

Feb. 21 Epic Update Companion



PAS – Registration-Financial Assistance-Transfer Center

Updated: 1/26/21

This *Update Companion* is prepared for the following job roles/functions:

- Registration Staff
- Insurance Verification Staff
- Transfer Center Staff
- Management Staff

Top Changes for Role/Department:

1. [Scan Driver's Licenses in Patient Lookup.](#)
2. [Today's Patients Report Now Modernized and Organized.](#)
3. [Capture Signatures in a Refreshed Activity.](#)
4. [Transfer Center Updates.](#)



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: **adtpa**

Playground Password: **epic**

Key workflows for you to practice include:

- Open up the **TPR** and review the new updated look.
- Go to **Billing Activities**, select **Cash Drawer** to view the new updated look.
- Add a W/C guarantor to patient Levi Aardvark and complete the new **Claim Form**.



Patient Look Up



Scan Driver's Licenses in Patient Lookup

Key Benefits:

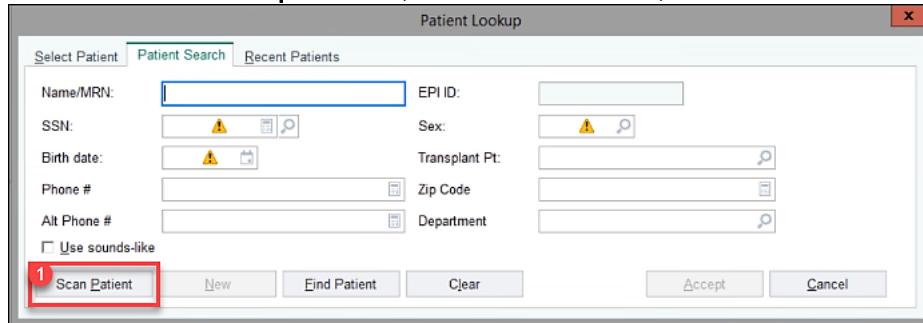
- Patient safety

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 drivers 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, next encounter or most recent encounter appears in the left column.
 - a. As you sign in, check in and admitting patients throughout the day, the buttons for those **actions** now show up just under the encounter information, instead of the bottom of the window.
 - b. Button size is determined by how likely you are to select it for a given encounter, so it's easy for you 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 ensure you're choosing the correct patient.
2. Other encounters for the day, leaves of absences and schedulable orders appear in the right column.



Registration – Insurance Verification – Transfer Center

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Today's Patients Report - HM TPR-All Patients

Refresh Apps Patient Station Ready to Move

Search patients: 11/30/2020 Yesterday Today Tomorrow

Name	MRN	DOB	Gender	Wait Status
Acadia, Willowbcbisp	10011...	01/01/69	M	
Adt, Texantwo "Three"	10011...	01/01/87	M	
Adtess, 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, Prodoc	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...	12/28/03	F	
Chgt, Oregtesting	10015...	02/13/84	F	
ClinDoc, Ann A	10012...	04/20/50	F	
ClinDoc, Tom E	10012...	06/02/45	M	
Crd, Obstime	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 Blvd
 HOUSTON TX 77030

Contact Info: 225-777-6666
 MyChart

Patient Contact: Doemji, Kkk
 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 High Priority Comments: New

Actions

a

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 is deceased, information now appears 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
Surgery - Unposted	9:40 AM	MAIN OR ROOM 1	Sally Silver, MD

E-Signatures



Capture Signatures in Refreshed Activity

Key Benefits:

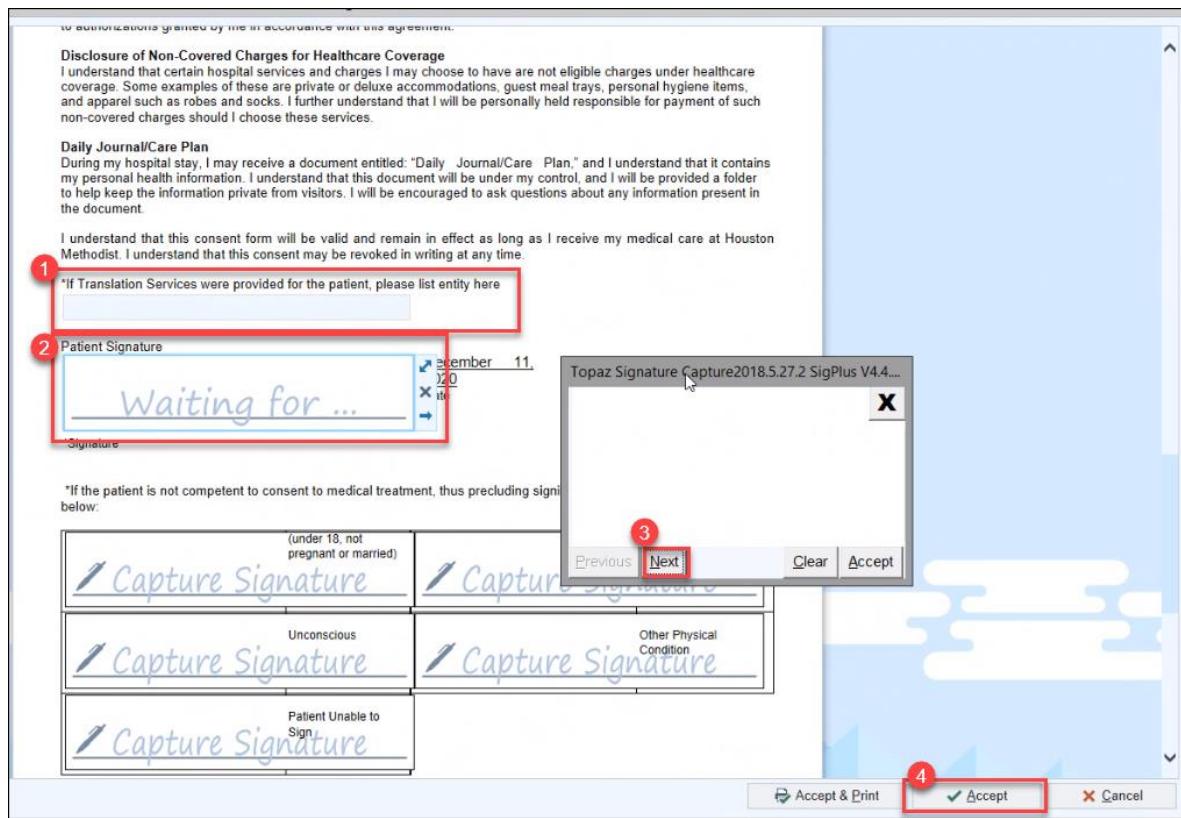
- More efficient

Description:

- Entering signatures gets a new look with some 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 inside 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.



Transfer Center



Jump to Intake Encounter from Transfer Center Requests

Key Benefits:

- More efficient

Description:

- When you need to see a patient's clinical history, select **Encounter** instead of **Chart**. You'll see all the same information that you could with the patient's chart, and you can now add notes to that intake encounter.

Patient Accepted X Cancel Request Patient Station Encounter

Pickard, Wesley i
21 yrs M (05/07/1999) MRN: BCA111
Pending
Request #: 1648

Referring Facility
Not yet determined
Received: 6/25/2020 1:48 PM

Target Facility
CENTRAL
HOSPITAL

TC SOCIAL APPROVAL is next
1 of 4 approved

Registration – Insurance Verification – Transfer Center

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Transfer Center Now Available During Downtime

Key Benefits:

- More efficient

Description:

- The **Transfer Center** activity is now available from read-only environments during system downtime.
- Use the read-only activity to reference requests that were in the system before downtime started. You can't create or edit transfer requests, so continue using the existing downtime process for documenting new requests.

