** from the **SmartList**. Right-click the **SmartList** to save your selection and move to the next wildcard or **SmartList**.

User SmartList – sgnMyProc [12833]

| Choice | Default? |
|-------------------|--------------------------|
| {:PHR,ENDOSCOPY} | |
| {:PHR,COLONSCOPY} | |
| .erc | <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. |



MyChart



MyChart's New Home Page

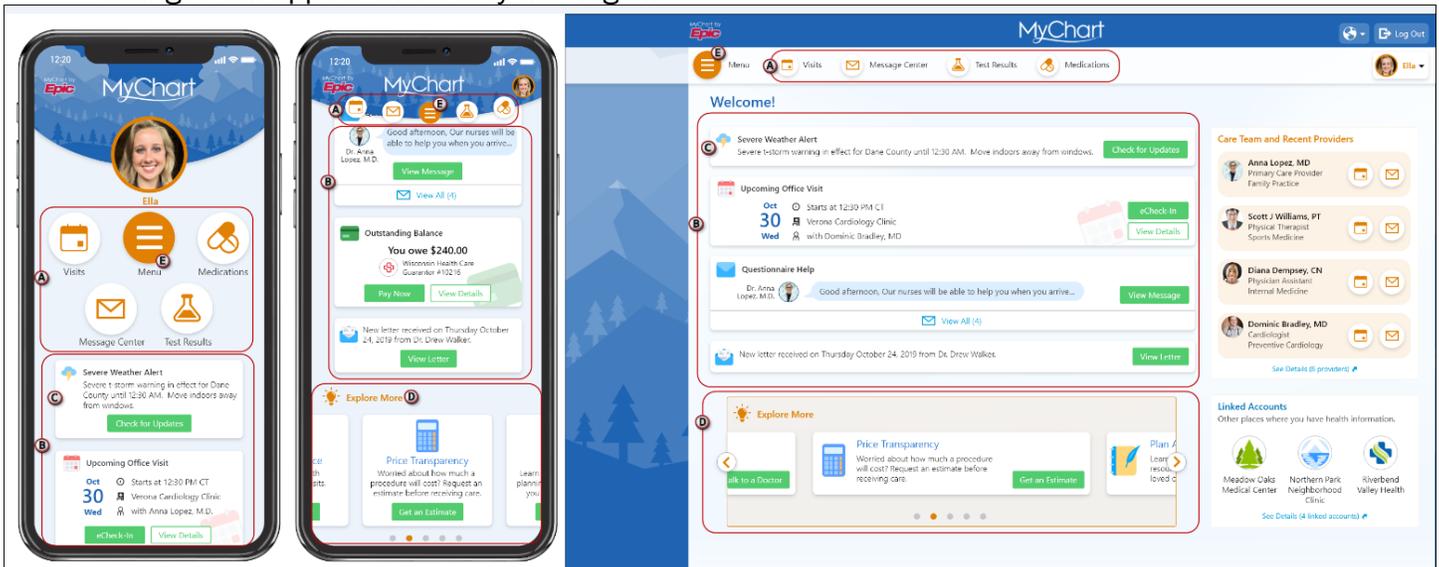
Key Benefits:

- Improved workflow
- More efficient

YouTube View the [New MyChart Experience](#) video.

