

# 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:

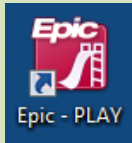
- Registration Staff
- Insurance Verification Staff
- Transfer Center Staff
- Management Staff

## 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

## Feb. 21 Epic Update Companion

**Today's Patients Report - HM TPR-All Patients**

Refresh Settings Appointments 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	
Addtest, 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...	12/28/83	F	
Chgt, Orregetesting	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 road  
HOUSTON TX 77030

Contact Info: 225-777-6666  
MyChart

Patient Contact: Doemij, Kkkk  
225-777-6666

**Current Encounter** HMW Hospital

**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 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.

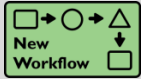
#### How to:

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.

The screenshot displays a consent form titled "Disclosure of Non-Covered Charges for Healthcare Coverage" and "Daily Journal/Care Plan". The form includes several signature capture boxes, each labeled "Capture Signature". A red box highlights the first signature box, which contains the text "Waiting for ...". A red box highlights the "Next" button in the "Topaz Signature Capture" window. A red box highlights the "Accept" button at the bottom of the form. A red box highlights the "Accept & Print" button at the bottom of the form.



## 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  Cancel Request  Patient Station  Encounter			
	<b>Pickard, Wesley</b> 21 yrs M (05/07/1999) MRN: BCA111 Pending Request #: 1648	<b>Referring Facility</b> Not yet determined Received: 6/25/2020 1:48 PM	<b>Target Facility</b> CENTRAL HOSPITAL
			 TC SOCIAL APPROVAL is next 1 of 4 approved





## Registration – Insurance Verification – Transfer Center Feb. 21 Epic Update Companion



### 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.

**Transfer Center (Read-only)**

63 4 0 0

**Pending Requests**

☐ My Requests

Group: No Grouping • Sort: Patient Name ▾

Patient Name	Age	Gender	Date of Birth	MRN	Request Type	Referring Facility	Referred by	Request #	Status
Appleton, Julie	49	F	06/27/1970	BCA10539	Inpatient Transfer	ST. CECILIA HOSPITAL	Michael Adams, MD	3357	Pending
Kuntzeiman, Nancy	30	F	08/26/1989		Inpatient Transfer	ST. CECILIA HOSPITAL	Michael Adams, MD		Pending
Larson, Annika	32	F	01/21/1988		Inpatient Transfer	ST. CECILIA HOSPITAL	Michael Adams, MD		Pending
Paschke, Tyler	28	M	12/01/1991		Inpatient Transfer	ST. CECILIA HOSPITAL	Michael Adams, MD		Pending
Thompson, Lisa	64	F	07/31/1955		Inpatient Transfer	ST. CECILIA HOSPITAL	Michael Adams, MD		Pending

**Appleton, Julie**  
49 yrs F (06/27/1970) MRN: BCA10539  
Request # 3357

Referring Facility: ST. CECILIA HOSPITAL  
Received: 5/22/2020 2:58 PM

Target Facility: Epic Hospital

Bed Ready? is next  
1 of 4 approved

**This activity is currently read-only.**  
Most options within this activity are not available.

Initial Information Location Selection Source Admission Transportation Info Transfer Info Clinical Information Docs Documents

**Initial Information**

Request Type: Inpatient Transfer  
Referring Facility: ST. CECILIA HOSPITAL  
Referred by: Michael Adams, MD  
MADISON, WI 53714

**Location Selection**

Possible Locations: Short List

Add New Location

Location Selected: Epic Hospital

Confirm Declined Physician Approval Bed Ready? Financial Clearance TC SOCIAL APPROVAL

**Source Admission**

**Contacts**

BA Brad Acker, MD  
897-5353  
Accepting Provider  
Declined Medicine  
Epic Hospital

LR Lauren Royce  
897-1514  
Accepting Provider  
Approved - Will Admit: Intensive Care  
Epic Hospital

MA Michael Adams, MD  
897-3329  
Referring Provider  
ST. CECILIA HOSPITAL

**History**

Lauren Royce 897-1514  
Approved Intensive Care  
After reviewing the case, Dr. Royce agreed to accept the patient. Estimated time of arrival is 5:30 PM.  
5/22/2020 3:58 PM