The screenshot shows the Transfer Center (Read-only) interface. At the top, a patient profile for Appleton, Julie is displayed, showing her age (49), gender (F), and MRN (BCA10539). The Referring Facility is ST. CECILIA HOSPITAL, and the Target Facility is Epic Hospital. A message indicates that the activity is currently read-only. Below this, the interface is divided into several sections: Initial Information, Location Selection, Source Admission, Transportation Info, Transfer Info, Clinical Information, Docs, and Documents. The Location Selection section shows a list of possible locations, with Epic Hospital selected. The Source Admission section shows a list of patients being transferred. To the right, a sidebar titled 'Contacts' lists several healthcare providers with their initials (BA, LR, MA) and names, along with their status (Accepting Provider, Approved, Declined). A 'History' section at the bottom right shows a recent approval for Lauren Royce.



Eligibility



Automatically Pull a Patient's Coverage Info

Key Benefits:

- 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 coverage with the patient's demographic information. Previously, you had to click **Pull Info** to populate this information.

Subscriber Info

Subscriber Demographics

Name:	WEBB,BILL	Associated patient:	WEBB,BILL	<input type="button" value="Select"/>
Address link?	Yes	Medicare #:	xxxxxxxxCC11	
Address:	1979 Milky Way	Rel to guarantor:	Self	<input type="button" value="Search"/>
City (or ZIP):	LA VISTA	SSN & type:	xxx-xx-3223	<input type="button" value="Search"/>
State:	NE <input type="button" value="Search"/>	Sex:	M <input type="button" value="Search"/>	Birth date: 5/8/1950 <input type="button" value="Search"/>
County:	SARPY <input type="button" value="Search"/>	Home phone:	402-222-2332	
Country:	United States of America <input type="button" value="Search"/>	Work phone:		
		Fax:		

Subscriber Employment

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



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 the 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:	Dually Eligible Beneficiaries ABN	Comments:	
Notice status:	Notice Triggered [1]	Time updated: 01:40 PM	
Communication barriers:		Date updated: 7/16/2020	
Notice adjustments:			
Service	Additional Explanation for Non-coverage	Original Estimated Cost	Estimated Cost Override
1 DEBRIDEMENT		414.00	
2 MR HEAD WO IV CONTRAST		1084.00	

Print **Refresh** **Accept** **Cancel**





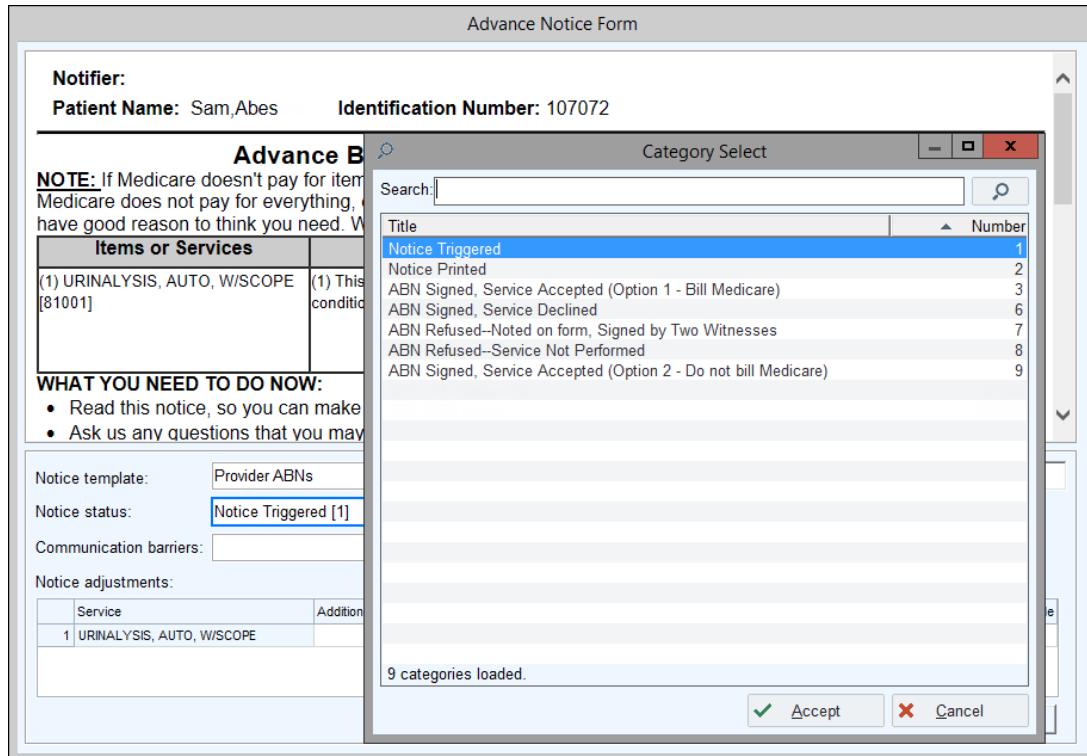
You Can No Longer Mark ABNs As Void

Key Benefits:

- 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.



Estimates



Surgical Estimates Now Calculated Based on History from Locations with Same Place of Service Type

Key Benefits:

- More efficient

Description

- Because ambulatory surgical centers and hospital centers often charge differently, surgical case estimates are now calculated from price history for locations with the same type of place of service as the scheduled OR location.
- When you apply filters to a surgical estimate, you now can search for all locations with the same place of service type instead of just searching for all locations.
- A new option for the **Location** filter lets you search for all locations with a certain type of place of service.

Benefits Surgical Case Related Information

Surgery with Surgeon Lucyk
at Bluefin North Hospital

Surgical Case 24738

LIVER BIOPSY

Performed 16 times since 5/6/2019 (Filters Applied)

Location
All Ambulatory Surgical Center Locations

Patient Class
All

Base Class
All

Procedure Code
All

Clear All





Estimate Information Appears to Guarantors During Prepay

Key Benefits:

- More efficient

Description

- When a guarantor is prepaying in **MyChart** for a visit that has an estimate, an estimate summary now appears on the **eCheck-In** payment step.
- To review their estimate, they can open it directly with the **View Estimate Details** link. This link appears only on the **MyChart** website, not on the mobile app.

Payment

Complete your payment below.

Payment for This Visit

Prepay

Estimate Summary
Reference #10773

Copay <small>i</small>	\$20
5% Coinsurance <small>i</small>	\$2
Discount (10%) <small>i</small>	-\$2
Surcharge <small>i</small>	\$1
Your Estimated Payment	\$21

[View Estimate Details](#)

Select Amount To Pay

\$10.52 (Amount due)
\$21.04 Prepay due
-\$10.53 Discount (if paid in full by 5/26/2020)

Other amount

PAY \$10.52 **CANCEL**



Cash Drawer



Quickly View Cash Drawer Summary and Receipts

Key Benefits:

- Fewer clicks

Description:

- New **Cash Drawer** helps you find information quickly and with fewer clicks. The **Summary** 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

Summary

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

Enter Closing Information

Envelope #: Envelope amount: 80.00

Collector:

Discrepancy reason:

Comment:

Match Drawer Contents to Posted Payments

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

Print Previous Closing Reports Refresh Save Close Drawer



Claim Information



Fresh Look for Claim Info

Key Benefits:

- Improved workflow

Description:

- Quickly document claims with the new **Claim Info** activity. Scroll through the sections or use the table of contents (A) to quickly jump to the form you need.