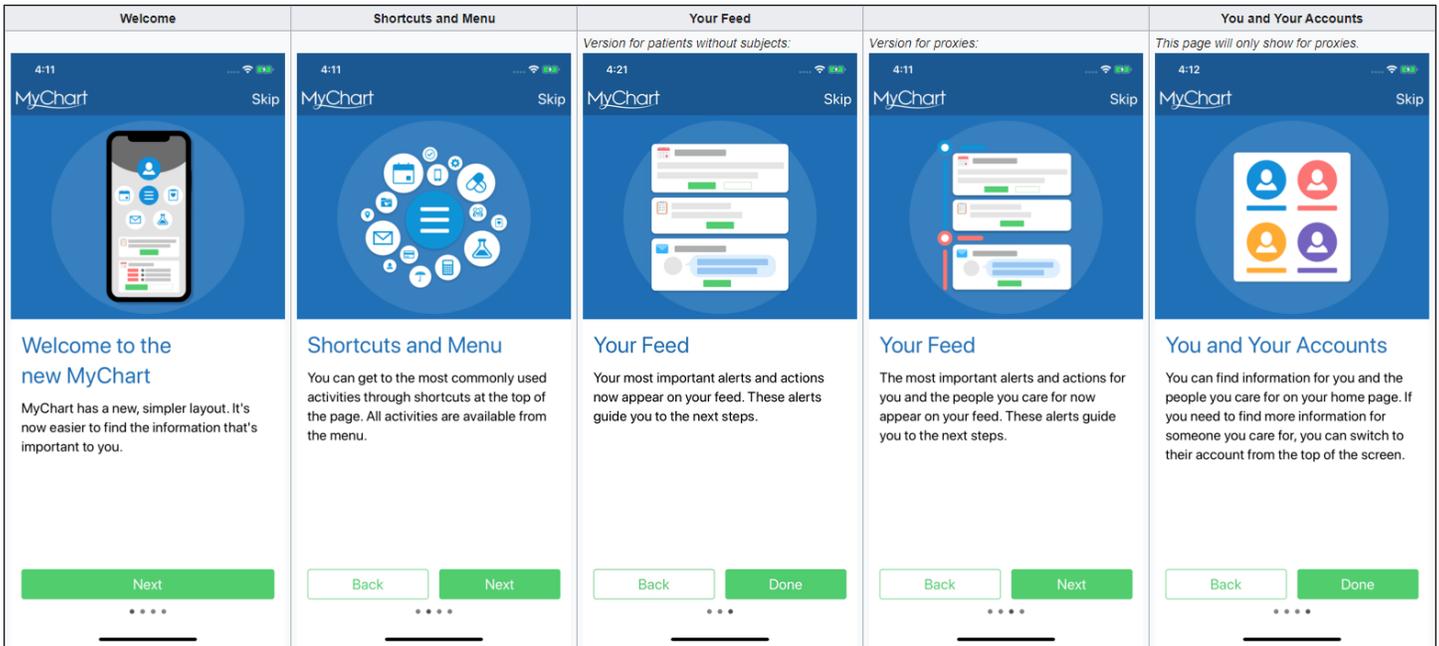
Description:

- The **MyChart** homepage and user experience is being redesigned to make it cleaner and easier to use. All features and functionality are available on both the web and mobile app platform. The new design provides shortcuts to common activities and an actionable list of updates the patient logs in.
- Patients must update the mobile app to version 9.3 or higher to view the changes. An overview of changes will appear when they first log in.



- Shortcuts** on the homepage provide easy access to the four activities a patient uses the most.
- The **health feed** is a consolidated view of actionable health updates, including appointment reminders, check-in tasks and messages from the patient's care team.
- Information for proxies and the patients they have proxy access for appears in the same feed, color-coded by person. Proxies can select a patient from the proxy menu to go to that patient's full chart.
- The **Explore More** section highlights specific functionality and directs patients to features in **MyChart**.
- The unified menu provides patients with access to every available activity, in addition to what's accessible through **Shortcuts** or the **health feed**, and patients can search for menu items by name.
- Onboarding screens orient patients and proxies to the new **MyChart** experience as well.

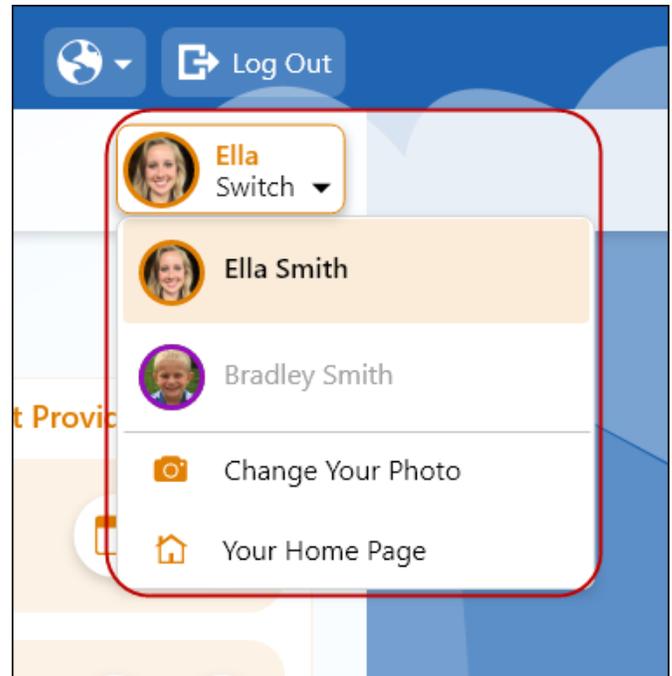




Users with and without proxy access can also change their photo or easily jump to their own home page from this same menu on the **MyChart** website.

