Feb. 21 Epic *Update Companion*

PAS – Registration-Financial Assistance-Transfer Center

Updated: 1/26/21

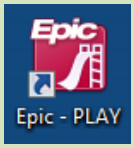
This ***Update Companion*** is prepared for the following job roles/functions:

- 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:

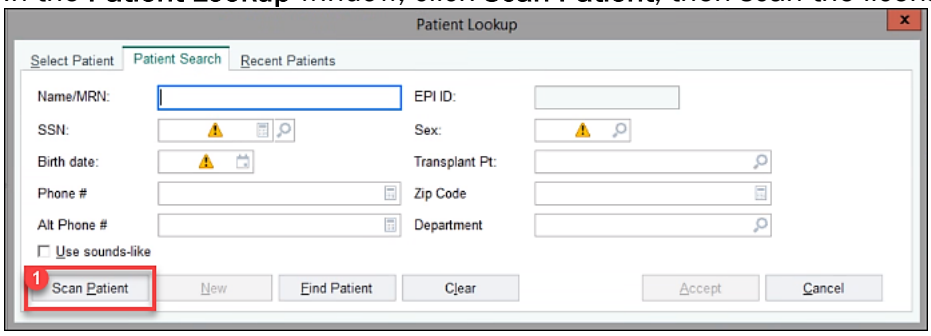
- Patient safety

Description:

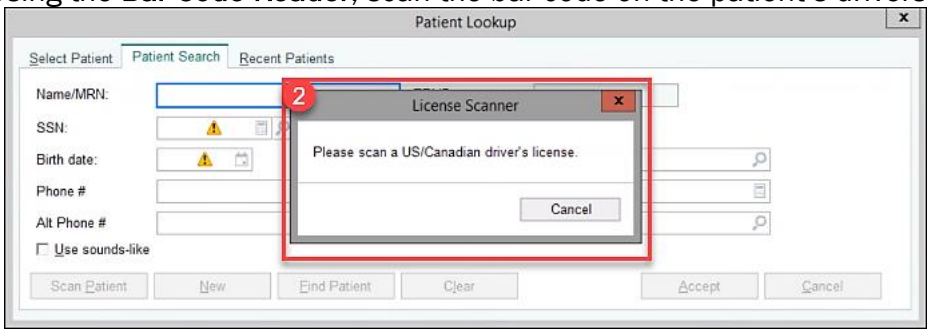
- Save time by scanning a patient's driver's license to look them up rather than typing in their information.

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:

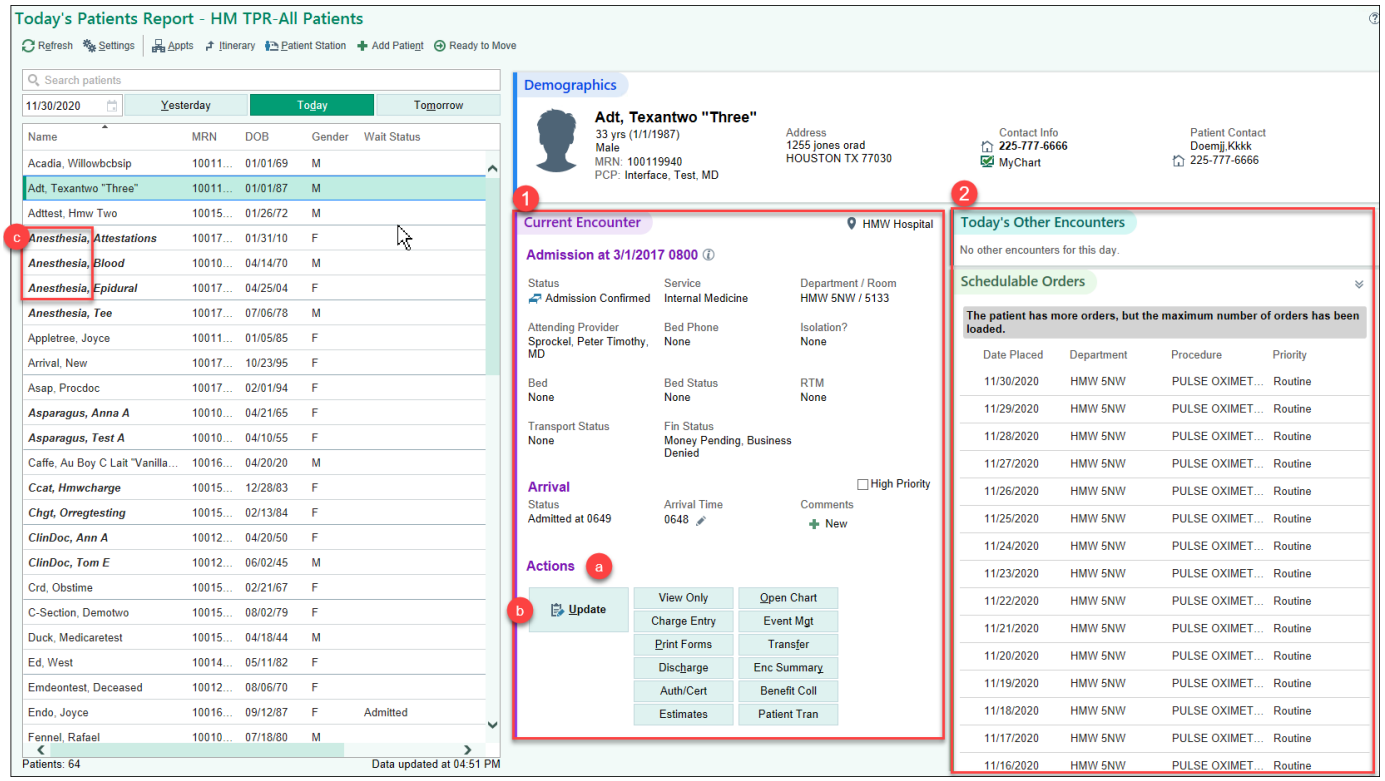
- Patient safety
- More efficient

Description:

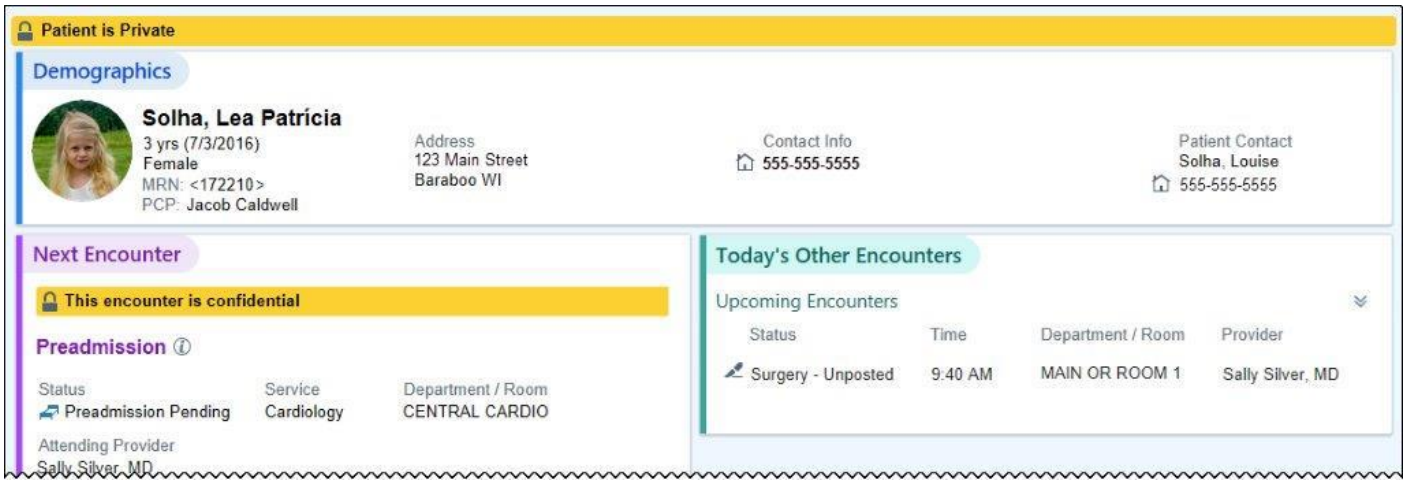
- It's now easier to see the patient's demographics, current encounter and upcoming encounters for the day. You can immediately take action to admit, check in or register the patient.
- Now, encounters are neatly organized in sections that help orient you as you search for a particular encounter.

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.



3. When you <u>select</u> a patient, important messages, like whether a patient has a confidential encounter or is deceased, information now appears in yellow.



E-Signatures

Capture Signatures in Refreshed Activity

Key Benefits:

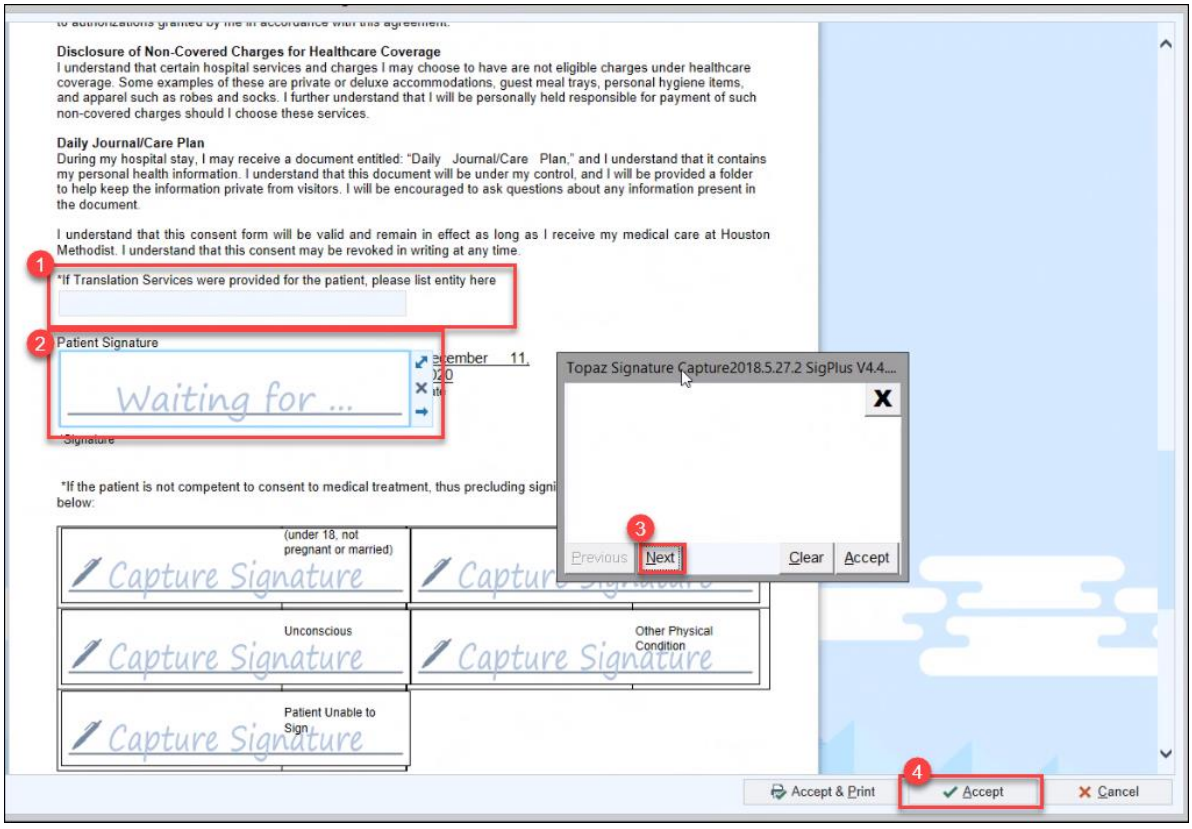
- More efficient

Description:

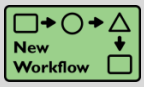
- Entering signatures gets a new look with some additional features, such as setting how you want to enter a signature and moving immediately to the next signature line.

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



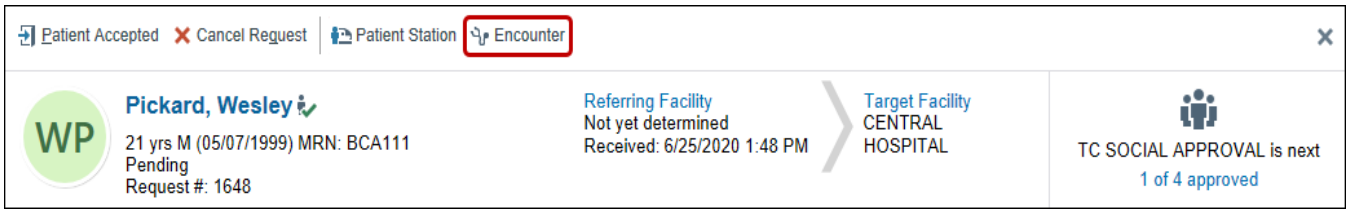
Jump to Intake Encounter from Transfer Center Requests

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.