How to:

1. When you launch **Claim Info**, a window opens so you can select a claim information record.
2. Open an existing claim information record, associate it with the patient or create a new claim information record.
3. After you select a claim information record to open, the full activity launches with all sections already open. Either scroll or use the table of contents to quickly jump to the section you need.



Financial Assistance



Document More Information in Financial Assistance

Key Benefits:

- Improved workflow

Description:

- You can now document the fiscal year, number of dependents and comments in the **Case Status**, **Income**, **Expenses** and **Assets** sections in a patient's **Financial Assistance** case.

How to:

1. In the **Case Status** section, you can document the **Fiscal Year**. Note: If populated, this value appears in **Case Summary**.
2. In the **Income** section, you can document the **Number of Dependents**.
 - a. Use the **Comment** section to document any necessary comments.
3. You can also use the **Comment** boxes in **Expenses** and **Assets** sections of the **Financial Assistance** tracker, if needed.

The screenshot shows the Financial Assistance tracker interface. The **Case Status** section (1) includes fields for Status (InProgress), Primary Contact (FLYNN, TESTING), Assigned User (KING, KERRY L.), Application Provided On (6/2/2020), Application Signed On, and Fiscal Year (2020). The **Income** section (2) shows Family Size (5), Number of Dependents (3), Type (Employment (Full-Time)), Frequency (Monthly), Hours Per Week, Amount (3,000.00), and a Comment box (Monthly income). The **Expenses** section (3) shows Type (Rent), Frequency (Monthly), Amount (985.00), and a Comment box (Monthly rent). The **Assets** section shows Type (Bank Account), Amount (2,300.00), and a Comment box (Bank account assets). Red boxes and numbers 1, 2, and 3 highlight the **Fiscal Year**, **Number of Dependents**, and the **Comment** boxes in the **Income**, **Expenses**, and **Assets** sections respectively.





More Effective Financial Assistance Trackers

Key Benefits:

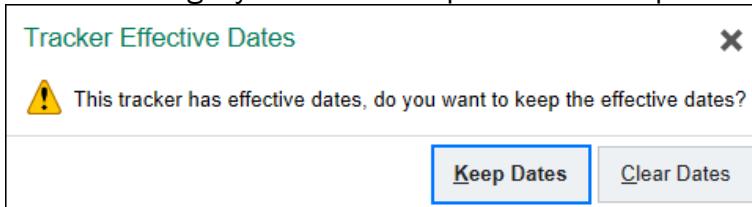
- More efficient

Description:

- If you know effective dates for a tracker before having it approved, you can now enter start and end dates while the tracker is still pending.
- If financial counselors know effective dates for a tracker before it's approved, they can now enter dates in the **Start Date** and **End Date** fields while the tracker is still pending. Previously, these fields were read-only until the tracker was approved.

How to:

1. When a **Financial Assistance** tracker is approved and already has effective dates, you will see a window asking if you want to keep the dates set previously or use the default approval dates.



2. When a tracker reverts from **Approved** to **Pending**, you see a window asking if you want to clear or keep the effective dates.

Basic Info

Status

🔍

Effective Dates (Start - End)

📅
📅

Comments

Summary

Details

⊕
abc
🕒
🕒
?
?
+
Insert SmartText
🔗
↳
↳
⤒
⤒

100%

⚠

Decision Date

📅

Application Received Date

📅

Decision Details

🔍

Responsible User

🔍



Account Maintenance



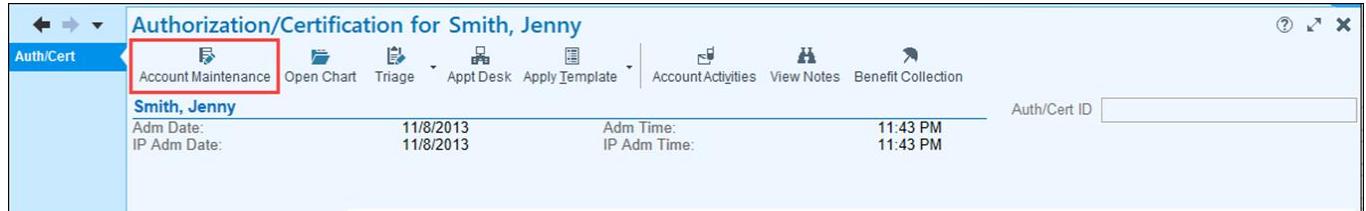
Account Maintenance Button in Auth/Cert Records Opens Encounter's Primary HB HAR

Key Benefits:

- More efficient

Description:

- The **Account Maintenance** button now always takes you to the **primary Hospital Billing HAR** on the encounter. Previously, it might have led to a Professional Billing visit HAR or an incorrect HB HAR.
- If you've developed a workaround for this, take note.



Scanning



Link Scanned Documents to Coverage

Key Benefits:

- Time saver

Description:

- When scanning insurance cards and other documents, you can now link the scanned items to the correct coverage, keeping the patient's records clean and up to date.
- If patients upload coverage documents in **MyChart** or **Welcome**, these documents are now linked to the patient's corresponding coverage automatically.
- The **Coverage Linking** window appears either automatically after you scan a coverage document or after you click the **Link to a Coverage** button in the **Document Edit** window.
- If you link a document to a coverage that already has linked documents, the existing documents are marked as expired.
- Linked documents show the coverage name and an umbrella icon. If the linked coverage has expired, the document is marked as expired and an umbrella icon with a red X appears.

How to:

1. Click **Link to a coverage**.
2. Select the correct insurance coverage to link the document to the patient's coverage.
3. Click **Accept**.
4. Linked documents show the coverage name and an umbrella icon.

Documents

New Document Type + Add + 1 Insurance Card

Type Status Received By Received On Expires On

Hosp - Consent for Treatment Not Received - - -

Photo ID Not Received - - -

Insurance Card - - -

1 E-BCBS/BCBS CHOICE PPO/FEDERAL EMPL PPO

Document Information

Add Insurance Card

View E-Sign Scan Expire Delete

Document Type Status

Insurance Card

Description

Received By

Dates

Miscellaneous

Signature Signed By

Relationship

Witnesses

Choose a Coverage to Link

Link the Insurance Card to one of the coverages below

E-BCBS/BCBS CHOICE PPO/FEDERAL EMPL PPO
TURNIP.HMSTJ
Effective since 10/1/2009

Accept Cancel



Claim Edit Workqueues



Navigate Updated Hospital Billing Claim Edit Workqueues

Key Benefits:

- Improved workflow

Description:

- Claim edit workqueues have a new, more modern layout.
- The detailed view section at the bottom of the screen now has color-coded cards with detailed information about the claims. You can use this to quickly assess and prioritize errors.

Claim Edit WQ REGISTRATION ERRORS-NON WC/TPL [1409] Last refreshed: 5/19/2020 10:12:00 AM

De Score	Invoice	Account Name	Claim Status	Account Class	Payer	Amount Due	Expected Reimt	Discharge Date	Errors
60	100251000	PEGG,ARES	Edited	Therapies Se...	MEDICARE	120	0.00	11/30/2017	3
60	100093607	DALE,LOREN C.	Edited	Outpatient	MEDICARE	50	0.00	04/03/2017	3
60	100094800	DAVIS,LAWRENCE	Edited	Outpatient	MEDICARE	50	0.00	04/03/2017	3

Claim Summary

Primary Claim (Edited)

Error Claim

Invoice 100093607 | E-UB | TOB 131

MEDICARE | MEDICARE
PART A AND B

Claim class: Outpatient

Total Charges
50.00

Claim Errors

Last Claim Test: 5/13/2020 11:21 AM

User Error
Code Message

100 Service dates of charges on claim not within effective dates of coverage
MEDICARE/MEDICARE PART A AND B (FO=2) [70090]
600 Needs to run OCE edits. [71211]

Master File Error
Code Message

500 Referring provider CARDIOLOGY ASSOCIATES OF MADISON, is
missing an NPI. [Rule 70322]

Recent History



Registration – Insurance Verification – Transfer Center

Feb. 21 Epic Update Companion



Fix Errors Faster with Redesigned Claim Edit Assistant

Key Benefits:

- More efficient

Description:

- The **Claim Edit Assistant** has a completely new layout, putting the information you need at your fingertips. Use the new sidebar to view claim information and errors side-by-side and make edits more quickly.