## 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

 Pull Info

**Subscriber Demographics**

Name:	WEBB,BILL	Associated patient:	WEBB,BILL	Select	
Address link?	Yes	Medicare #:	xxxxxxxxCC11		
Address:	1979 Milky Way	Rel to guarantor:	Self		
City (or ZIP):	LA VISTA	SSN & type:	xxx-xx-3223		
State:	NE	Sex:	M	Birth date:	5/8/1950
ZIP:	68128	Home phone:	402-222-2332		
County:	SARPY	Work phone:			
Country:	United States of America	Fax:			

**Subscriber Employment**

Employer:	ASHLEY FURNITURE	Employment status:	Retired
Address:	Lien Road	Employment date:	
City (or ZIP):	MADISON	Employee ID:	
State:	WI	Occupation:	
ZIP:		Phone:	
County:		Fax:	
Country:	USA		

Accept Cancel



## 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	

PrintRefreshAcceptCancel





## 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.

The screenshot shows the 'Advance Notice Form' window. At the top, it displays 'Notifier: Patient Name: Sam,Abes' and 'Identification Number: 107072'. Below this is a section titled 'Advance B' with a note: 'NOTE: If Medicare doesn't pay for item Medicare does not pay for everything, have good reason to think you need. W'. There is a table with two columns: 'Items or Services' and '(1) This condition'. The first row contains '(1) URINALYSIS, AUTO, W/SCOPE [81001]' and '(1) This condition'. Below the table is a section titled 'WHAT YOU NEED TO DO NOW:' with two bullet points: 'Read this notice, so you can make' and 'Ask us any questions that you may'. There are fields for 'Notice template:' (set to 'Provider ABNs'), 'Notice status:' (set to 'Notice Triggered [1]'), and 'Communication barriers:'. Below these are 'Notice adjustments:' with a table showing 'Service' and 'Addition' columns. The first row shows '1 URINALYSIS, AUTO, W/SCOPE'. A 'Category Select' dialog box is open over the form, showing a search bar and a list of categories. The list includes: 'Notice Triggered' (1), 'Notice Printed' (2), 'ABN Signed, Service Accepted (Option 1 - Bill Medicare)' (3), 'ABN Signed, Service Declined' (6), 'ABN Refused--Noted on form, Signed by Two Witnesses' (7), 'ABN Refused--Service Not Performed' (8), and 'ABN Signed, Service Accepted (Option 2 - Do not bill Medicare)' (9). At the bottom of the dialog box, it says '9 categories loaded.' and has 'Accept' and 'Cancel' buttons.

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

Service	Addition
1 URINALYSIS, AUTO, W/SCOPE	

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



## 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.

The screenshot displays the 'Surgical Case' tab in the Epic interface. The case is titled 'Surgery with Surgeon Lucyk at Bluefin North Hospital' with Surgical Case 24738. The procedure is 'LIVER BIOPSY', which has been performed 16 times since 5/6/2019. A red box highlights the 'Location' filter dropdown, which is currently set to 'All Ambulatory Surgical Center Locations'. Other filters shown include 'Patient Class' (All), 'Base Class' (All), and 'Procedure Code' (All). A 'Clear All' button is located at the bottom right of the filter section.





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

[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**

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	



## 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.

**Claim Info**

**Table of Contents (A):**

- General Info
- Accident
- CHDP FORMS
  - CHDP General
  - CHDP Screen/Immune
  - CHDP Additional
- PAYER FORMS
  - Payer General
  - Payer Additional
  - Payer Hosp/Lab
  - Payer Delay Codes
- W/C FORMS
  - W/C General
  - W/C Prognosis
  - W/C Disability
- UB FORMS
  - UB General
  - UB Adm/Disch/Etc.
  - UB Cond & Value

**General Information**

**Basic Information**

Claim Information Record Name: CLM1000032512

Illness, Injury, or Pregnancy?

Authorization #, Authorized, Admitted, DME Last Cert Date, IDE Number, NCT Number

**Workers' Compensation & Accident Information**

Accident Type, Place of Injury, Accident State, Injury Date, Injury Time, Body Part Disabled, Condition Related To, Claim Type, WC Employer, WC Claim #, Last Treated

[+ Injury Description](#)

[+ Claim Remarks](#)

**Accident**

General Accident Information, Accident Address





## Financial Assistance



### Document More Information in Financial Assistance

#### Key Benefits:

- Improved workflow

#### Description:

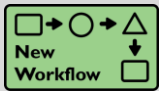
- You can now document the fiscal year, number of dependents and comments in the **Case Status**, **Income**, **Expenses** and **Assets** sections in a patient's **Financial Assistance** case.