New Feature

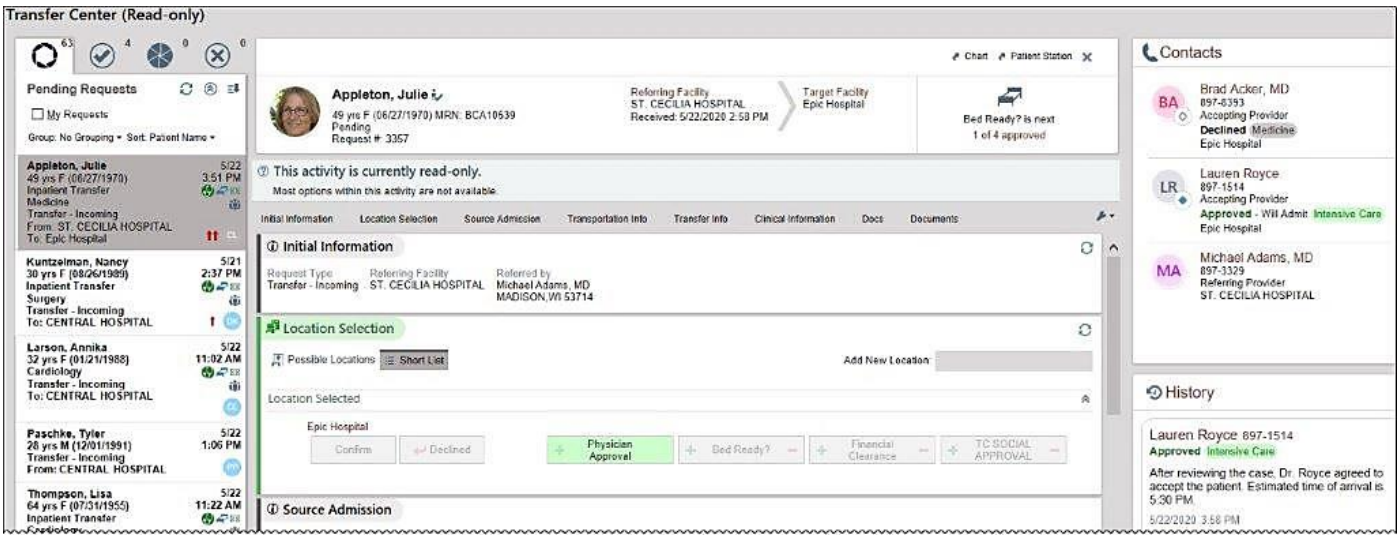
Transfer Center Now Available During Downtime

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.



Eligibility

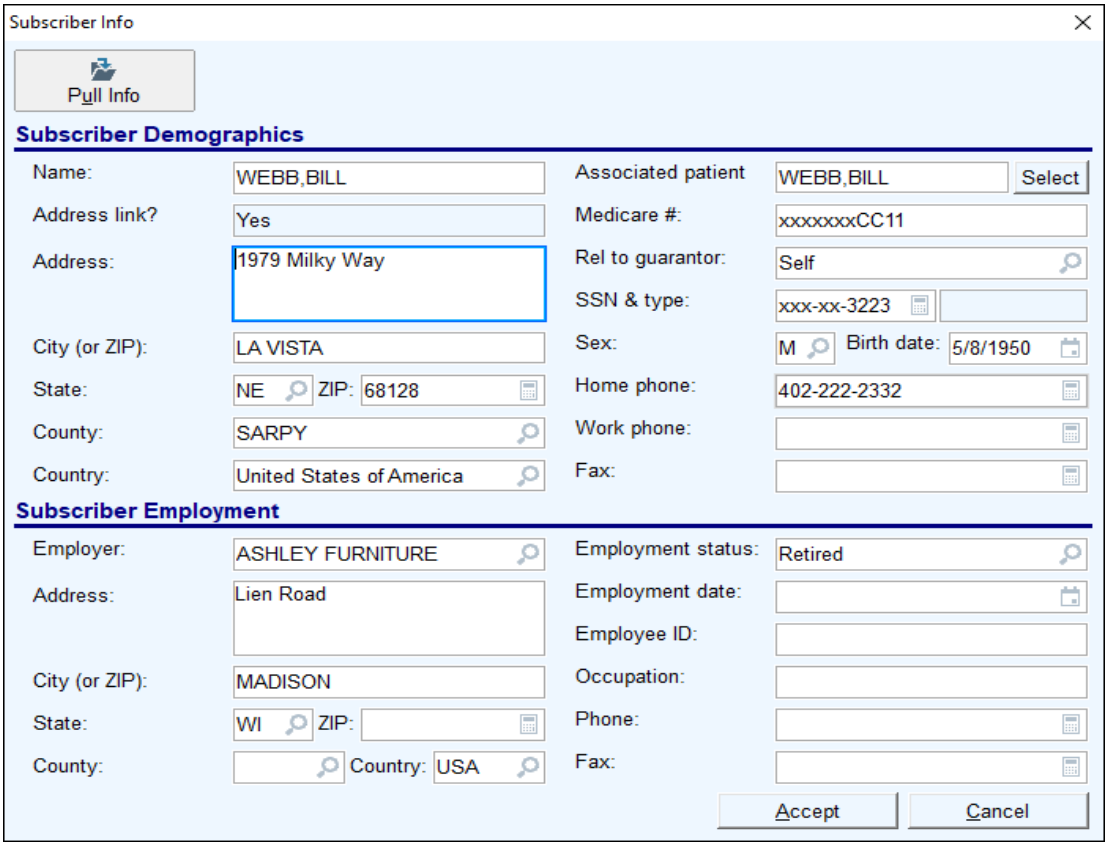
Automatically Pull a Patient's Coverage Info

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.



Advanced Beneficiary Notice

New Feature

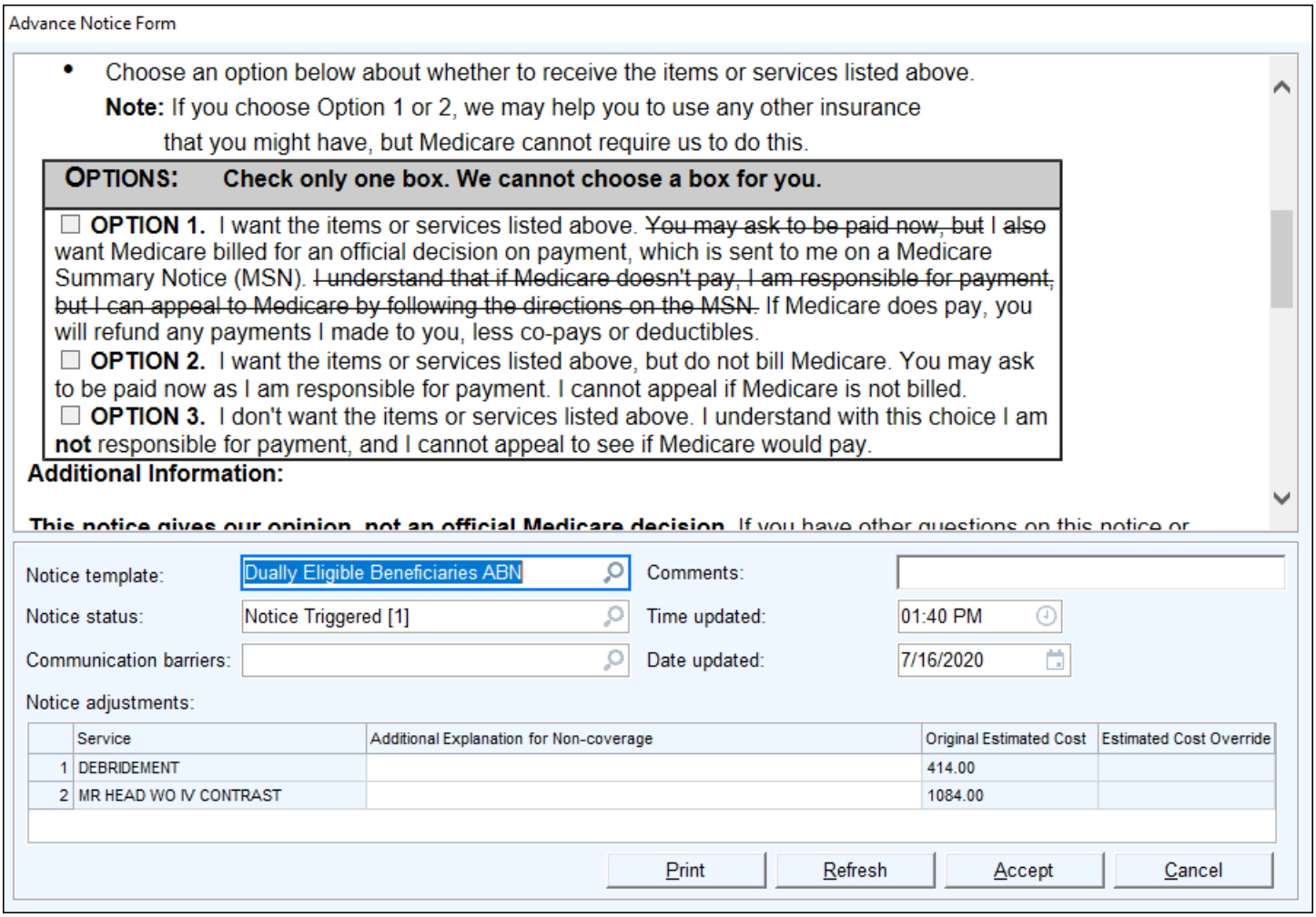
Dually Eligible Beneficiaries ABN Forms Appear Automatically

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.



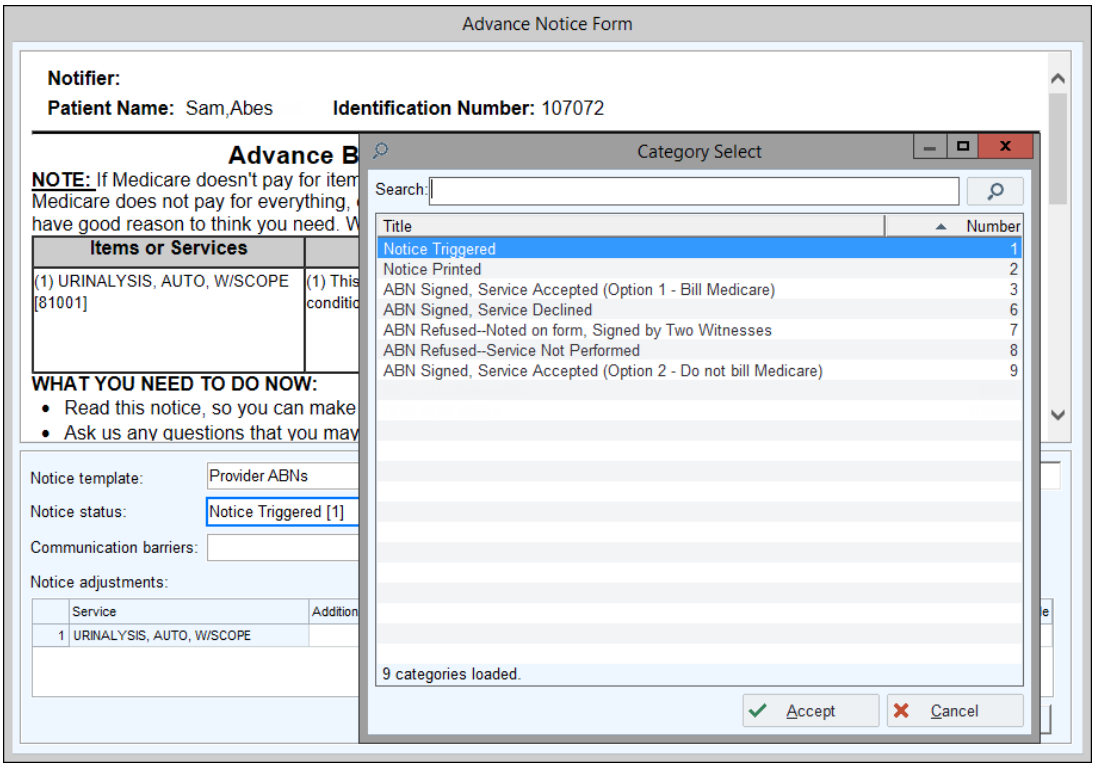
You Can No Longer Mark ABNs As Void

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

New Feature

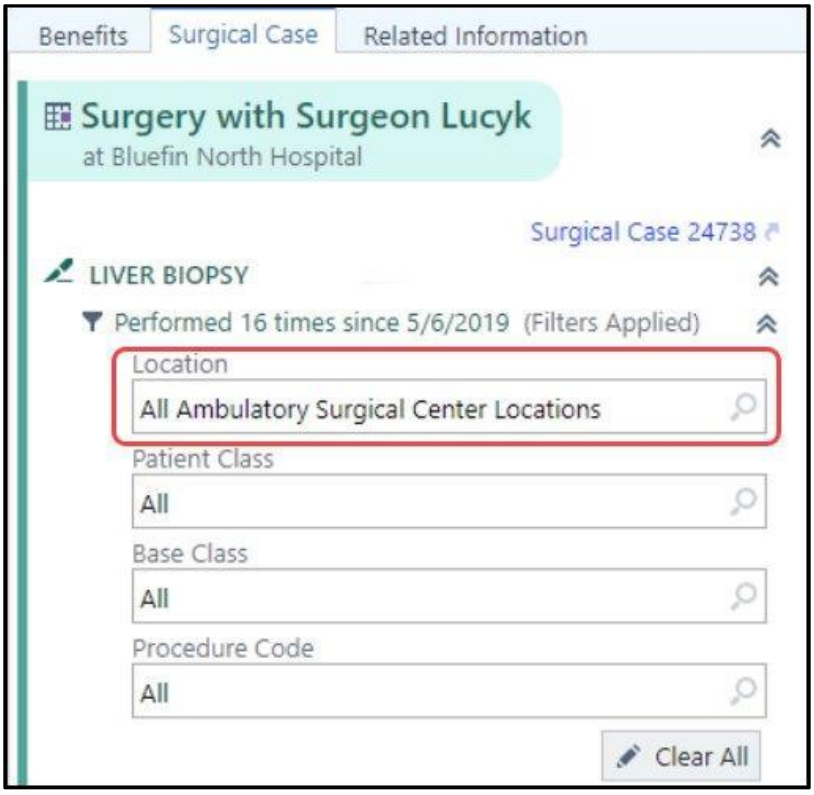
Surgical Estimates Now Calculated Based on History from Locations with Same Place of Service Type

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.