The screenshot displays the Epic Claim Edit Assistant interface. On the left, a sidebar contains patient information for Archibald Flint, including a photo, gender (Male), age (70), and birth date (5/27/1950). It also shows account details (Account: FLINT, ARCHIBALD, Invoice: 101280800, Payer: MEDICARE, Form: (E) CLAIMS HB CEV 837 V5010 INSTITUTIONAL), outpatient status (5/26/2020, EHS PARENT HOSPITAL LOCATION), balances (Total: 66.32, Pre: 66.32, Ins: 66.32, SP: 0.00), and coverage (1 MEDICARE - MEDICARE PART...).

The main area is divided into several sections:

- Claim Summary:** Shows an error claim (Invoice 101280800 | E-UB | TOB 131 MEDICARE | MEDICARE PART A AND B, Claim class: Outpatient). It lists total charges (\$356.50) and claim mailing address (MEDICARE, 123 ANYWHERE STREET, VERONA, WI 53593).
- Recent History:** A timeline of recent activity, including "Added to workqueue" entries for "MANAGER-CLAIM DATE MONITORING 15 DAYS OL..." and "BILLING ERRORS-ATTACHMENT REVIEW [2989]".
- Claim Attachments:** Lists attachment record ID (3688), type code (Radiology Reports [RR]), and status (Not Generated).
- Claim Edit Workqueues:** Shows workqueues for "ADMIN-CATCH ALL QUEUE [1403]" and "REGISTRATION ERRORS-NON WC/TPL [1409]" with a days dropdown set to 72.
- System:** Displays claim details (Form: CLAIMS HB CEV 837 V5010 INSTITUTIONAL [30890401], Payer: MEDICARE PART A AND B [40000101], Place of Service: EHS PARENT HOSPITAL LOCATION [10199], Location: EHS PARENT HOSPITAL LOCATION [10199], Department: EMH OBSERVATION [10101103], Claim Processing: 72).
- Claim Errors:** A sidebar showing 5 active errors. The first error is "User Errors" (Insurance ID Format is Not Valid, Extension 70176, Rule 71448, Error added: Invalid subscriber identification number. [70176]). The second is "CEV Error - Subscriber Address Invalid" (Rule 71448, Extension 70550, Error added: Invalid subscriber address: all address items are missing). The third is "Claim Has Incomplete Attachment Record" (Rule 71448, Extension 70550, Error added: No encounters were selected for the attachment. Qualified attachment rules: Claims - Radiology Procedures Require Attachment).





Find Fix Instructions in New Claim Edit Assistant Sidebar

Key Benefits:

- Improved workflow

Description:

- Fixing a claim? Click on errors in the new **Claim Edit Assistant** sidebar to see the fix instructions. Make sure you read them all before addressing the problem. The new sidebar doesn't stay open when you go to activities in separate workspaces, such as **Registration**.

The screenshot illustrates the 'Claim Edit Assistant' sidebar, which is part of the 'Claim Errors' interface. The sidebar displays a list of errors, with the first error, 'Claim Has Incomplete Attachment Record', highlighted. A red arrow points from this error to the 'Fix Instructions' section of the sidebar, which is located in the 'Registration' workspace. The 'Fix Instructions' section provides step-by-step guidance for resolving the error.

Claim Errors

Claim Edit > 100902800 Refresh Claim

Showing 4 of 6 Active Errors

User Master File External Overridden

User Errors

Claim Has Incomplete Attachment Record Override 200 - Billing

Extension 70550
No encounters were selected for the attachment.

CEV Error - No Room and Board Charges on Inpatient Claim

Rule 70097
There are no room and board charges on this inpatient claim.

[Charge Entry](#) [Edit Claim Values - Type of Bill](#) [Edit Claim Values - Service Line 1 \(RC: 0000\)](#) [Event Management](#)

CEV Validation - Revenue Code

Rule 71281
[NF] Invalid value: 0000 (line 1) for LINE REVENUE C
[Edit Claim Values - Service Line 1 \(RC: 0000\)](#)

Claim Attachment Needs Review

Rule 70206 700 - Release
The claim attachment needs to be reviewed and completed.

Fix Instructions

No reports or encounters were selected for the attachment.

1. Use the claim attachment button to open the claim attachment activity.
2. Go to the Electronic Medical Records section and select the appropriate reports and encounters.
3. Close the claim attachment activity.

The attachment record is missing the type code, transmission code, or attachment control number.

1. Use the claim attachment button to open the claim attachment activity and enter the missing information.
2. Close the claim attachment activity.



Patient Station Updates



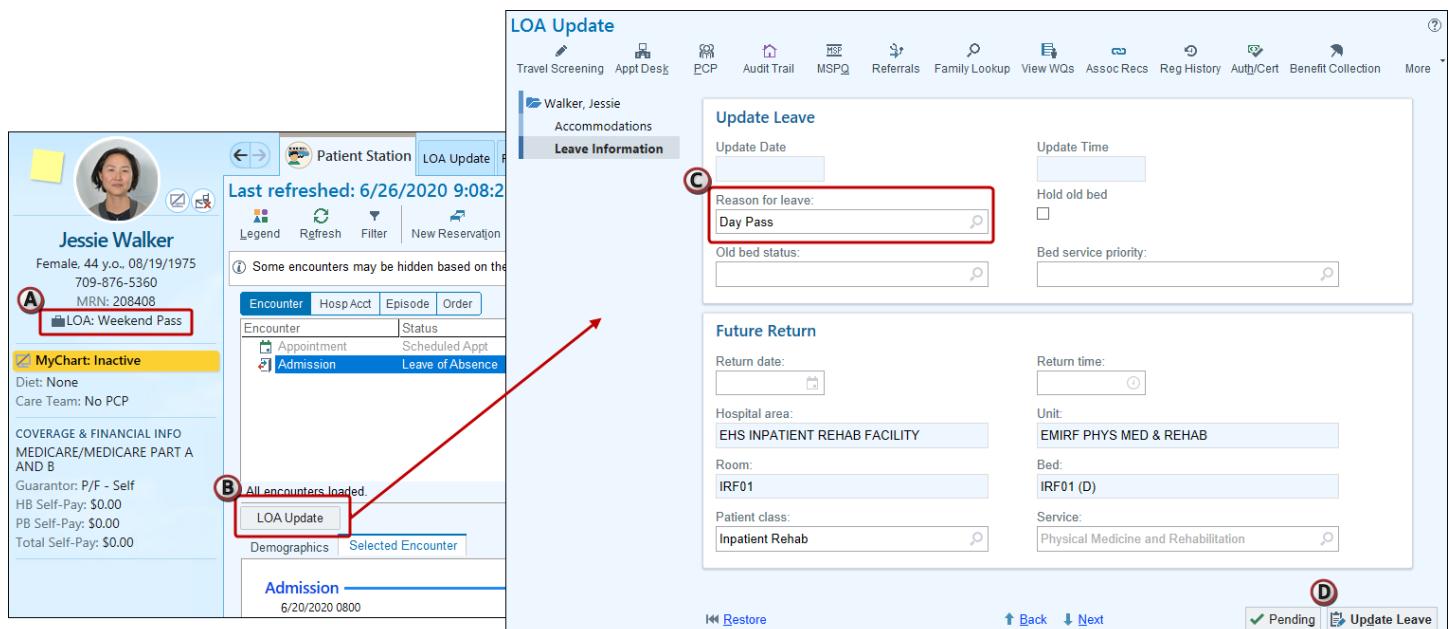
Update Leave of Absence

Key Benefits:

- Improved workflow

Description:

- If you need to update a patient's leave of absence (LOA) information (A), select the **LOA Update** button in **Patient Station** (B).
- This opens the new **LOA Update** workflow. Then, enter the updates (C) and update the leave of absence (D).