#### 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 displays the Financial Assistance tracker interface. The **Case Status** section (1) includes fields for Status (In Progress), 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) and Number of Dependents (3). The **Expenses** section (3) includes a table with columns for Type, Frequency, Amount, and Comment, with an entry for Rent (Monthly, 985.00, Monthly rent). The **Assets** section (4) includes a table with columns for Type, Amount, and Comment, with an entry for Bank Account (2,300.00, Bank account assets). Red boxes highlight the Fiscal Year field in Case Status, the Number of Dependents field in Income, and the Comment fields in Expenses and Assets.





## More Effective Financial Assistance Trackers

### Key Benefits:

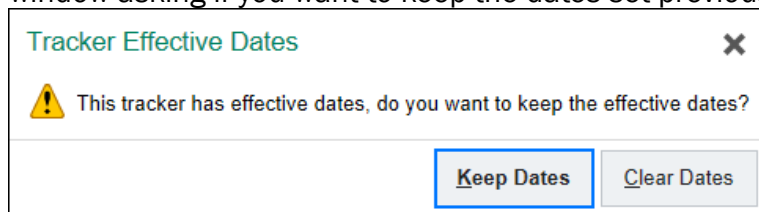
- More efficient

### 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.

The screenshot shows the "HM REG FINANCIAL ASSISTANCE" form in Epic. The "Status" dropdown is set to "Pending" and is highlighted with a red box. The "Effective Dates (Start - End)" are set to "1/1/2021" and "1/1/2022". The "Responsible User" is "JAVELOSA, SANDY". A "Tracker Effective Dates" dialog box is overlaid on the form, asking if the user wants to keep the effective dates. The dialog box has "Keep Dates" and "Clear Dates" buttons. The "Status History" table at the bottom shows the tracker's history, including its transition from "Approved" to "Pending".

Date	Status	Summary	Updated By	Responsible User
1/5/2021 11:21 AM	Approved	Tracker for HM REG FINANCIAL ASSISTANCE has been approved	Financial Counselor Adt	Sandy Javelosa
1/5/2021 11:20 AM	Pending		Financial Counselor Adt	Sandy Javelosa
12/4/2020 09:16...	Pending	Initiated the process for HM REG FINANCIAL ASSISTANCE	Sandy Javelosa	Sandy Javelosa



## 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.

Authorization/Certification for Smith, Jenny

Auth/Cert

Account Maintenance Open Chart Triage Appt Desk Apply Template Account Activities View Notes Benefit Collection

Smith, Jenny

Adm Date: 11/8/2013 Adm Time: 11:43 PM  
IP Adm Date: 11/8/2013 IP Adm Time: 11:43 PM

Auth/Cert ID



## 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.

The screenshot illustrates the 'Link to a coverage' workflow in the Epic Documents interface. The main window shows a list of documents. A 'Document Information' window is open for an 'Insurance Card'. A 'Choose a Coverage to Link' dialog box is displayed, showing a list of coverages. The 'Accept' button is highlighted.

**Documents**

New Document Type + Add + 1 Insurance Card ☐ Show All Documents

Type	Status	Received By	Received On	Expires On
Hosp - Consent for Treatment	Not Received	-	-	-
Photo ID	Not Received	-	-	-
Insurance Card	-	-	-	-
Insurance Card	-	-	-	-

**Document Information**

**Add Insurance Card**

View E-Sign Scan Expire Delete

Document Type Insurance Card Status

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.

The screenshot displays the Epic Claim Edit Workqueue interface. On the left, a sidebar shows patient information for Loren C. Dale, including MRN, account ID, and insurance status. The main area features a navigation bar with tabs like Claim Edit, Acct S..., Guar S..., Status..., Report..., Doc Review, Tx Inquiry, Liabilit..., Coverages, Claim Info, CDI Review, and Coding. Below this, a table lists active claims with columns for De Score, Invoice, Account Name, Claim Status, Account Class, Payer, Amount Due, Expected Reimt, Discharge Date, and Errors. The detailed view at the bottom is divided into three sections: Claim Summary, Claim Errors, and Claim Edit Workqueues. The Claim Summary section shows an 'Error Claim' for invoice 100093607 with a total charge of 50.00. The Claim Errors section lists two errors: a 'User Error' related to service dates and a 'Master File Error' related to a missing NPI. The Claim Edit Workqueues section shows a table with columns for Workqueue and Days.