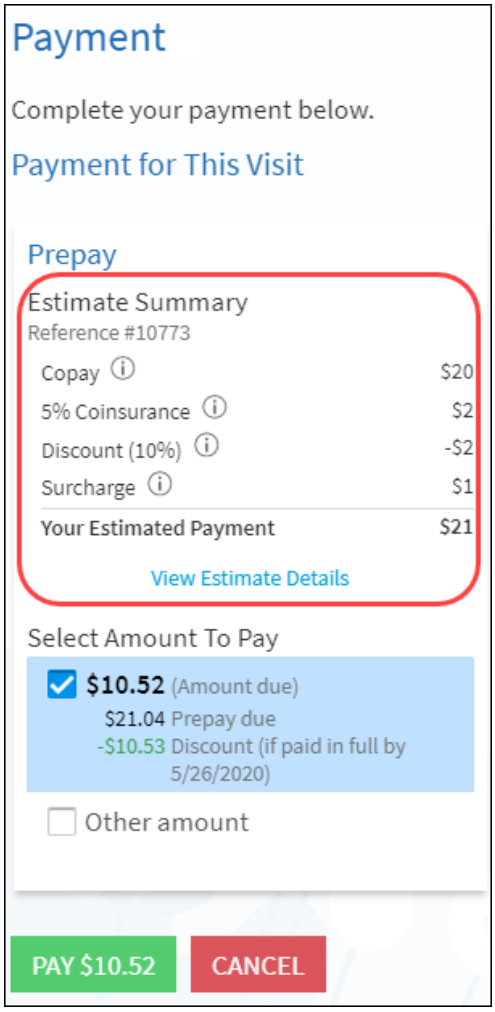
Estimate Information Appears to Guarantors During Prepay

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.



Cash Drawer

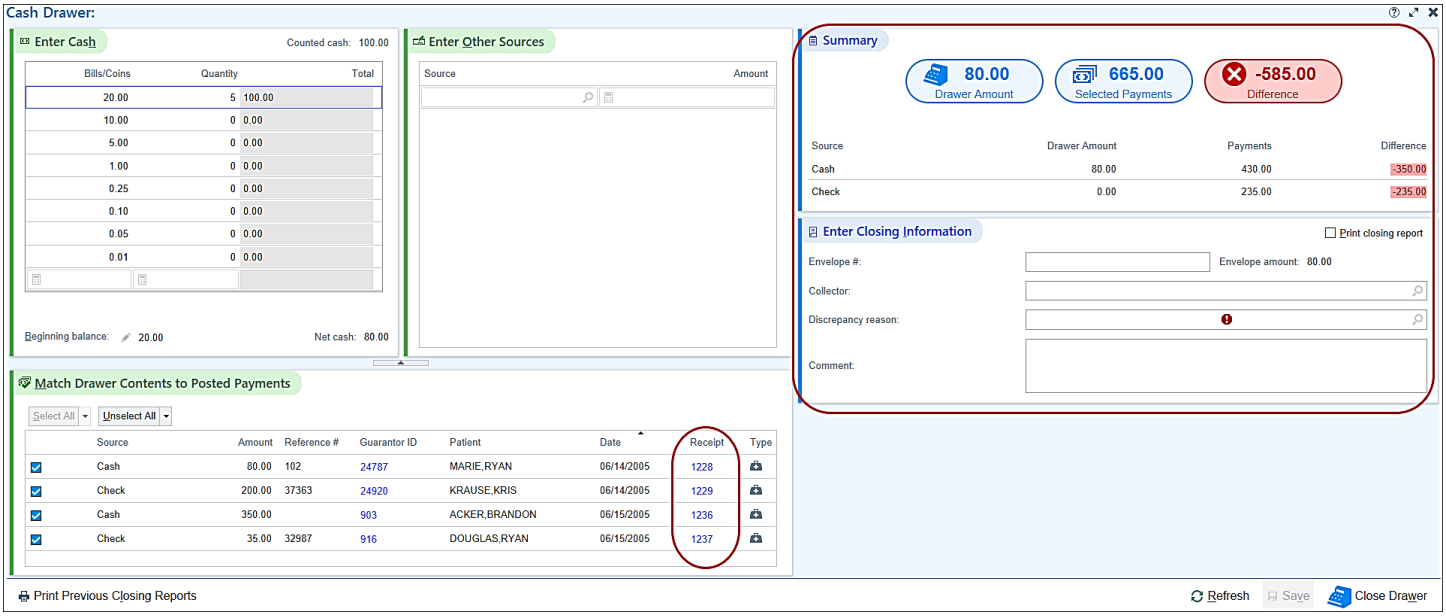
Quickly View Cash Drawer Summary and Receipts

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.



Claim Information

Fresh Look for Claim Info

Key Benefits:

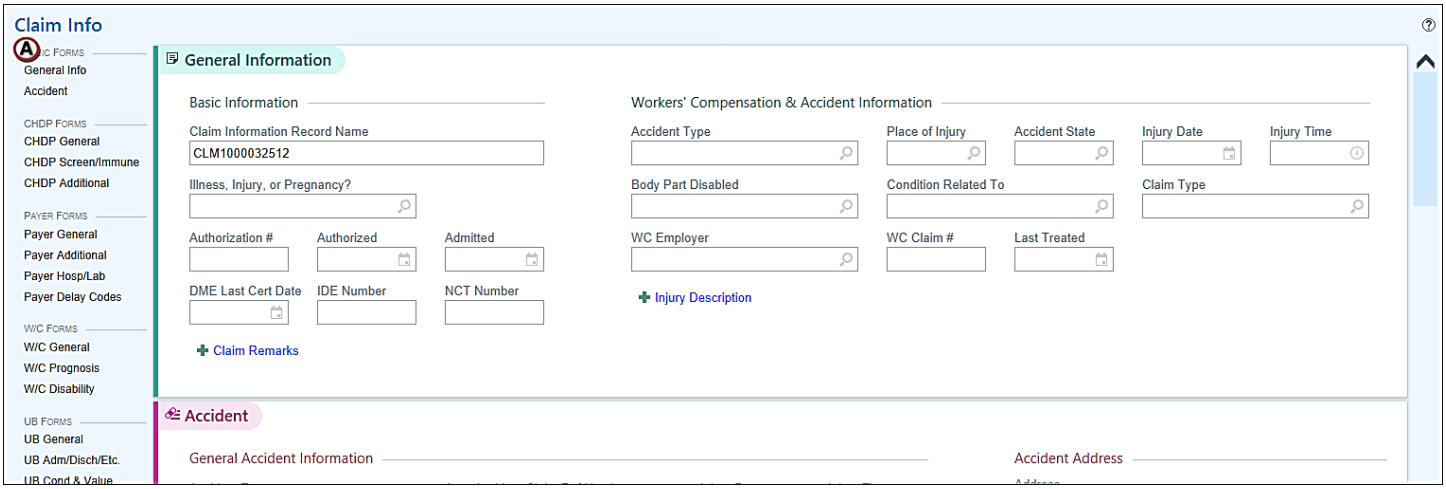
- Improved workflow

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

New Feature

Document More Information in Financial Assistance

Key Benefits:

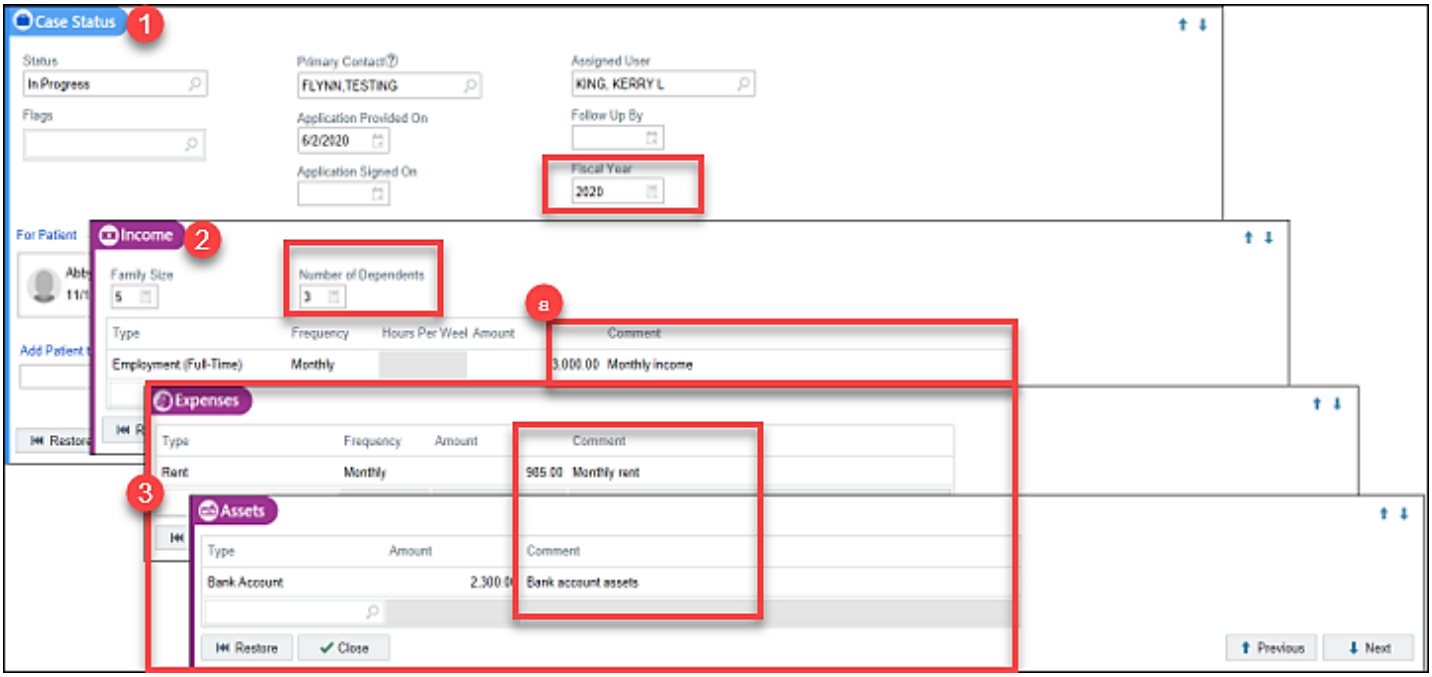
- Improved workflow

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.