Primary Care Providers



Make Sure to Collect Patients' Primary Care Provider Addresses

Key Benefits:

- Improved workflow

Description:

- When a patient is admitted, review their PCP information in the **Care Teams** activity to ensure that their PCP has an active address, so event notifications are sent to the right provider.

How to:

1. If the provider has an inactive address, click **Update Address** to enter an updated address.

Team Member	Relationship	Specialty	Start	End	Updated
PCPs					
Grey, Becky, MD		PCP - General	08/17/2018	☒ End	🕒 8/16/18

This provider has an inactive address.
The system cannot send communications to this address. **Update Address**



Payment Plans



Easily Create Payment Plans from Enterprise Guarantor Summary

Key Benefits:

- Improved workflow

Description:

- The updated **Payment Plans** activity makes it easier to create plans, define terms and see when you need to take action.
- Quickly create a payment plan with all of a guarantor's self-pay balances using guarantor activities from **Enterprise Guarantor Summary**, or use account activities to select individual HARs for a payment plan.

Create Payment Plan

New Plan

Balances

Self-pay accounts not on plan	2,245.67
-------------------------------	----------

New Plan Balance 2,245.67

Terms

Monthly Amount 93.57	Number of Payments 24
Minimum: 0.01	Maximum: 2400

Statement Day Of Month 29 Final Payment August 2022

Add Auto Pay



Payment Distribution



New Look, Simplified Workflow for Enterprise Self-Pay Payment Posting

Key Benefits:

- Improved workflow

Description:

- **Enterprise Self-Pay Payment Posting** is more visually friendly, speeding up your workflow with improved filters, based on account statuses, for manual distribution. In this example, you can de-select **On Payment Plan** to hide payment plan accounts as you distribute a payment.

The screenshot shows the 'Distribution' screen. In the 'Include' dropdown, 'Patient Responsibility' is selected. The 'Advanced Filters' button is visible. The 'Hospital Accounts' section shows two accounts: '4000000610' (Pmt Plan) and '4000001273' (No Stmt). A modal dialog is open, titled 'Outstanding', with two checkboxes: 'On Payment Plan' (checked) and 'Not on Statement' (checked). The 'Apply' button is highlighted with a blue box.



Use Quick Distribution Shortcuts in Payment Collection

Key Benefits:

- Improved workflow

Description:

- When manually distributing payments in **Payment Collection**, use new shortcuts to filter by patient responsibility or all balances with a single click. **All Balances** appears only for non-**MyChart** accounts or in-progress accounts. You can click **Other** for a variety of other context-specific filters.

The screenshot shows the 'Outstanding Self-Pay' screen. The 'Pay Now' section shows a 'Professional' account with a balance of 1,910.85. The 'Due' section shows a balance of 500.00. The 'Remaining to Distribute' section shows a balance of 500.00. The 'Include' dropdown is highlighted with a red box, showing 'Patient Responsibility', 'All Balances' (which is bolded), 'Other', and 'Advanced Filters'. The 'Collecting' button is visible on the right.



Unit Manager



Select Columns to Print in Unit Manager

Key Benefits:

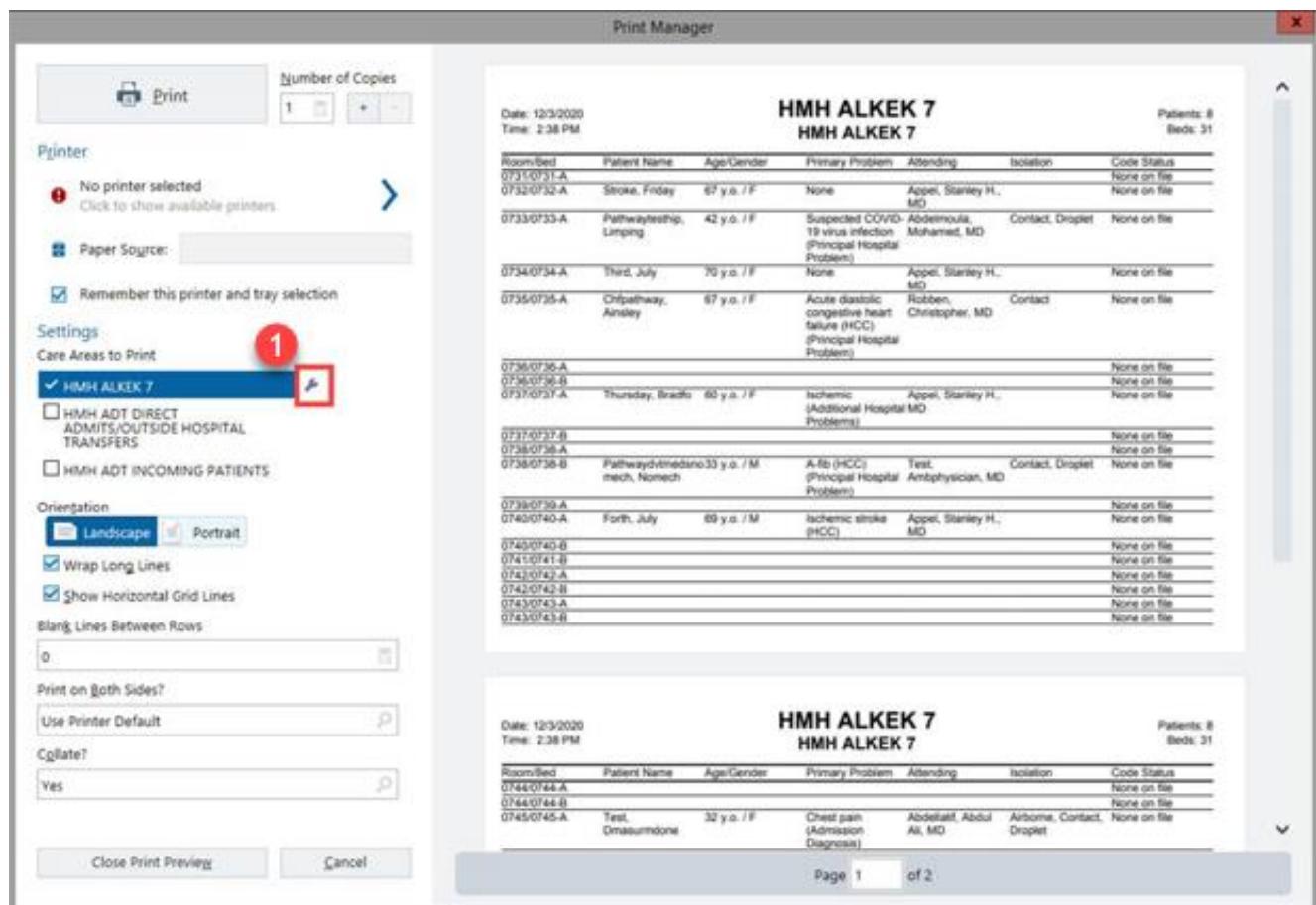
- Personalizing your workflow

Description:

- When you print the **Unit Manager**, you can now choose the columns to print. Use suggested columns that match those used in **Patient Lists** printing, or select custom columns.