The photo option here is in addition to the workflow users already have for changing their photo on the **Personalize** page.

If a patient does not have proxy access, the menu simply shows the patient's name. On the **MyChart** mobile app, patients can update colors, photos, and nicknames from the **Account Settings** activity, which is now available from the mobile switch menu.





MyChart's New Home Page

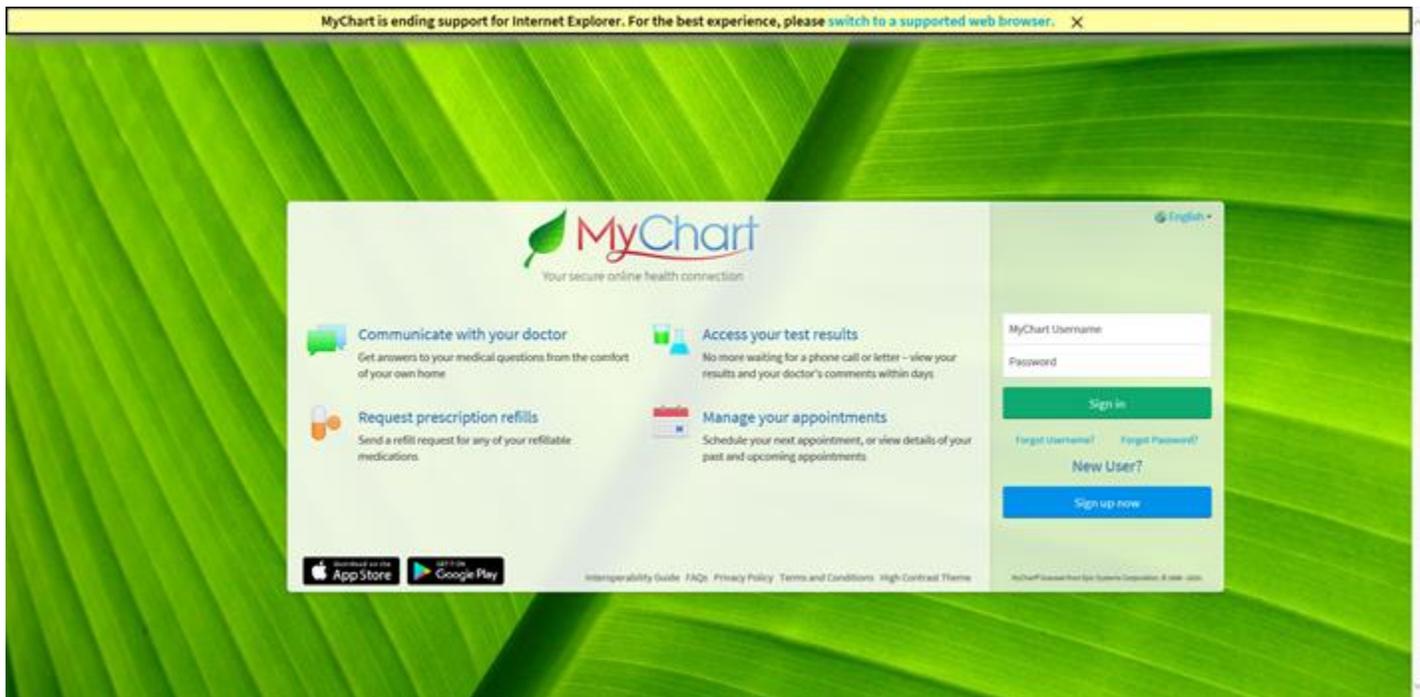
Key Benefits:

- More accuracy and reliability

Description:

- To provide a consistent, modern and accessible experience to, Internet Explorer 11 (IE 11) will no longer be supported. **MyChart** users' experience in accessibility, performance and responsiveness has improved because we are moving to the latest web standards.
- By default, patients are redirected to an error page and instructed to download an alternative web browser when they navigate to the **MyChart** site from the IE 11 web browser.
- In-clinic features launched from Epic (such as questionnaires and **MyChart** sign-up) continue to work with IE 11, as does **Share Everywhere**.