More Effective Financial Assistance Trackers

Key Benefits:

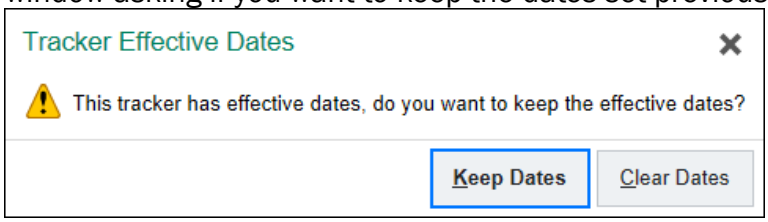
- More efficient

Description:

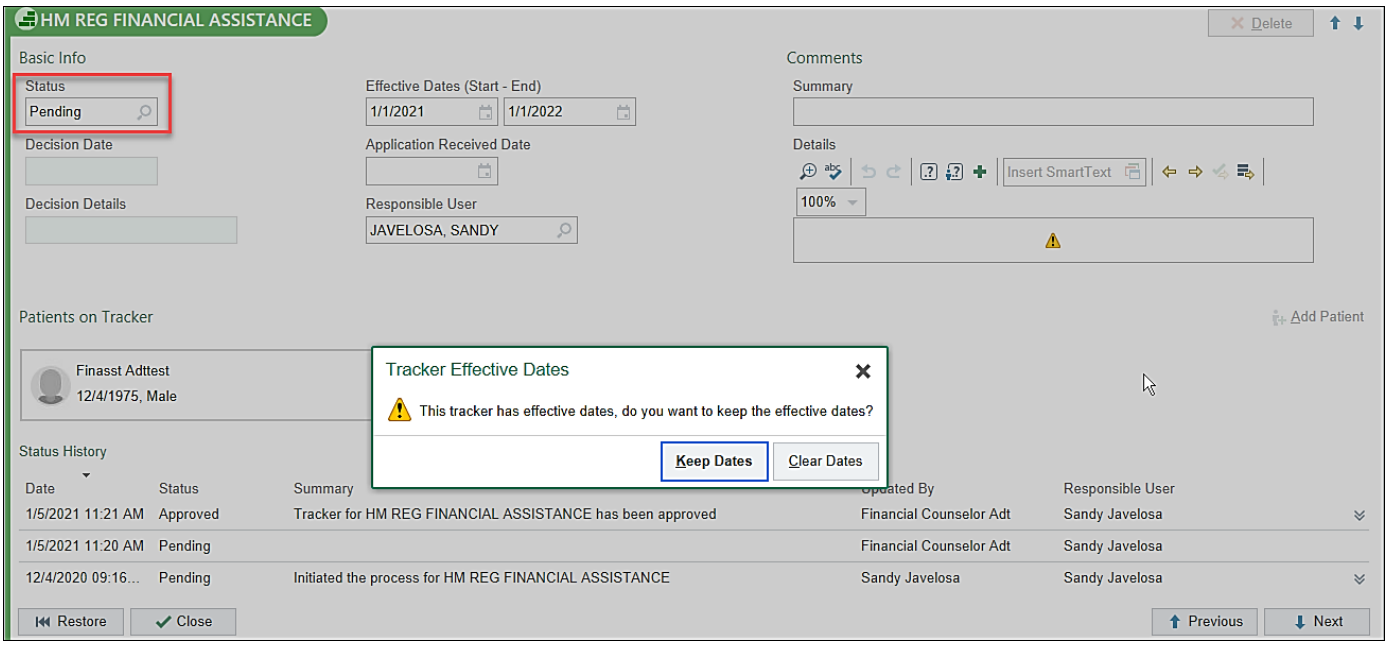
- If you know effective dates for a tracker before having it approved, you can now enter start and end dates while the tracker is still pending.
- If financial counselors know effective dates for a tracker before it's approved, they can now enter dates in the **Start Date** and **End Date** fields while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



Account Maintenance

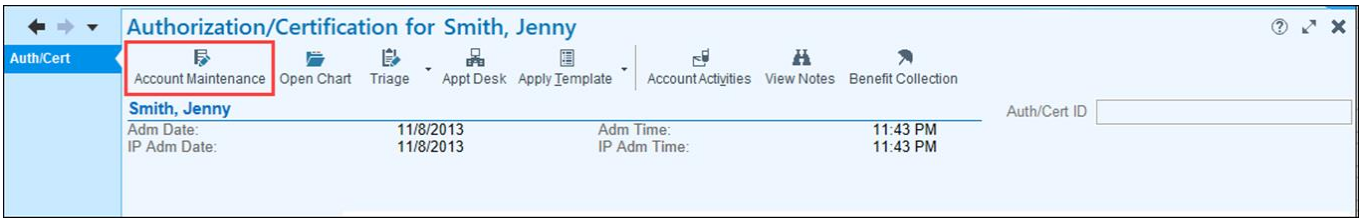
Account Maintenance Button in Auth/Cert Records Opens Encounter's Primary HB HAR

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:

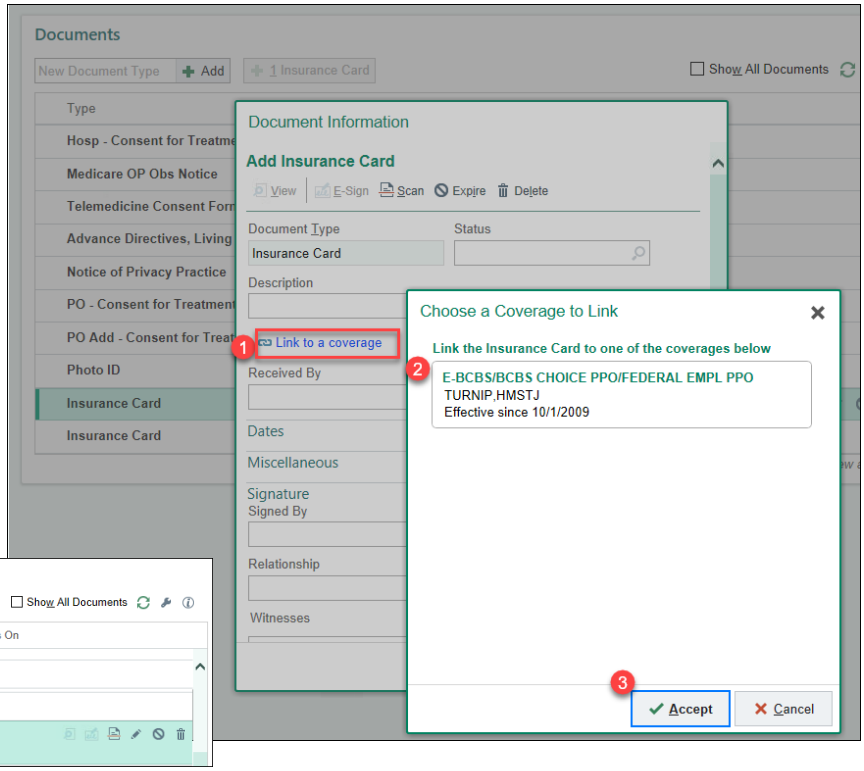
- Time saver

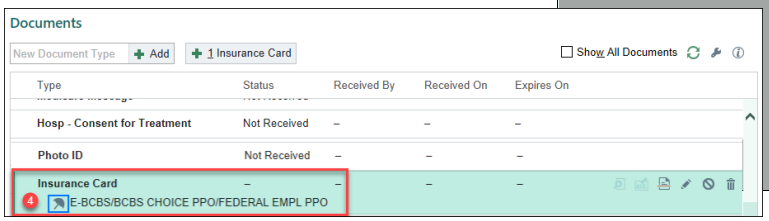
Description:

- 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.





Claim Edit Workqueues

Key Change

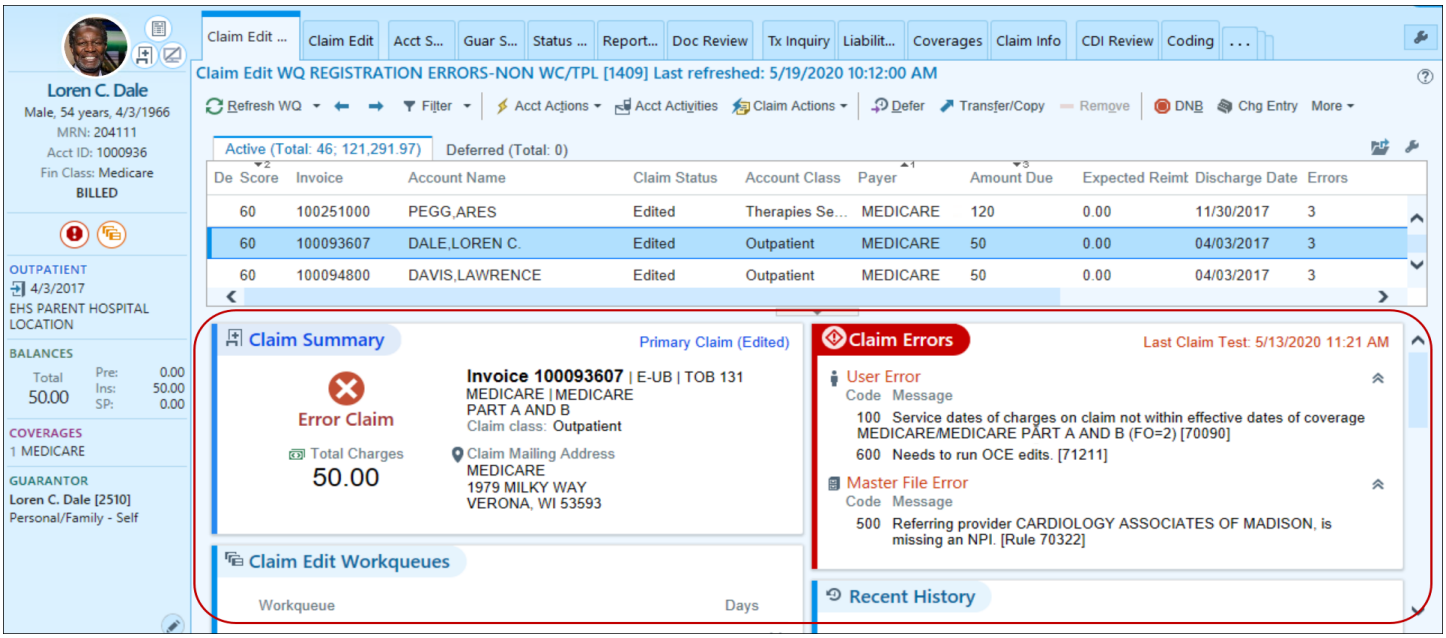
Navigate Updated Hospital Billing Claim Edit Workqueues

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.



New Look

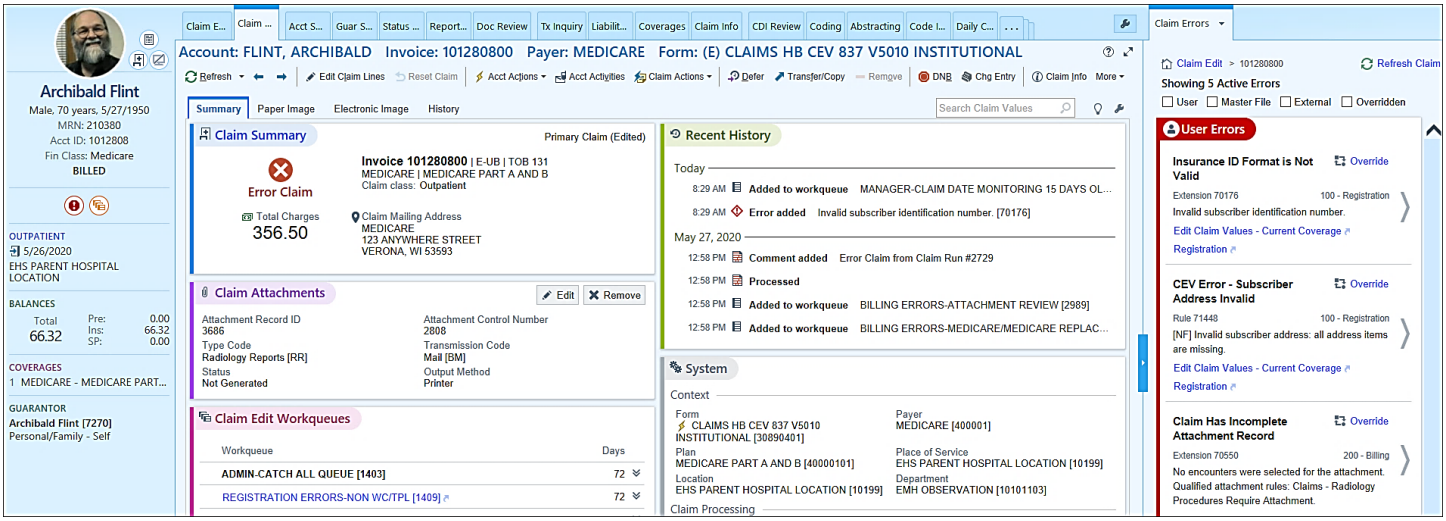
Fix Errors Faster with Redesigned Claim Edit Assistant

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.