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 Mailing Address: MEDICARE, 1979 MILKY WAY, VERONA, WI 53593

#### Claim Errors

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

**User Error**

Code: 100

Message: Service dates of charges on claim not within effective dates of coverage MEDICAREMEDICARE PART A AND B (FO=2) [70090]

Code: 600

Message: Needs to run OCE edits. [71211]

**Master File Error**

Code: 500

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

#### Claim Edit Workqueues

Workqueue	Days



# Registration – Insurance Verification – Transfer Center

## Feb. 21 Epic Update Companion



## Fix Errors Faster with Redesigned Claim Edit Assistant

### Key Benefits:

- More efficient

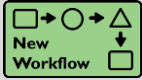
### Description:

- 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 for a claim with Account: FLINT, ARCHIBALD, Invoice: 101280800, Payer: MEDICARE, and Form: (E) CLAIMS HB CEV 837 V5010 INSTITUTIONAL. The interface is divided into several sections:

- Left Sidebar:** Contains patient information for Archibald Flint (Male, 70 years, 5/27/1950, MRN: 210380, Acct ID: 1012808, Fin Class: Medicare BILLED), outpatient status (5/26/2020, EHS PARENT HOSPITAL LOCATION), balances (Total 66.32, Pre: 0.00, Ins: 66.32, SP: 0.00), and guarantor information (Archibald Flint [7270], Personal/Family - Self).
- Claim Summary:** Shows an error claim with a total charge of 356.50. It includes the claim mailing address: 123 ANYWHERE STREET, VERONA, WI 53593.
- Recent History:** A log of recent actions, including "Added to workqueue" and "Error added" for invalid subscriber identification numbers.
- Claim Attachments:** A table listing attachments with details like Attachment Record ID, Attachment Control Number, Type Code, and Status.
- Claim Edit Workqueues:** A table showing workqueues with their names and due dates.
- System Context:** Provides additional context about the claim, including the form, payer, plan, location, and department.
- Right Sidebar (User Errors):** Lists active errors, such as "Insurance ID Format is Not Valid" and "CEV Error - Subscriber Address Invalid", with options to override or edit them.





## 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 image shows a screenshot of the Epic Claim Edit Assistant sidebar. The sidebar is titled 'Claim Errors' and displays a list of errors for claim 100902800. The first error, 'Claim Has Incomplete Attachment Record', is highlighted with a red box. A red arrow points from this error to a larger, detailed view of the same error on the right. This detailed view includes sections for 'General Information' and 'Fix Instructions'. The 'Fix Instructions' section provides specific steps for resolving the attachment issue.

**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  
Extension 70550 200 - Billing  
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 CODE  
[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.

**Claim Errors**

Claim Edit > 100902800 Refresh Claim

[Back to Error List](#)

**Claim Has Incomplete Attachment Record** Override  
Extension 70550 200 - Billing  
No encounters were selected for the attachment.

**General Information**  
There are multiple possible error messages for this edit check. Please scroll to find the appropriate instructions.

**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.

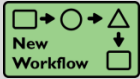
**The attachment record is missing the type code, transmission code, or attachment control number.**

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).

The screenshot displays the Epic Patient Station interface for a patient named Jessie Walker. On the left sidebar, under 'MyChart: Inactive', the 'LOA: Weekend Pass' status is highlighted with a red box labeled 'A'. In the main area, the 'LOA Update' button is highlighted with a red box labeled 'B'. The right pane shows the 'Update Leave' form, where the 'Reason for leave' dropdown menu is highlighted with a red box labeled 'C' and contains the text 'Day Pass'. At the bottom right of the form, the 'Update Leave' button is highlighted with a red box labeled 'D'. The form also includes fields for 'Update Date', 'Update Time', 'Hold old bed', 'Bed service priority', 'Return date', 'Return time', 'Hospital area', 'Unit', 'Room', 'Bed', 'Patient class', and 'Service'.



## 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.

The screenshot shows the 'Patient Care Team' interface. At the top, there are search bars for 'Search for PCP' and 'Search for Team Member', each with an '+ Add' button. To the right, there are checkboxes for 'Show: Past Team Members' and 'Deleted'. Below these is a table with columns: Team Member, Relationship, Specialty, Start, End, and Updated. A row is visible for 'Grey, Becky, MD' with relationship 'PCP - General', start date '08/17/2018', and an 'End' button. Below the table, a yellow warning box states: 'This provider has an inactive address. The system cannot send communications to this address.' An 'Update Address' button is highlighted with a red box within this warning area.