Storyboard



Hover to Discover New Demographics Information

Key Benefits:

- Fewer clicks

Description:

- You now have easy access to more demographic information when you hover over a patient's name at the top of **Storyboard** in a clinical and HIM (1) or patient access (2) context.
- Look for these new items, if they're documented for the patient:
 - Patient Contact
 - Time of Birth, until a baby is one month old
 - Written and Spoken Language (clinical and HIM only)
 - Unit (clinical and HIM only)
 - Race and Ethnicity (clinical and HIM only)

| | |
|---|---|
| <p>Nusaybah Odeh (Legal) 1</p> <p>Pronouns: she/her/hers</p> <p> 26 yo, 2/17/1994 Gender identity: Female Legal sex: Female Sex assigned at birth: Female Marital status: Significant Other Ethnicity: African American</p> <p> Preferred language: English</p> <p> Employer: Betty's Pastry Shop Occupation: Baker</p> <p> MRN: <383666></p> <p> Patient Contacts Odeh, Alana (Mother) 608-555-1234 (Mobile)</p> <p> Unit: WI PRAIRIE BLUFF ED Bed: WI PB CRITICAL CARE 2 / PB CRITICAL CARE 2</p> <p> 1979 Milky Way Drive Verona WI 53593</p> <p> 608-555-1979 (Home Phone) ★ 608-555-9791 (Work Phone)</p> | <p>Nusaybah Odeh (Legal) 2</p> <p>Pronouns: she/her/hers</p> <p> 26 yo, 2/17/1994 Gender identity: Female Legal sex: Female Marital status: Significant Other</p> <p> Employer: Betty's Pastry Shop Occupation: Baker</p> <p> SSN: xxx-xx-3521 MRN: <383666> CSN: 10002147367</p> <p> Patient Contacts Odeh, Alana (Mother) 608-555-1234 (Mobile)</p> <p> 1979 Milky Way Drive Verona WI 53593</p> <p> 608-555-1979 (Home Phone) ★ 608-555-9791 (Work Phone)</p> |
|---|---|





Hover Over Cooler Icon to View Transplant Episode List

Key Benefits:

- Easily accessible

Description:

- You do not have to click the cooler icon to see a list of your patient's transplant episodes anymore. Just hover to see the list.

How to:

1. Hover over the cooler icon to see a list of transplant episodes.

The screenshot shows a patient's Epic chart for Kathryn D. Kidney. The patient's name, gender, age, date of birth, MRN, and code are displayed. A tooltip is shown over the cooler icon, listing all transplant episodes. The tooltip contains the following information:

- All Transplant Episodes**
- Liver Transplant - 4/28/2019 (#1)**
- Status: Active Follow-up on 4/28/2019
- Coordinator: Epic User

The patient's chart also includes a search bar and the following information:

- Isolation: None
- Kidney Coordinator: Me
- Coverage: None
- Allergies: No Known Allergies
- Pharmacy: None





Storyboard: See Patient's Admission Time

Key Benefits:

- Time saver

Description:

- Quickly find a patient's admission time by hovering over length of stay information in **Storyboard**.

Admitted - 4/30/2020 **1001**
Admitting provider: Hanna Pan, MD
Total duration of encounter: 11d
Admitted to inpatient: 4/30/2020 **1241**
Inpatient length of stay: 11d

Current Department - EEN ICU DEPT
Patient class: Inpatient
Time in unit: 11d



Epic Updates



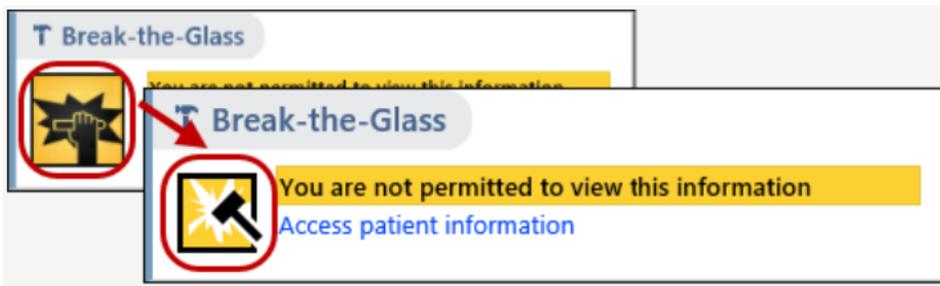
New Break-the-Glass Icon in Reports

Key Benefits:

- Time saver

Description:

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



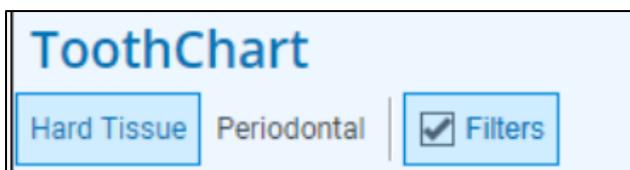
It's Easier to Tell When a Toolbar Button Is Selected

Key Benefits:

- Time saver

Description:

- A checkbox or button now appears on many toolbars' buttons throughout Epic so that it's clearer when you've selected a button.





More Obvious When You're Viewing Information for Deceased Patient

Key Benefits:

- More efficient

Description:

- The patient photo or the patient initials appearance makes it more obvious when you are viewing information for a deceased patient in the following parts of the system:
 - **Storyboard**
 - **In Basket**
 - Other workspace headers that include a patient photo



- The patient photo appears in grayscale.
- Patients initials appear in a gray circle.
- The circular border around the patient photo or initials is black.
- **Deceased** appears under the patient photo or initials.





F1 Help Activity Name Change

Key Benefits:

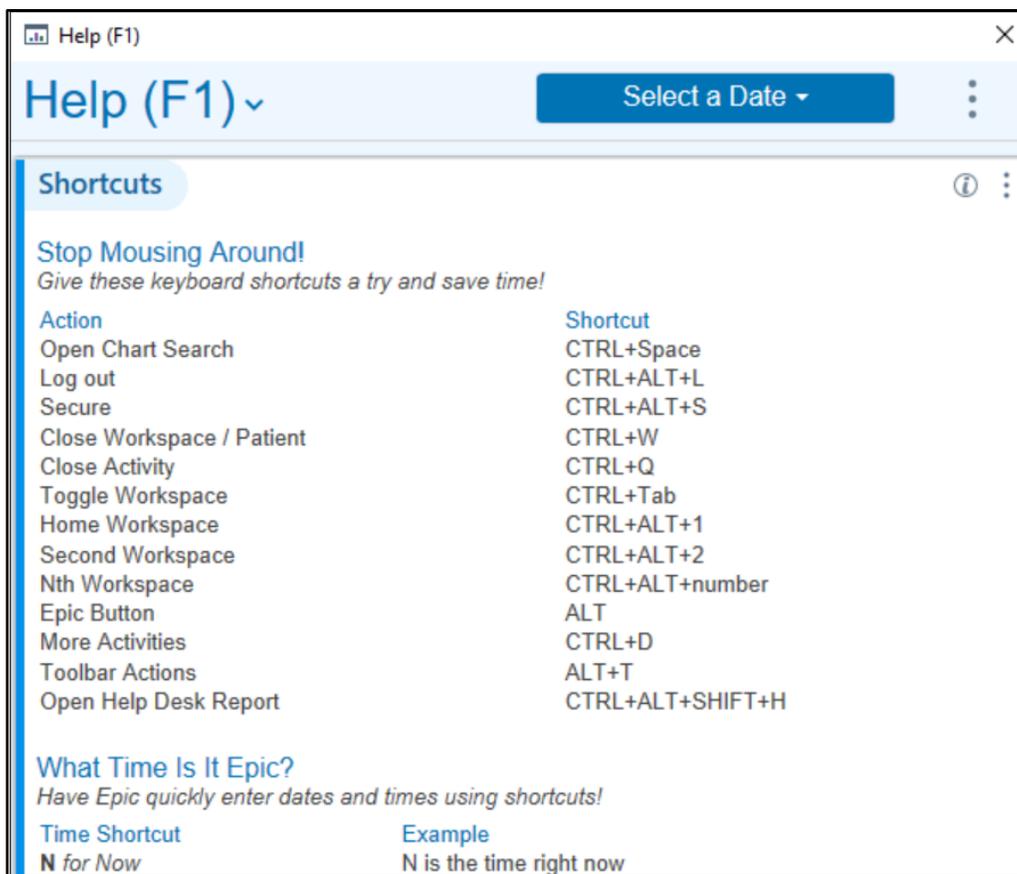
- More efficient

Description:

- The **F1 Help** activity name has changed to **Help (F1)** activity. This update emphasizes what you want when accessing the activity and the name is more logical.