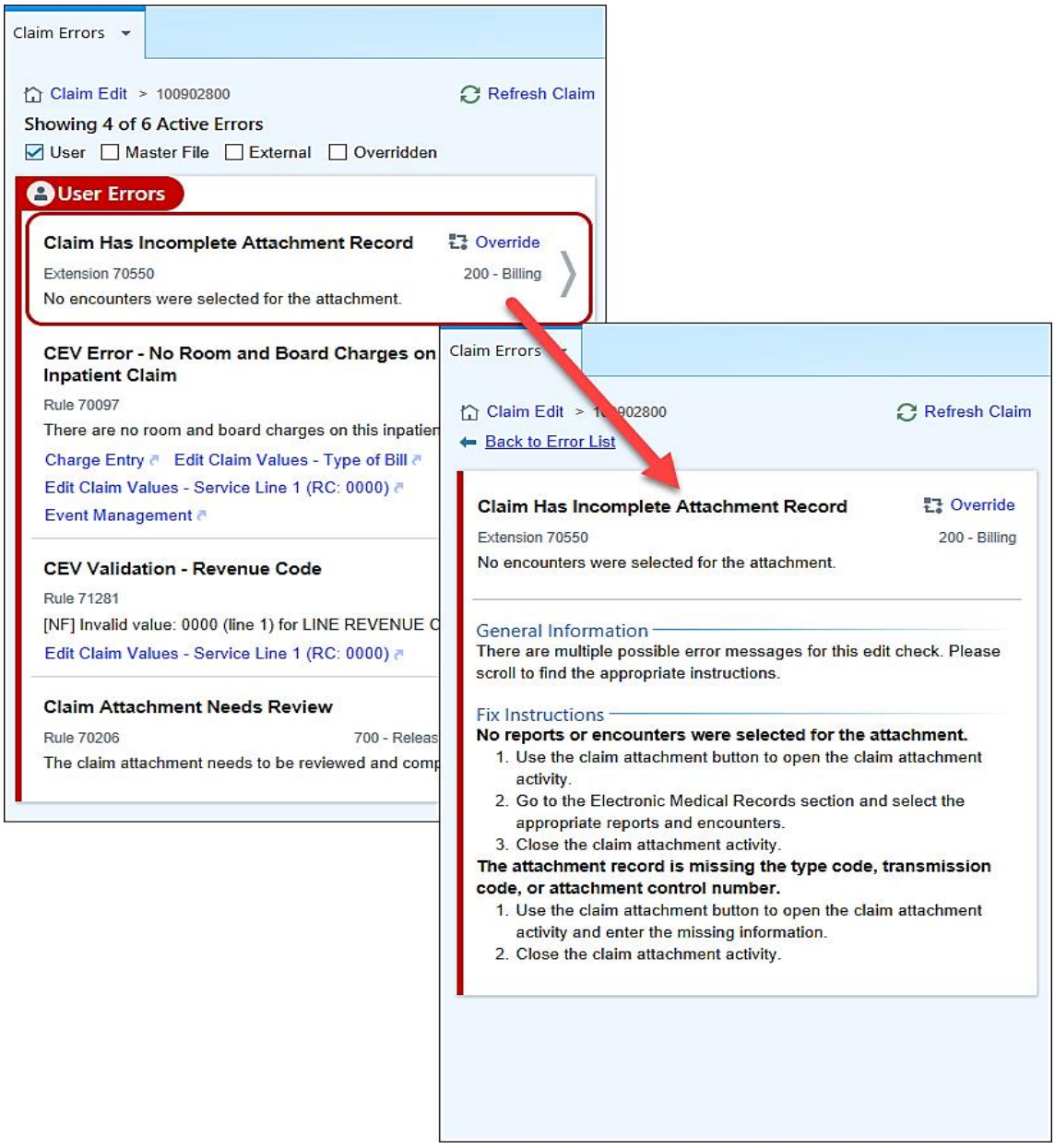
Find Fix Instructions in New Claim Edit Assistant Sidebar

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.**



Patient Station Updates

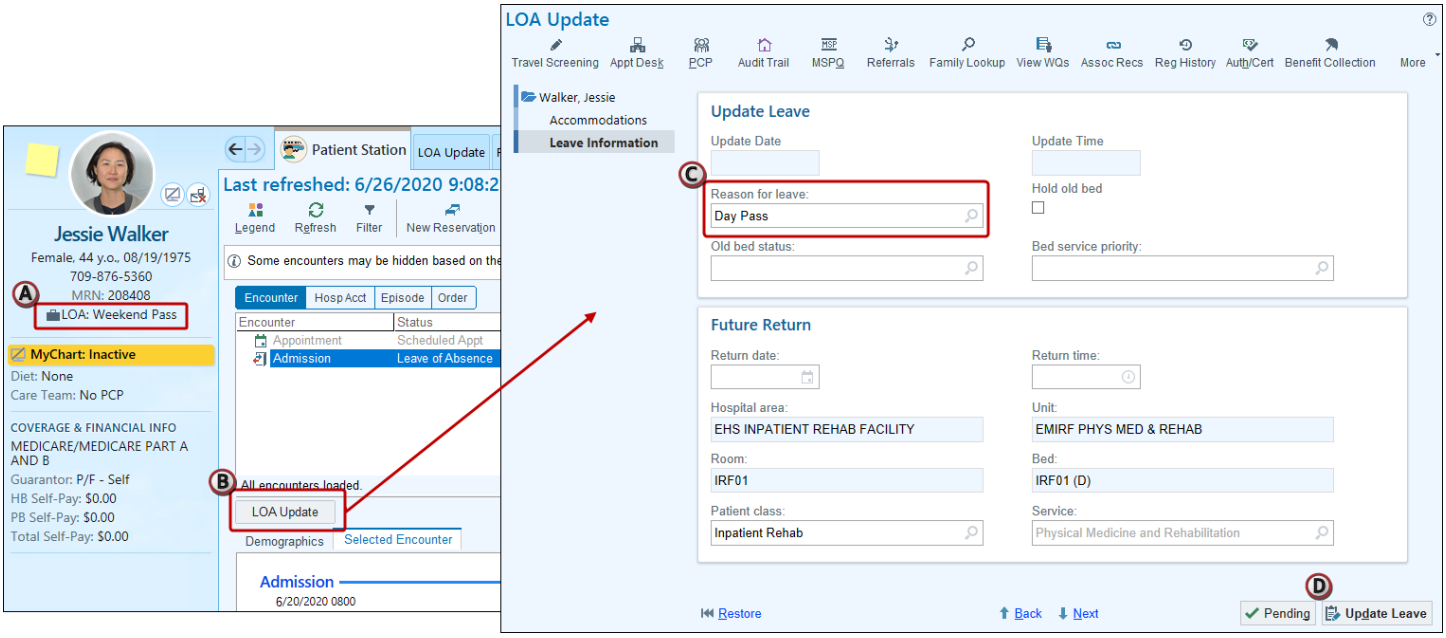
Update Leave of Absence

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

New Feature

Make Sure to Collect Patients' Primary Care Provider Addresses

Key Benefits:

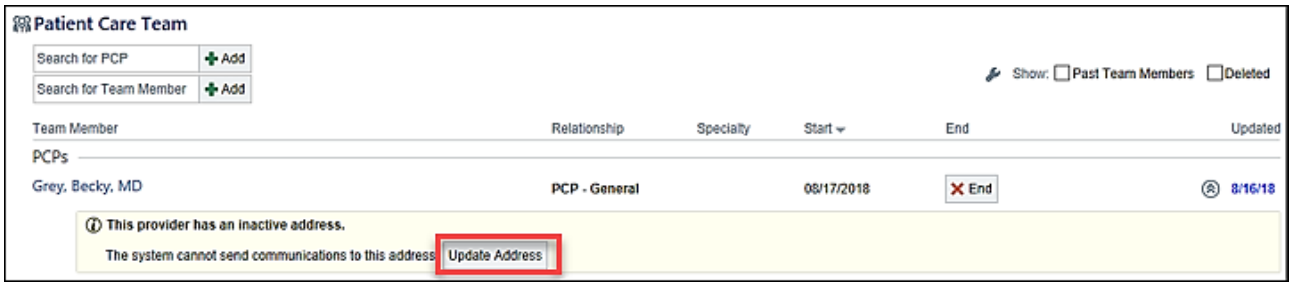
- Improved workflow

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.



Payment Plans

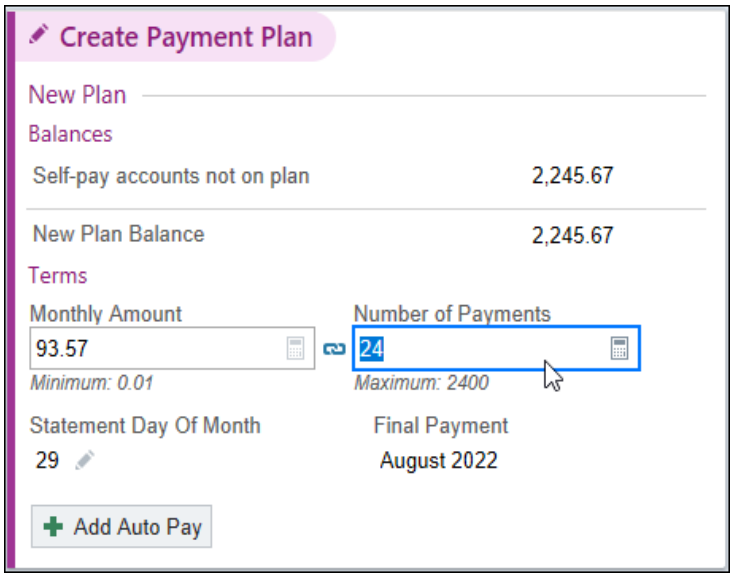
Easily Create Payment Plans from Enterprise Guarantor Summary

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.



Payment Distribution

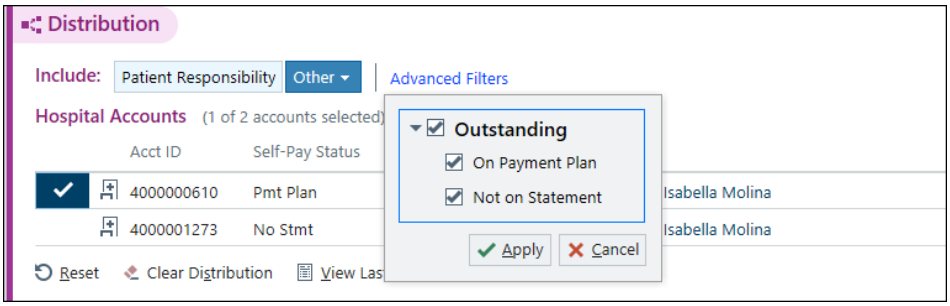
New Look, Simplified Workflow for Enterprise Self-Pay Payment Posting

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.



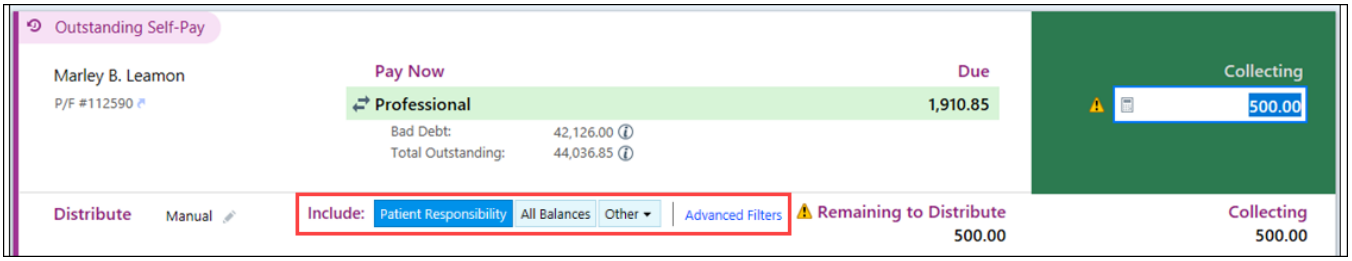
Use Quick Distribution Shortcuts in Payment Collection

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.