Team Member	Relationship	Specialty	Start	End	Updated
Grey, Becky, MD	PCP - General		08/17/2018	<a href="#">End</a>	8/16/18

**Warning:** 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	Number of Payments
93.57	24
Minimum: 0.01	Maximum: 2400
Statement Day Of Month	Final Payment
29	August 2022

**+ Add Auto Pay**



## Payment Distribution



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

#### Key Benefits:

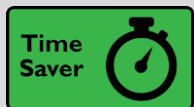
- Improved workflow

#### 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.

Acct ID	Self-Pay Status
4000000610	Pmt Plan
4000001273	No Stmt

**Advanced Filters**  
☒ Outstanding  
☒ On Payment Plan  
☒ Not on Statement



### 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.

**Outstanding Self-Pay**  
Marley B. Leamon  
P/F #112590

**Pay Now**  
Professional: 1,910.85  
Bad Debt: 42,126.00  
Total Outstanding: 44,036.85

**Distribute** Manual  
Include: Patient Responsibility All Balances Other Advanced Filters  
Remaining to Distribute: 500.00

**Collecting**  
500.00



## 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:

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

**Print Manager**

Date: 12/3/2020  
Time: 2:38 PM

**HMH ALKEK 7**  
**HMH ALKEK 7**

Patients: 8  
Beds: 31

Room/Bed	Patient Name	Age/Gender	Primary Problem	Attending	Isolation	Code Status
0731/0731-A						None on file
0732/0732-A	Stroke, Friday	67 y.o. / F	None	Appel, Stanley H., MD		None on file
0733/0733-A	Pathwaytestip, Limping	42 y.o. / F	Suspected COVID-19 virus infection (Principal Hospital Problem)	Abdelmoula, Mohamed, MD	Contact, Droplet	None on file
0734/0734-A	Thad, July	70 y.o. / F	None	Appel, Stanley H., MD		None on file
0735/0735-A	Chipway, Ansley	67 y.o. / F	Acute diastolic congestive heart failure (HCC) (Principal Hospital Problem)	Robben, Christopher, MD	Contact	None on file
0736/0736-A						None on file
0736/0736-B						None on file
0737/0737-A	Thursday, Bradis	60 y.o. / F	Ischemic (Additional Hospital Problem)	Appel, Stanley H., MD		None on file
0737/0737-B						None on file
0738/0738-A						None on file
0738/0738-B	Pathwaydrtmedino33 y.o. / M	mech, Norech	A-fib (HCC) (Principal Hospital Problem)	Test, Ambphysician, MD	Contact, Droplet	None on file
0739/0739-A						None on file
0740/0740-A	Forth, July	69 y.o. / M	Ischemic stroke (HCC)	Appel, Stanley H., MD		None on file
0741/0741-B						None on file
0742/0742-A						None on file
0742/0742-B						None on file
0743/0743-A						None on file
0743/0743-B						None on file

Page 1 of 2



## Registration – Insurance Verification – Transfer Center

### Feb. 21 Epic Update Companion

The image displays two side-by-side screenshots of the Epic 'Settings' window, specifically the 'Care Areas to Print' section. Both screenshots show the 'HMH ALKEK 7' care area selected. The left screenshot shows the 'Suggested' tab, with a red arrow pointing to the 'Room/Bed' field in the 'Columns to Print' list. The right screenshot shows the 'Custom' tab, with a red box highlighting the 'Disch', 'Status', and 'Patient' fields, and a red arrow pointing to the 'Status' field. The 'Custom' tab also includes a 'Select all (5/29)' link. Both windows have a 'Close' button at the bottom right.

**Left Screenshot (Suggested Tab):**

- Settings
- Care Areas to Print
- ✓ HMH ALKEK 7
- Columns to Print
- Suggested Custom
- Room/Bed
- Patient Name
- Age/Gender
- Primary Problem
- Attending
- Isolation
- Code Status
- Close