How to:

1. Access **Help (F1)** by pressing F1 on your keyboard.
2. Access **Help (F1)** thru the **Epic** dropdown menu.
3. Access **Help (F1)** using the **Chart Search** feature.



Clinic Managers



Edit Clinic Hours of Operation

Key Benefits:

- More efficient

Description:

- Keep patients informed of your clinic hours in **MyChart** with the **Hours of Operation** activity.
- You can set clinic hours and enter overrides for dates when the hours are different than usual.

Hours of Operation: EMC FAMILY MEDICINE [10501101] ×

This information is used to display hours of operation to patients on the On My Way application

Regular Hours

| Day of week | Open? | Opens at | Closes at |
|-------------|-------------------------------------|----------|-----------|
| Sunday | <input type="checkbox"/> | | |
| Monday | <input checked="" type="checkbox"/> | 08:00 AM | 05:00 PM |
| Tuesday | <input checked="" type="checkbox"/> | 08:00 AM | 05:00 PM |
| Wednesday | <input checked="" type="checkbox"/> | 08:00 AM | 05:00 PM |
| Thursday | <input checked="" type="checkbox"/> | 08:00 AM | 07:00 PM |
| Friday | <input checked="" type="checkbox"/> | 08:00 AM | 05:00 PM |
| Saturday | <input type="checkbox"/> | | |

Upcoming Holidays (Next 7)

Clinic appears as closed on these days unless there is an override

| Date | Day of week | Holiday |
|------------|-------------|----------------|
| 07/03/2020 | Friday | FOURTH OF JULY |
| 09/07/2020 | Monday | LABOR DAY |
| 11/26/2020 | Thursday | THANKSGIVING |
| 11/27/2020 | Friday | BLACK FRIDAY |
| 12/25/2020 | Friday | CHRISTMAS |
| 01/01/2021 | Friday | NEW YEAR'S DAY |
| 05/31/2021 | Monday | MEMORIAL DAY |

Upcoming Overrides

These always take precedence over Holidays and Regular Hours

| Date | Day of week | Open? | Opens at | Closes at |
|-------------------------------|-------------------------------|-------------------------------------|-------------------------------|-------------------------------|
| 07/03/2020 | Friday | <input checked="" type="checkbox"/> | 08:00 AM | 12:00 PM |
| <input type="text" value=""/> | <input type="text" value=""/> | <input type="checkbox"/> | <input type="text" value=""/> | <input type="text" value=""/> |

Past Overrides

| Date | Day of week | Open? | Opens at | Closes at |
|------------|-------------|-------------------------------------|----------|-----------|
| 05/21/2020 | Thursday | <input checked="" type="checkbox"/> | 08:00 AM | 12:00 PM |

✓ Accept
✗ Cancel



Clinic Managers



New Filters Available in SlicerDicer

Key Benefits:

- More efficient

Description:

- You can now use the following filters in **SlicerDicer**:
 - 42183-Scheduled Online?
 - You can determine the usage of scheduling in **MyChart**.
 - 42184-Portal Active at Scheduling?
 - You can determine if the patient was **MyChart** active at the time of scheduling.
 - 42185-eCheck-In Available?
 - You can determine if **eCheck-in** was available for the appointment.
 - 42186-eCheck-In Status
 - You can determine if the patient used **eCheck-in** for the appointment.
 - 42187-Portal Reason for Visit
 - You can determine the reason for visit the patient provided during portal scheduling.
 - 42188-Days Saved by FastPass
 - 42189-FastPass Response Time
 - 42192-Minutes of Excess Wait Time
- For example, you can determine the usage of scheduling in **MyChart** with the **Scheduled Online?** filter.