Unit Manager

New Feature

Select Columns to Print in Unit Manager

Key Benefits:

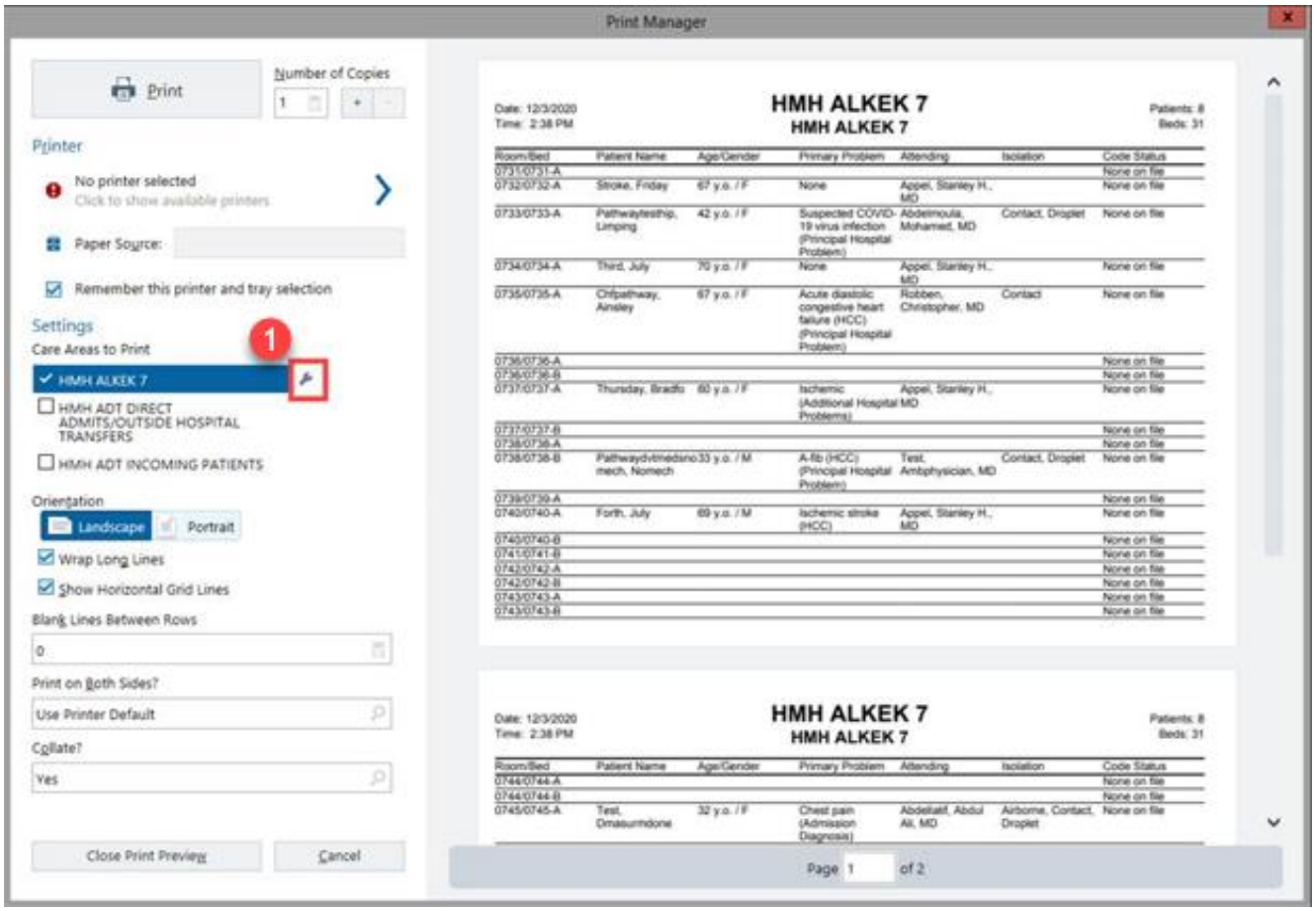
- Personalizing your workflow

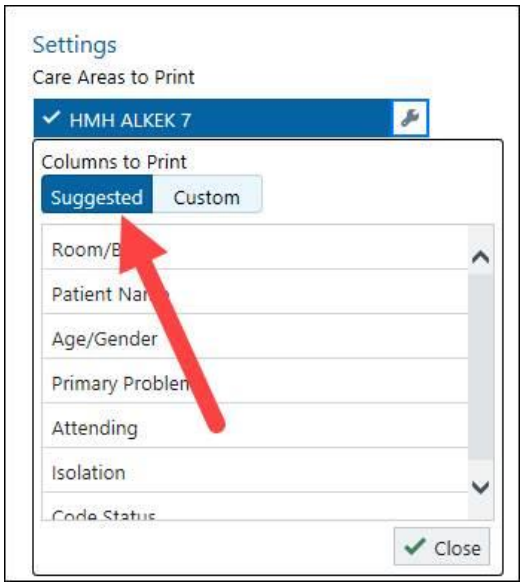
Description:

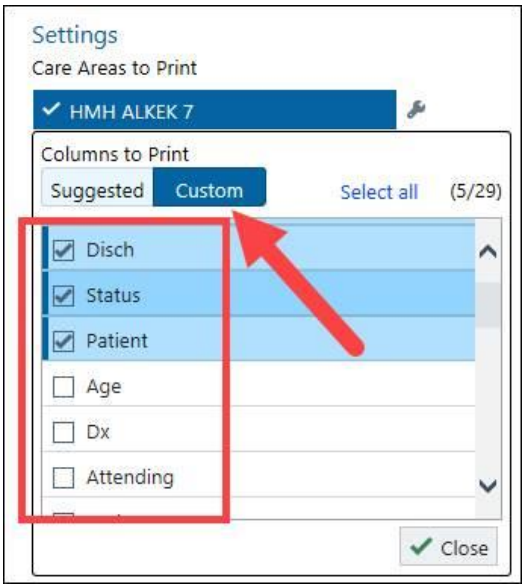
- When you print the **Unit Manager**, you can now choose the columns to print. Use suggested columns that match those used in **Patient Lists** printing, or select custom columns.

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.




Settings
Care Areas to Print
HMH ALKEK 7
Columns to Print
Suggested
Custom
Room/B
Patient Nar
Age/Gender
Primary Problem
Attending
Isolation
Code Status
Close


Settings
Care Areas to Print
HMH ALKEK 7
Columns to Print
Suggested
Custom
Select all
(5/29)
Disch
Status
Patient
Age
Dx
Attending
Close

Storyboard

Good to Know

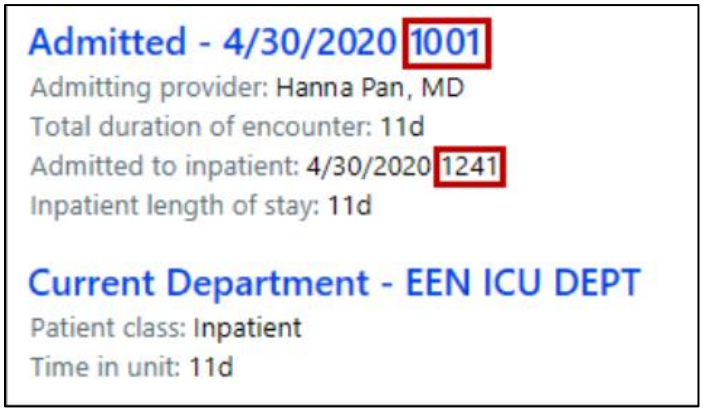
See Patient's Admission Time

Key Benefits:

- Time saver

Description:

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



New Feature

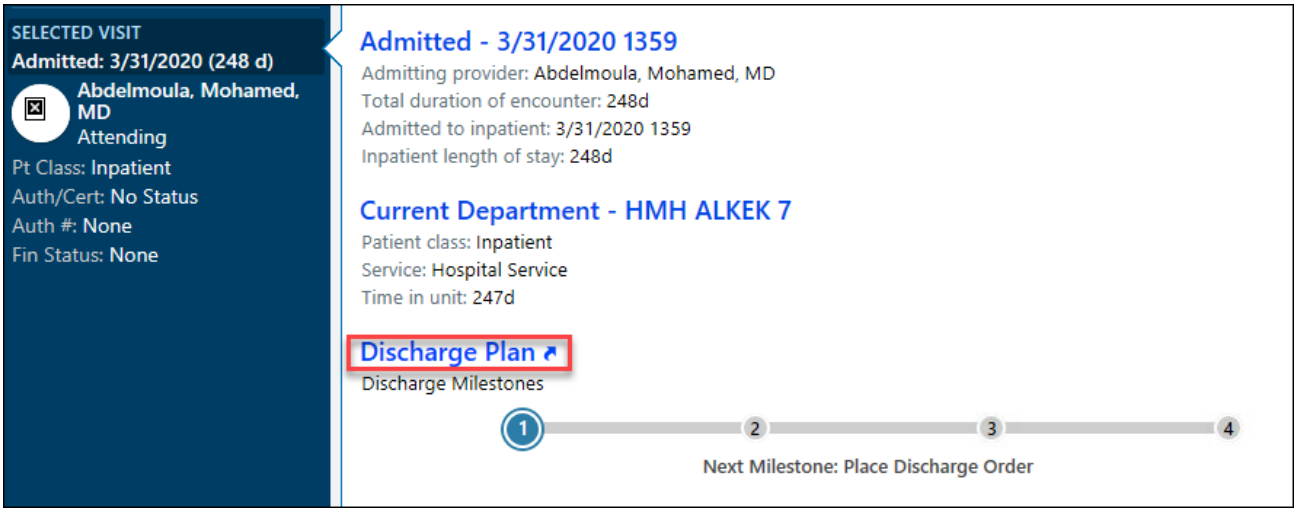
Access Discharge Information

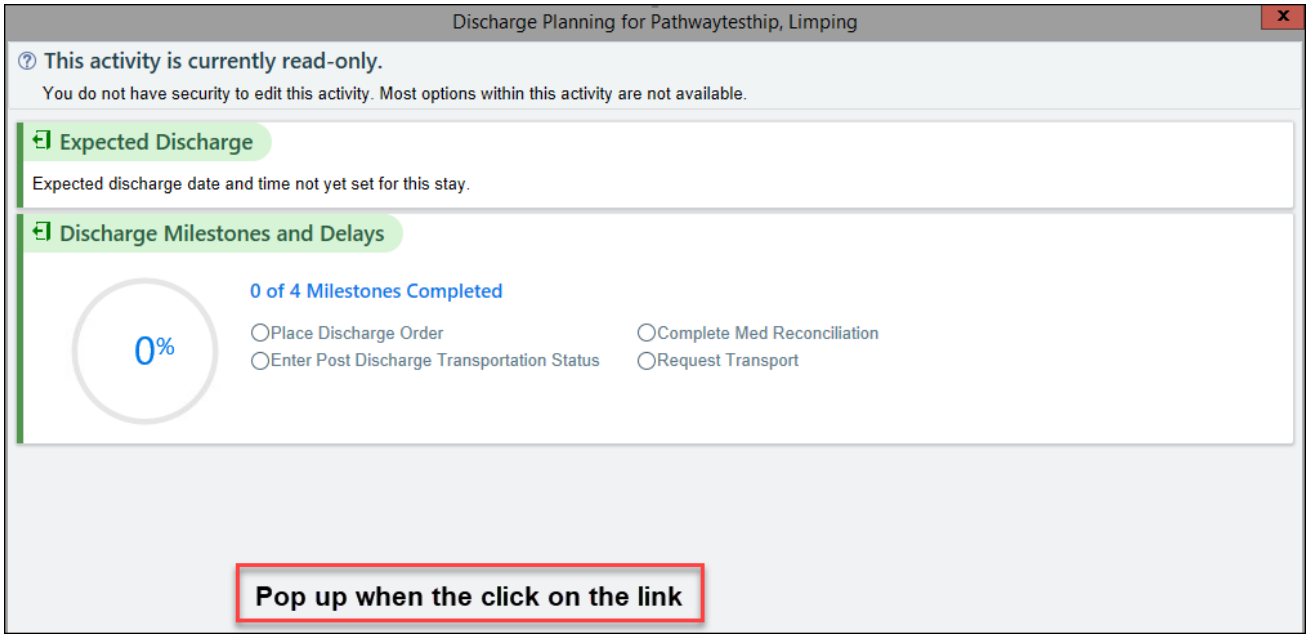
Key Benefits:

- Improved communication
- More efficient
- Time saver

Description:

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





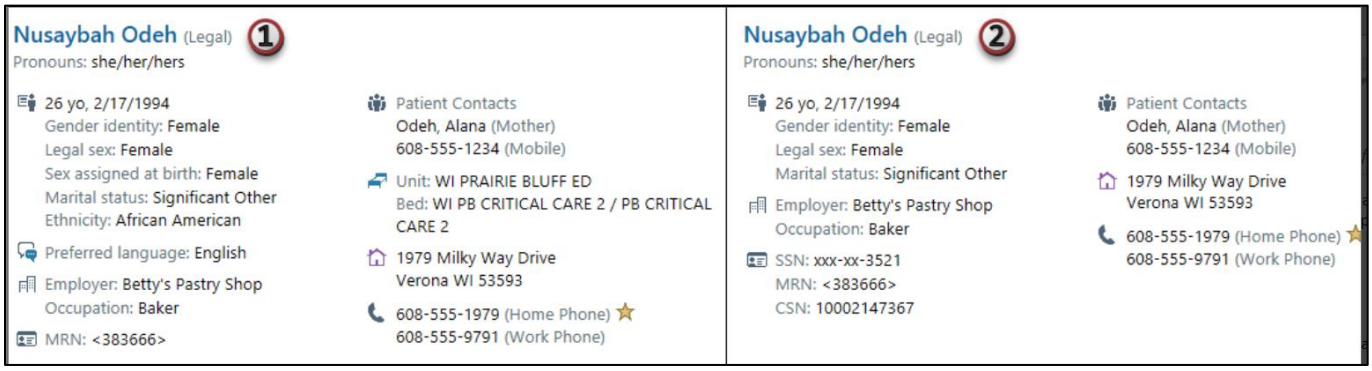
Hover to Discover New Demographics Information

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)



Hover Over Cooler Icon to View Transplant Episode List

Key Benefits:

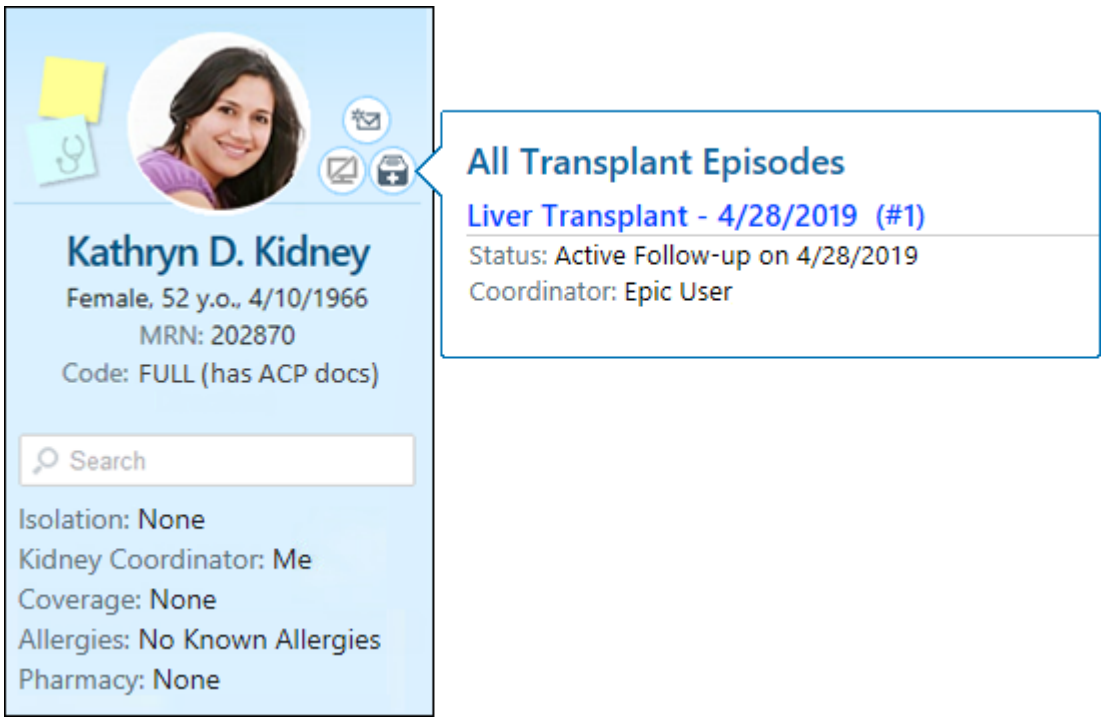
- Easily accessible

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.



Secure Chat

Set Favorites

Key Benefits:

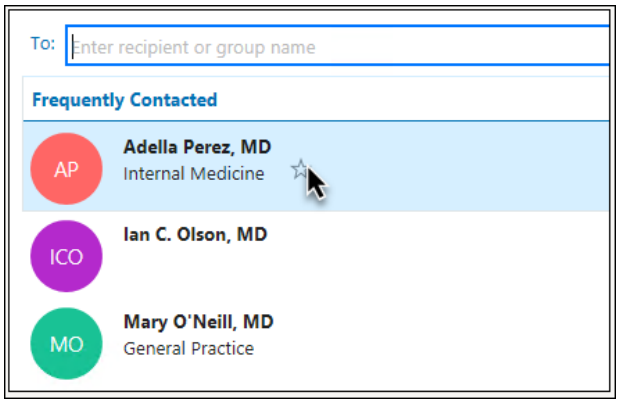
- Improved communication

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.



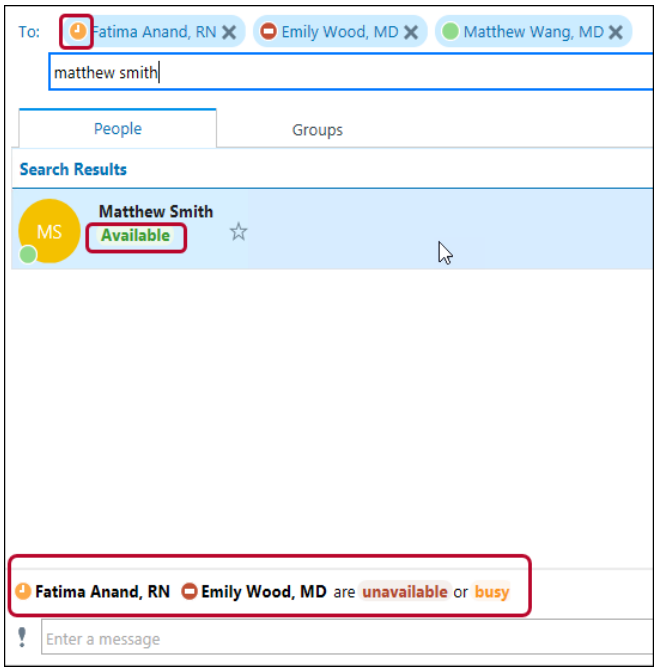
See More Clearly Whether a Colleague Is Available

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

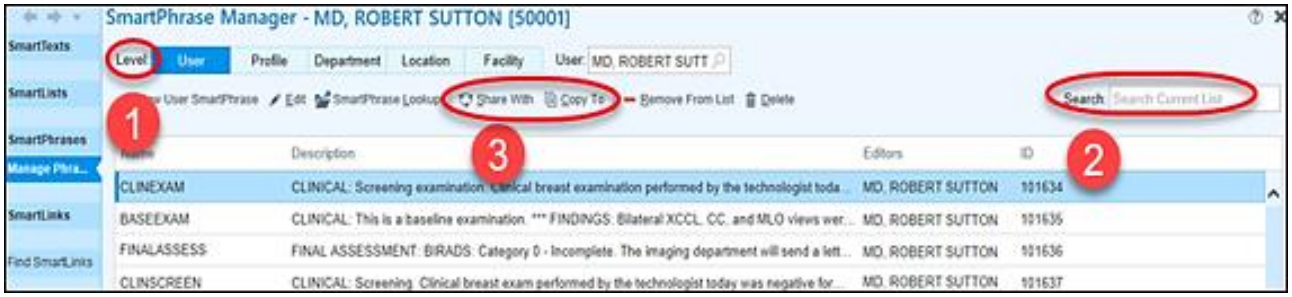
SmartPhrase Manager: New Look and Streamlined Workflow

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.



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:

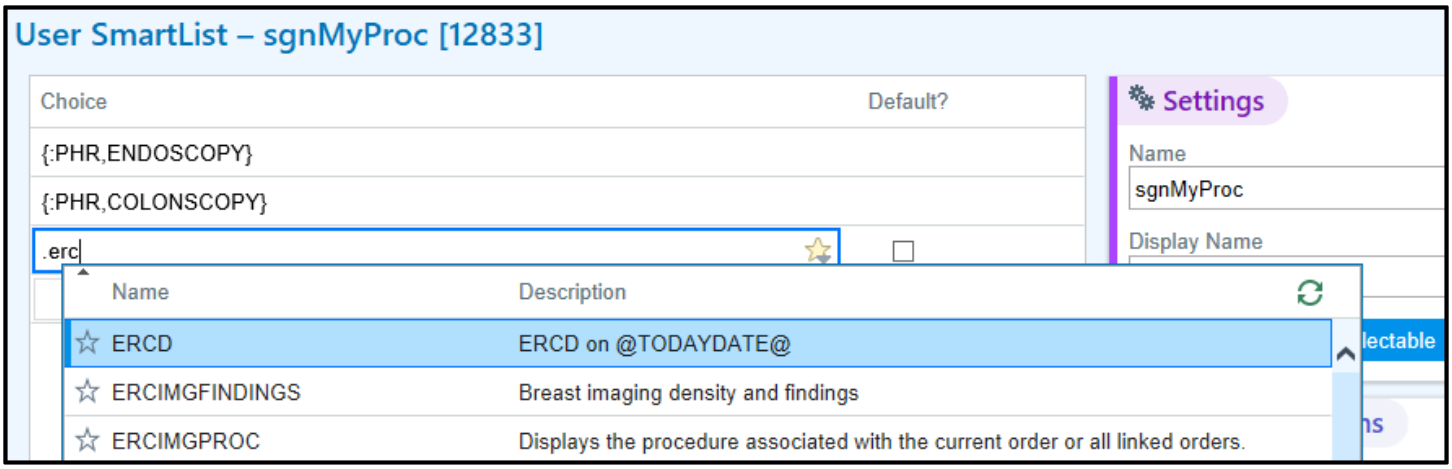
- Personalizing your workflow.

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**.



MyChart

MyChart's New Home Page

Key Benefits:

- Improved workflow
- More efficient

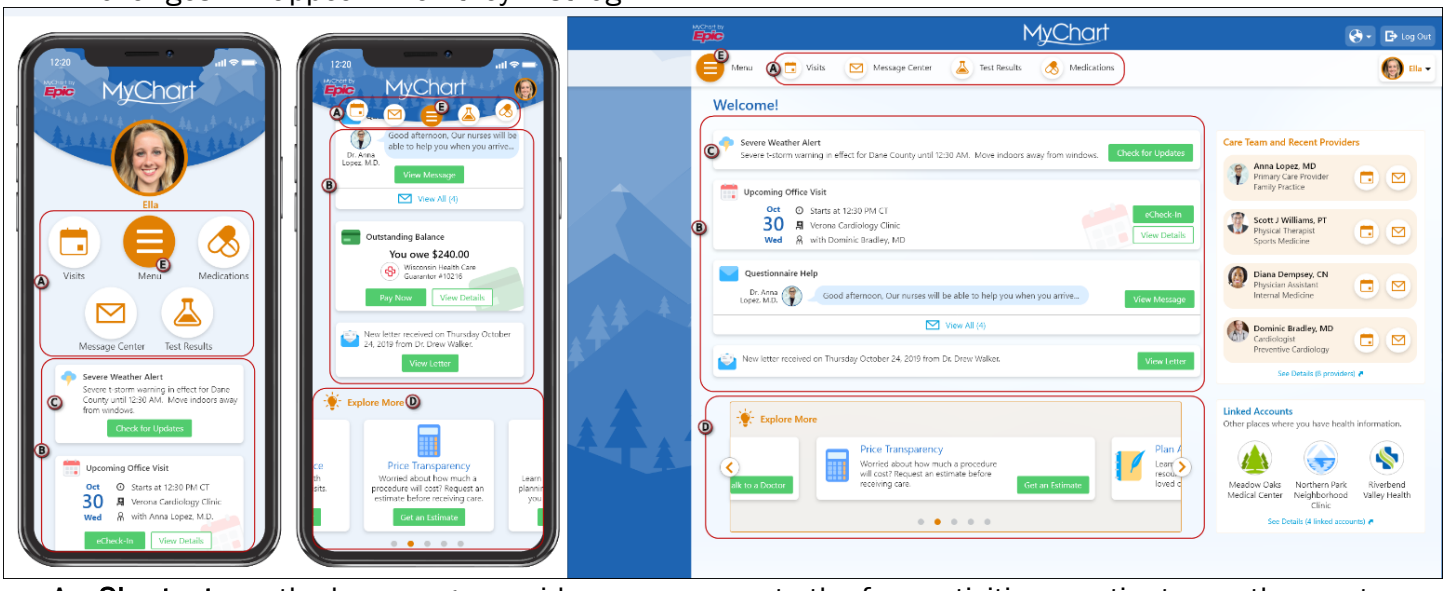
Key Benefits:

- Improved workflow
- More efficient

View the New **MyChart** Experience video.