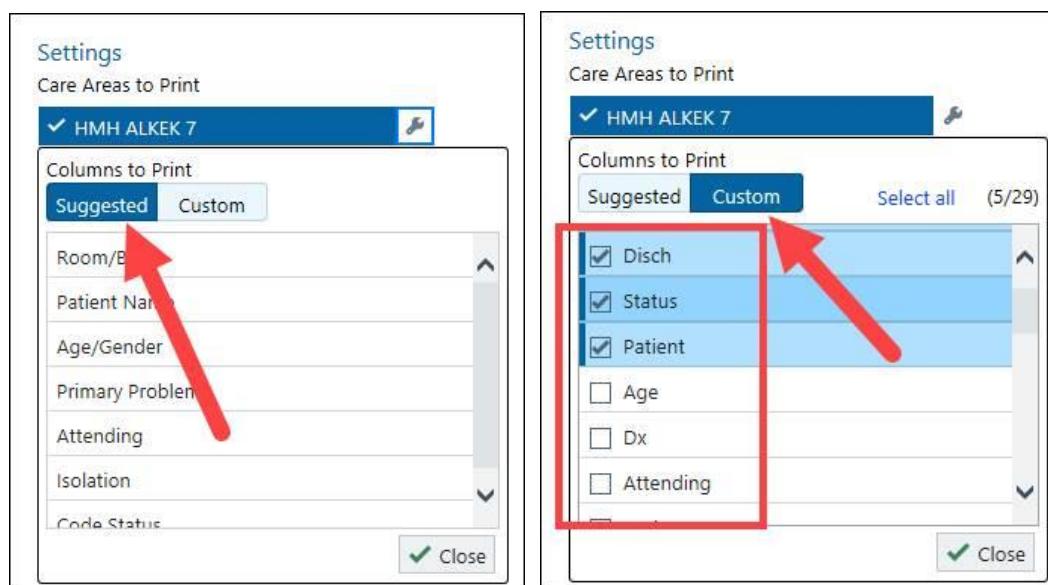
How to:

1. Click the wrench to stay with the **Suggested** columns, choose the **Custom** tab to decide exactly which columns you want to see.



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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.

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





Access Discharge Information

Key Benefits:

- Improved communication
- More efficient
- Time saver

Description:

- You can access a patient's discharge planning information from **Storyboard**.

SELECTED VISIT
Admitted: 3/31/2020 (248 d)
Abdelmoula, Mohamed, MD
Attending
Pt Class: Inpatient
Auth/Cert: No Status
Auth #: None
Fin Status: None

Admitted - 3/31/2020 1359
Admitting provider: Abdelmoula, Mohamed, MD
Total duration of encounter: 248d
Admitted to inpatient: 3/31/2020 1359
Inpatient length of stay: 248d

Current Department - HMH ALKEK 7
Patient class: Inpatient
Service: Hospital Service
Time in unit: 247d

Discharge Plan
Discharge Milestones

1 2 3 4
Next Milestone: Place Discharge Order

⑦ This activity is currently read-only.
You do not have security to edit this activity. Most options within this activity are not available.

Expected Discharge
Expected discharge date and time not yet set for this stay.

Discharge Milestones and Delays

0 of 4 Milestones Completed

0%
Place Discharge Order Complete Med Reconciliation
Enter Post Discharge Transportation Status Request Transport

Pop up when the click on the link





Hover to Discover New Demographics Information

Key Benefits:

- Fewer clicks

Description:

- Easily access more demographics 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>
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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 profile for Kathryn D. Kidney. The profile includes a photo, basic information (Female, 52 y.o., 4/10/1966, MRN: 202870, Code: FULL (has ACP docs)), and clinical status (Isolation: None, Kidney Coordinator: Me, Coverage: None, Allergies: No Known Allergies, Pharmacy: None). A 'Search' bar is also visible. A blue tooltip box is overlaid on the screen, titled 'All Transplant Episodes', showing a single entry: 'Liver Transplant - 4/28/2019 (#1)'. Below this, the status is listed as 'Active Follow-up on 4/28/2019' and the coordinator is 'Epic User'.



Secure Chat



Set Favorites

Key Benefits:

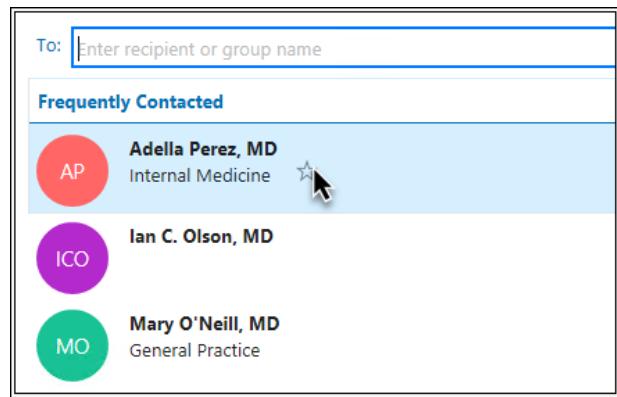
- Improved communication

Description:

- You can now manage your favorite contacts in **Secure Chat** from a workstation. Previously, this functionality was only available on mobile devices.

How to:

1. Use the **Star icon** to add or remove individual recipients or groups as favorites on a workstation.



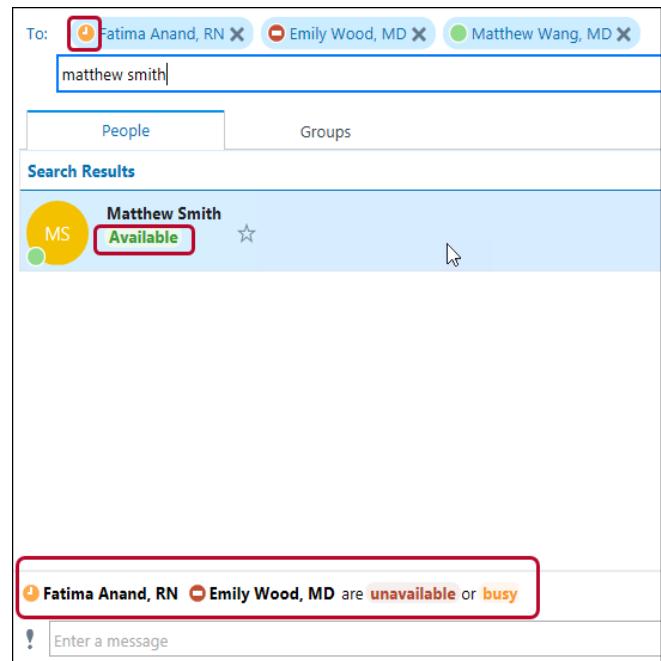
See More Clearly Whether a Colleague Is Available

Key Benefits:

- Easily visible

Description:

- The availability status is easier to recognize on workstations and mobile devices. If someone is busy or unavailable, you can quickly see if you need to find someone else to contact.



SmartPhrase



SmartPhrase Manager: New Look and Streamlined Workflow

Key Benefits:

- Improved workflow

Description:

- **SmartPhrase Manager** modifications make some automatic visual and workflow changes more user-friendly.
- It is easier to search, share and copy **SmartPhrases**. You can also determine the level of phrases you will see.