Description:

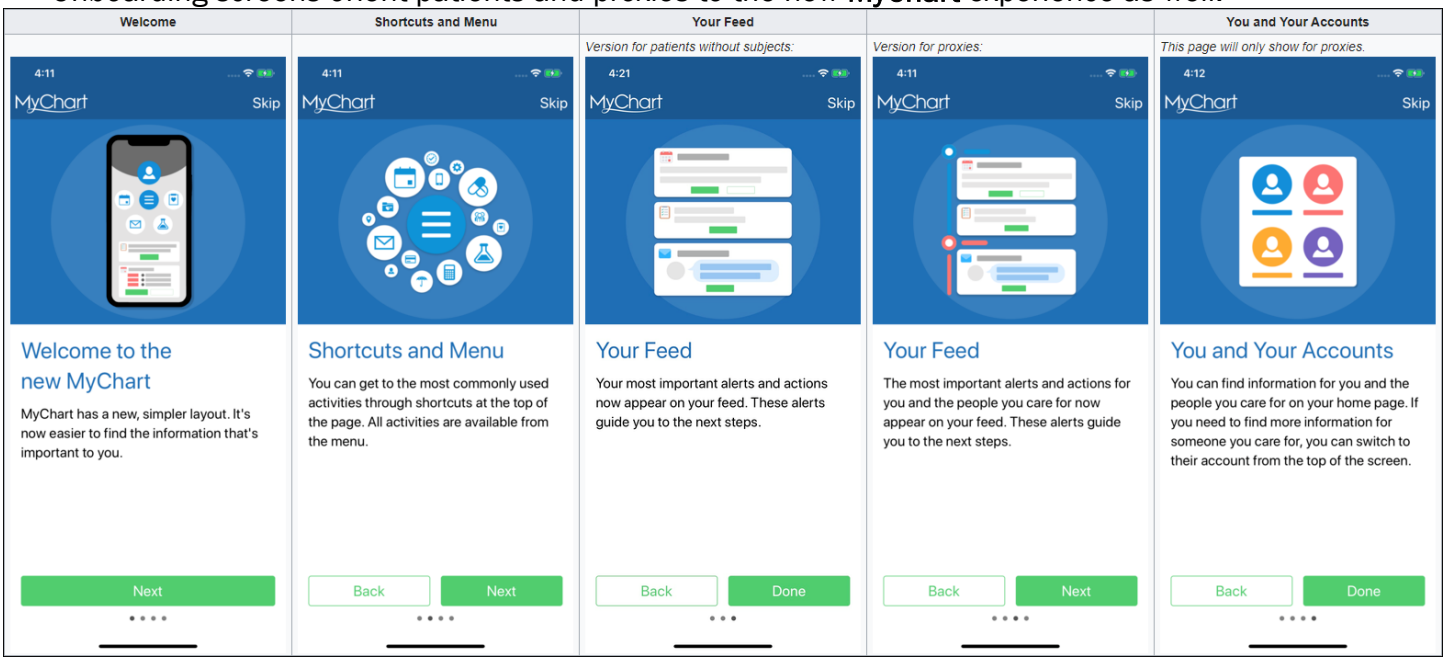
- The **MyChart** homepage and user experience is being redesigned to make it cleaner and easier to use. All features and functionality are available on both the web and mobile app platform. The new design provides shortcuts to common activities and an actionable list of updates the patient logs in.
- 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.



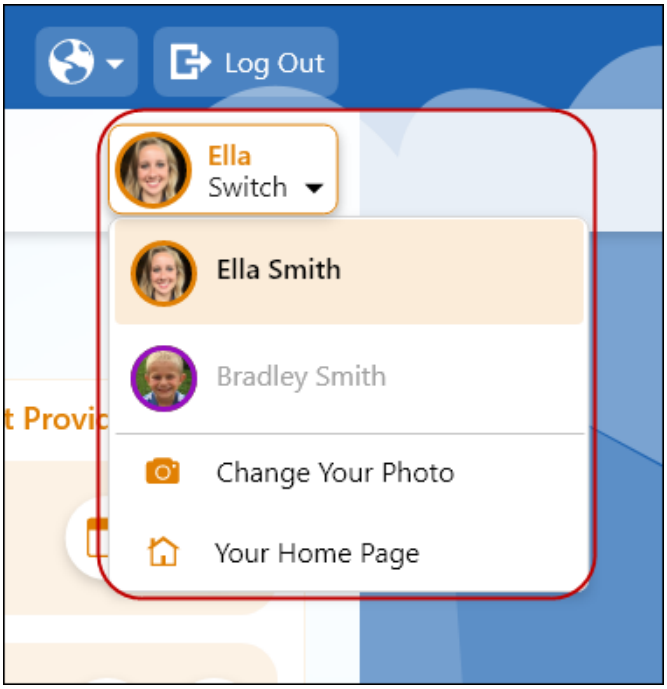
A. **Shortcuts** on the homepage provides easy access to the four activities a patient uses the most.
B. The **health feed** is a consolidated view of actionable health updates, including appointment reminders, check in tasks and messages from the patient's care team.
C. Information for proxies and the 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**.

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.



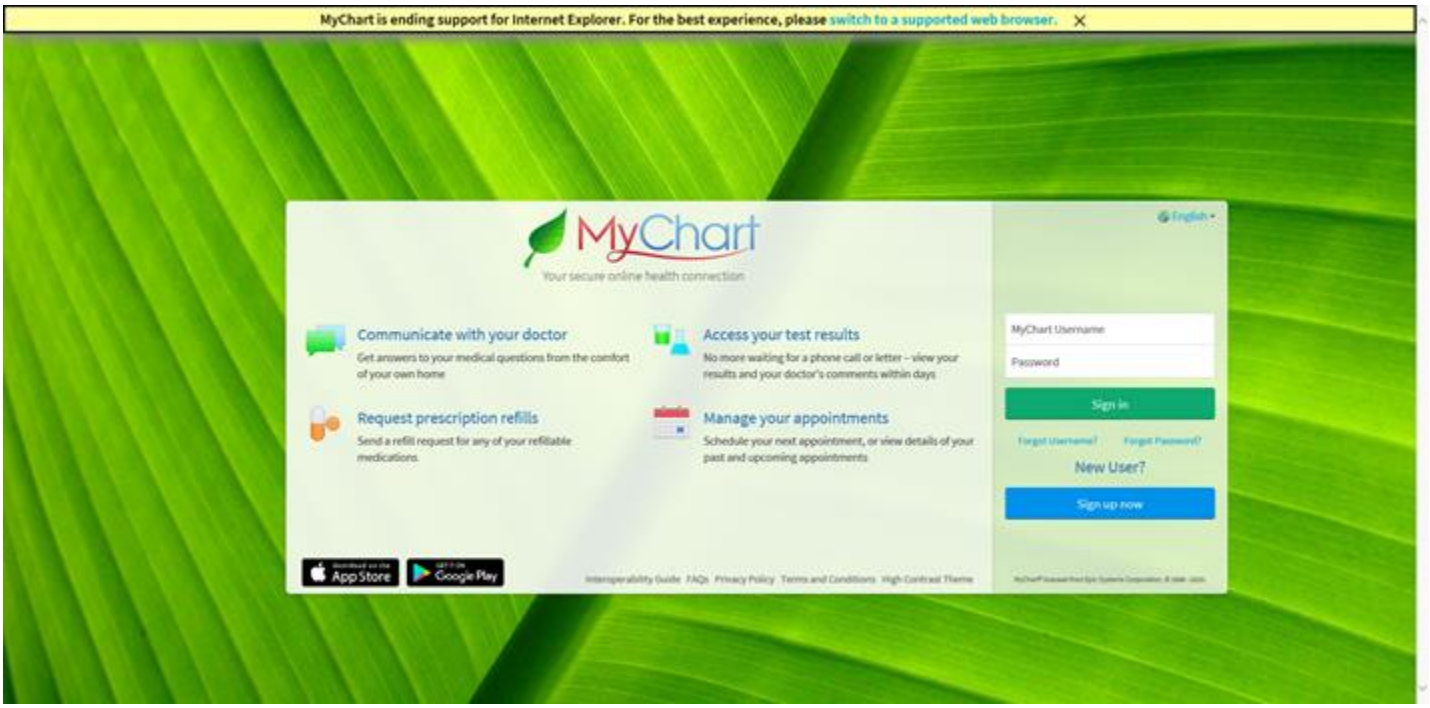
MyChart's New Home Page

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**.


MyChart is ending support for Internet Explorer. For the best experience, please switch to a supported web browser.
MyChart
Your secure online health connection
Communicate with your doctor
Get answers to your medical questions from the comfort of your own home
Access your test results
No more waiting for a phone call or letter – view your results and your doctor's comments within days
Request prescription refills
Send a refill request for any of your refillable medications
Manage your appointments
Schedule your next appointment, or view details of your past and upcoming appointments
App Store
Google Play
MyChart Username
Password
Sign in
New User?
Sign up now

Epic Updates

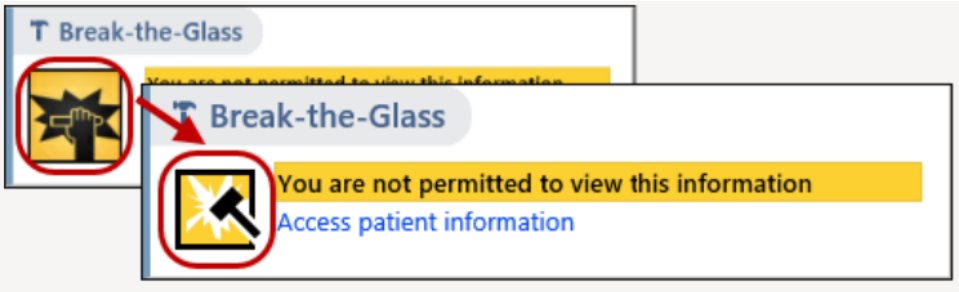
New Break-the-Glass Icon in Reports

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.



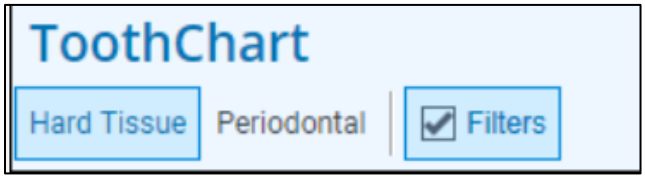
Easier to Tell When Toolbar Button Is Selected

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.

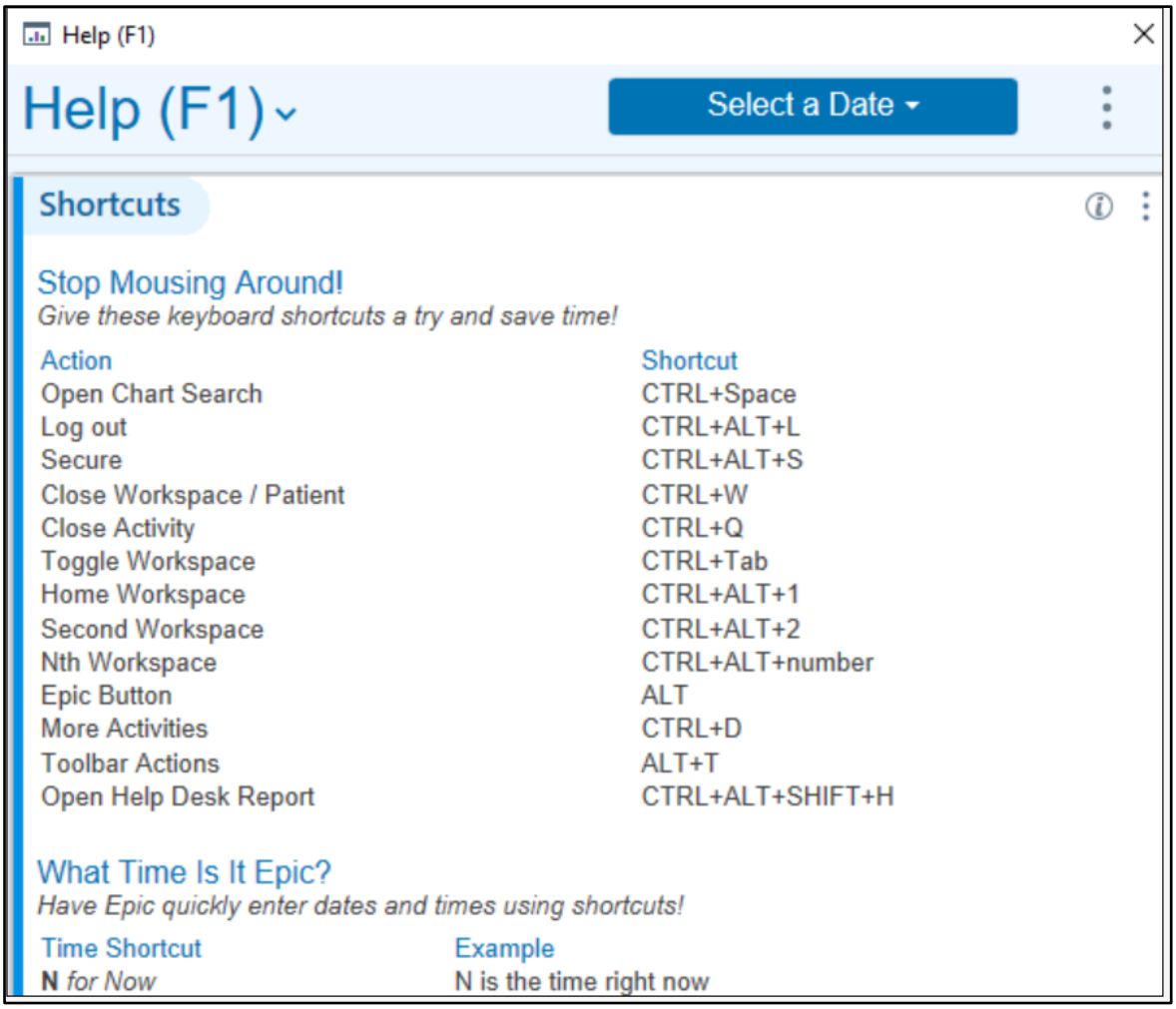
F1 Help Activity Name Change

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.