SmartTexts: SmartPhrase Manager - MD, ROBERT SUTTON [50001] ①

SmartLists: New User SmartPhrase Edit SmartPhrase Lookup Share With Copy To Remove From List Delete Search Search Current List ②

SmartPhrases: Manage Phrases ③

Name	Description	Editors	ID
CLINEXAM	CLINICAL: Screening examination. Clinical breast examination performed by the technologist today.	MD, ROBERT SUTTON	101634
BASEEXAM	CLINICAL: This is a baseline examination. *** FINDINGS: Bilateral CCCL, CC, and MLO views were...	MD, ROBERT SUTTON	101635
FINALASSESS	FINAL ASSESSMENT: BI-RADS: 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

How to:

1. Switch between your Phrases and system Phrases by selecting User, Profile, Department, Location or Facility when the **SmartPhrase Manager** activity is open. By default, User is selected.
2. Use the **Search** field when searching for **SmartPhrases** from the current **SmartPhrase** list.
3. You can access the **Share** and **Copy** actions through two separate toolbar buttons. The new **Copy To** button allows you to create a **SmartPhrase** for specific persons and the **Share With** button allows you to extend an existing **SmartPhrase** for others to use.





Add SmartPhrases to Notes Using SmartLists

Key Benefits:

- Personalizing your workflow.

Description:

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

How to:

1. Go to the **SmartList Editor** (search: **SmartList**) and create a **SmartList**. If you have the security to create system **SmartLists**, 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. Select the **List Phrases** option.
 - 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** into a SmartTool-enabled text box or press F2 to jump to the **SmartList** if it already appears.
 - b. Select the **SmartPhrase** from the **SmartList** and right-click it to save your selection and move to the next wildcard or **SmartList**.

User SmartList – sgnMyProc [12833]

A screenshot of the SmartList Editor interface. The main area shows a list of SmartPhrases under the choice ".erc". The list includes: ERCD, ERCIMGFINDINGS, and ERCIMGPROC. The "erc" choice is currently selected. To the right, there is a "Settings" panel with fields for Name (sgnMyProc) and Display Name. The "erc" choice is marked as "Selectable".

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

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.



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MyChart



Key Benefits:

- Improved workflow
- More efficient

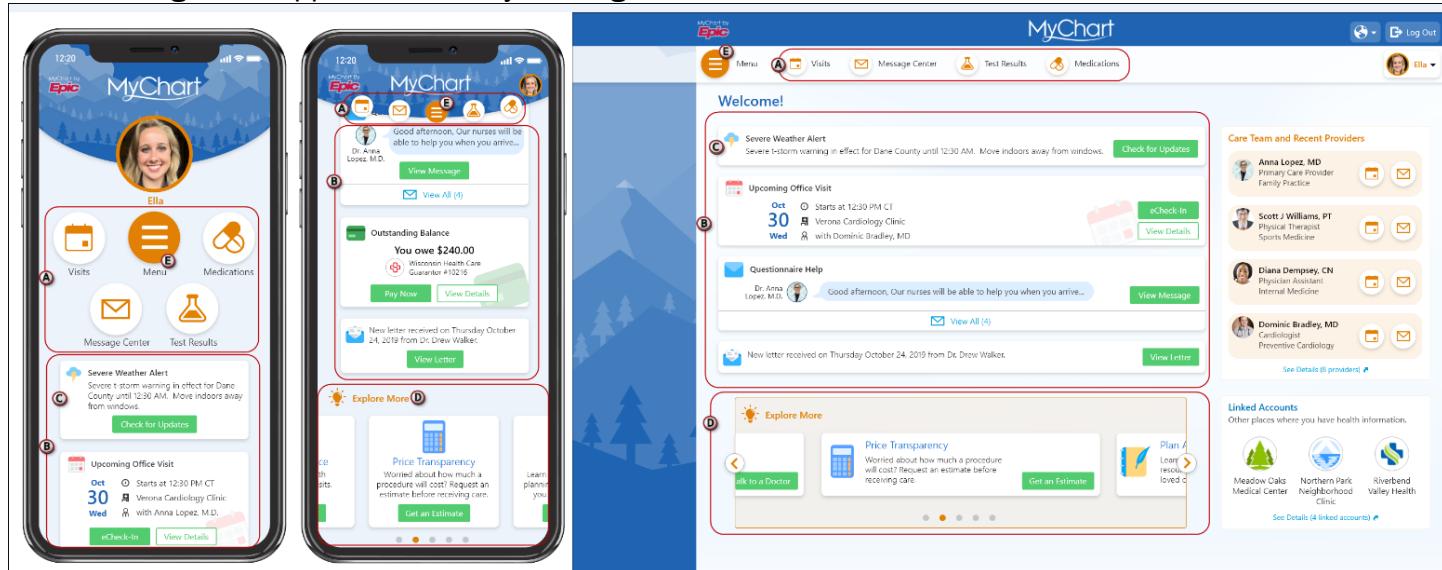
Key Benefits:

- Improved workflow
- More efficient

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.



- A. **Shortcuts** on the homepage provides easy access to the four activities a patient uses the most.
- B. 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.
- C. 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.
- D. The **Explore More** section highlights specific functionality and direct patients to features in **MyChart**.

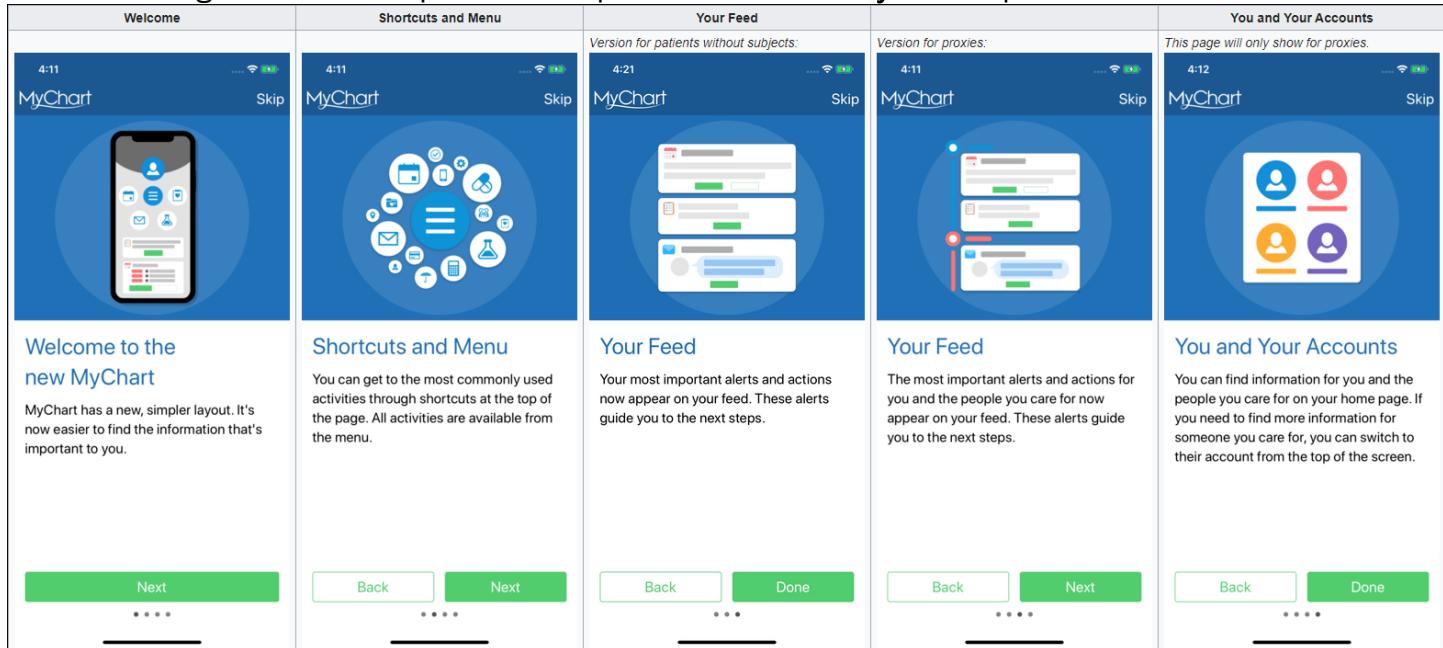


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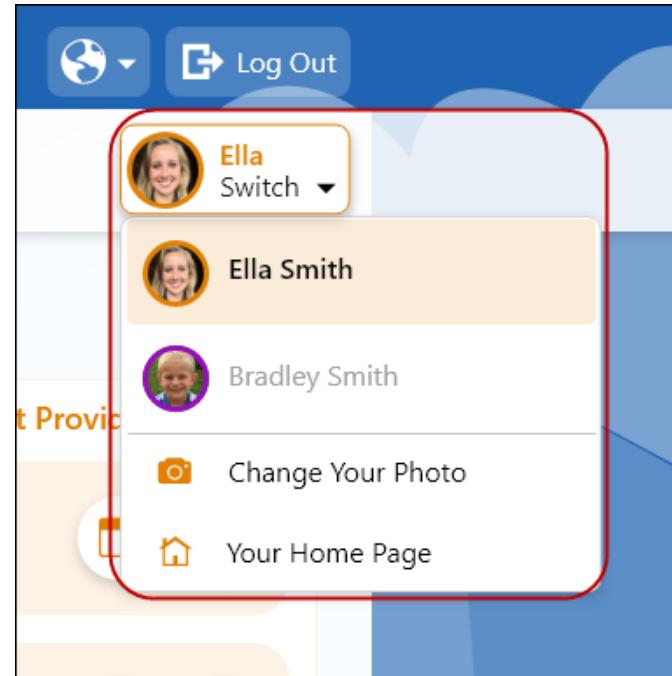
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E. The unified menu provides patients with access to every available activity, in addition to what's accessible through **Shortcuts** or the **health feed**, and patients can search for menu items by name.

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

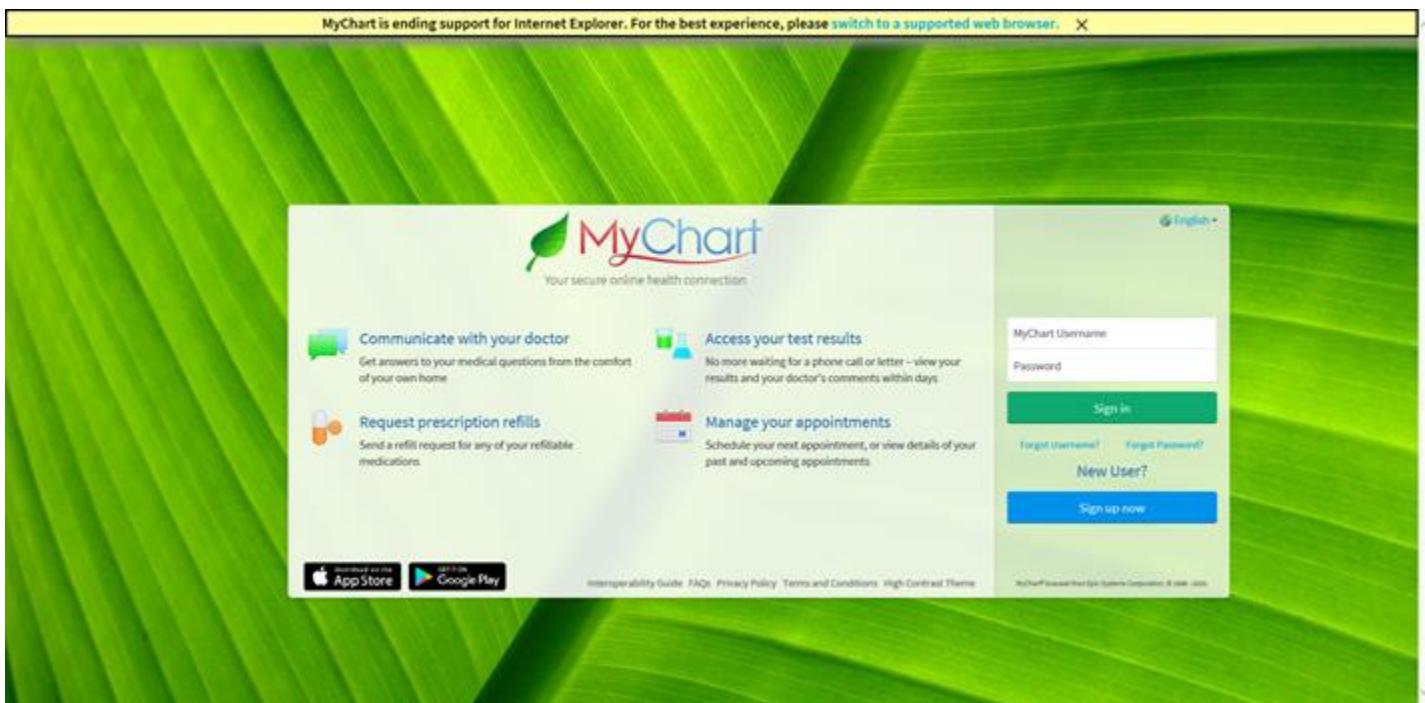
Description:

- To provide a consistent, modern, and accessible experience to **MyChart** users, Internet Explorer 11 (IE 11) will no longer be supported. **MyChart** users' experience in accessibility, performance, and responsiveness has improved since we are moving towards 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** signup) continue to work with IE 11, as does **Share Everywhere**.



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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.



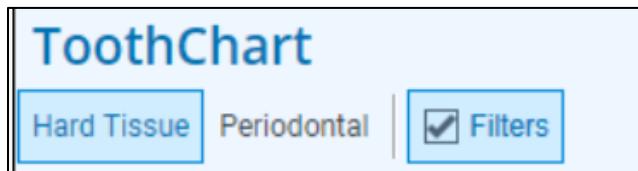
Easier to Tell When Toolbar Button Is Selected

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.





Viewing Information for Deceased Patient

Key Benefits:

- More efficient

Description:

- The patient photo or the patient initials appearance has been updated to make 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 for deceased patients.





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 for epic users.

How to:

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

The screenshot shows the 'Help (F1)' activity interface. At the top, there is a 'Select a Date' button and a 'More' button. Below that, a 'Shortcuts' section is displayed with the heading 'Stop Mousing Around!'. It lists various keyboard shortcuts for actions like opening chart search, logging out, and closing workspaces. A second section, 'What Time Is It Epic?', shows a 'Time Shortcut' of 'N for Now' and an 'Example' of 'N is the time right now'.

Action	Shortcut
Open Chart Search	CTRL+Space
Log out	CTRL+ALT+L
Secure	CTRL+ALT+S
Close Workspace / Patient	CTRL+W
Close Activity	CTRL+Q
Toggle Workspace	CTRL+Tab
Home Workspace	CTRL+ALT+1
Second Workspace	CTRL+ALT+2
Nth Workspace	CTRL+ALT+number
Epic Button	ALT
More Activities	CTRL+D
Toolbar Actions	ALT+T
Open Help Desk Report	CTRL+ALT+SHIFT+H