**Right Screenshot (Custom Tab):**

- 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



### 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

Discharge Planning for Pathwaytesthip, Limping

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  
☐ Enter Post Discharge Transportation Status  
☐ Complete Med Reconciliation  
☐ 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><b>Nusaybah Odeh</b> (Legal) <b>1</b></p> <p>Pronouns: she/her/hers</p> <div> <div> <p>26 yo, 2/17/1994</p> <p>Gender identity: Female</p> <p>Legal sex: Female</p> <p>Sex assigned at birth: Female</p> <p>Marital status: Significant Other</p> <p>Ethnicity: African American</p> </div> <div> <p>Preferred language: English</p> <p>Employer: Betty's Pastry Shop</p> <p>Occupation: Baker</p> <p>MRN: &lt;383666&gt;</p> </div> <div> <p>Patient Contacts</p> <p>Odeh, Alana (Mother)</p> <p>608-555-1234 (Mobile)</p> <p>Unit: WI PRAIRIE BLUFF ED</p> <p>Bed: WI PB CRITICAL CARE 2 / PB CRITICAL CARE 2</p> <p>1979 Milky Way Drive</p> <p>Verona WI 53593</p> <p>608-555-1979 (Home Phone) ★</p> <p>608-555-9791 (Work Phone)</p> </div> </div>	<p><b>Nusaybah Odeh</b> (Legal) <b>2</b></p> <p>Pronouns: she/her/hers</p> <div> <div> <p>26 yo, 2/17/1994</p> <p>Gender identity: Female</p> <p>Legal sex: Female</p> <p>Marital status: Significant Other</p> <p>Employer: Betty's Pastry Shop</p> <p>Occupation: Baker</p> <p>SSN: xxx-xx-3521</p> <p>MRN: &lt;383666&gt;</p> <p>CSN: 10002147367</p> </div> <div> <p>Patient Contacts</p> <p>Odeh, Alana (Mother)</p> <p>608-555-1234 (Mobile)</p> <p>1979 Milky Way Drive</p> <p>Verona WI 53593</p> <p>608-555-1979 (Home Phone) ★</p> <p>608-555-9791 (Work Phone)</p> </div> </div>
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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'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 transplant episodes. The tooltip includes the title 'All Transplant Episodes', a link to 'Liver Transplant - 4/28/2019 (#1)', and details about the status and coordinator.

All Transplant Episodes
<a href="#">Liver Transplant - 4/28/2019 (#1)</a>
Status: Active Follow-up on 4/28/2019
Coordinator: Epic User

**Kathryn D. Kidney**  
Female, 52 y.o., 4/10/1966  
MRN: 202870  
Code: FULL (has ACP docs)

Search

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



## Secure Chat



### Set Favorites

#### Key Benefits:

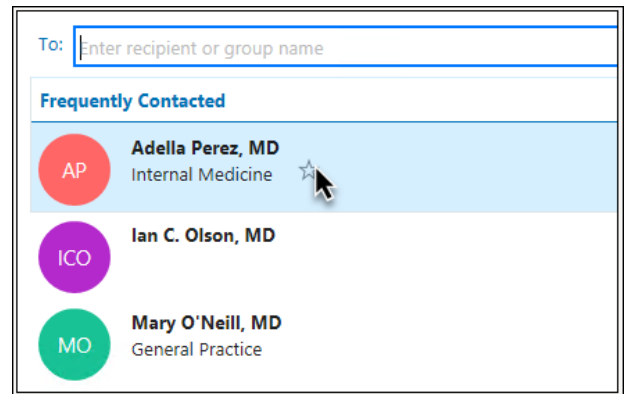
- Improved communication

#### 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:

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



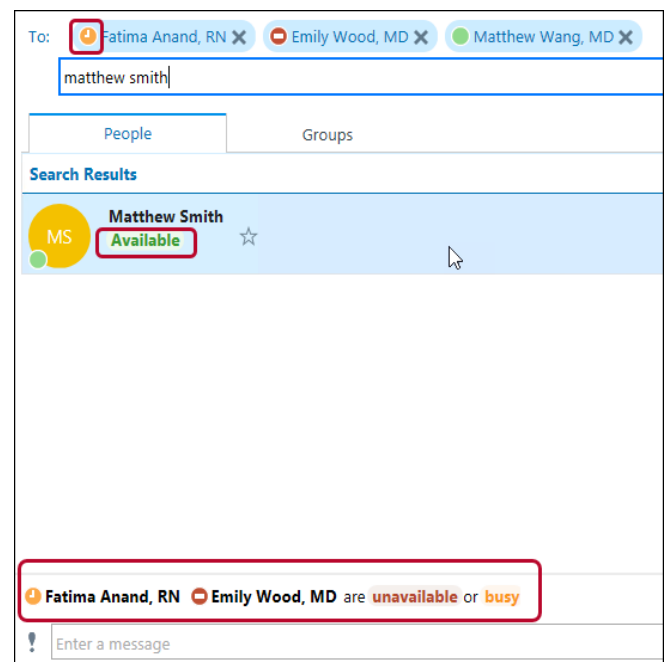
### See More Clearly Whether a Colleague Is Available

#### Key Benefits:

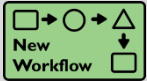
- Easily visible

#### 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



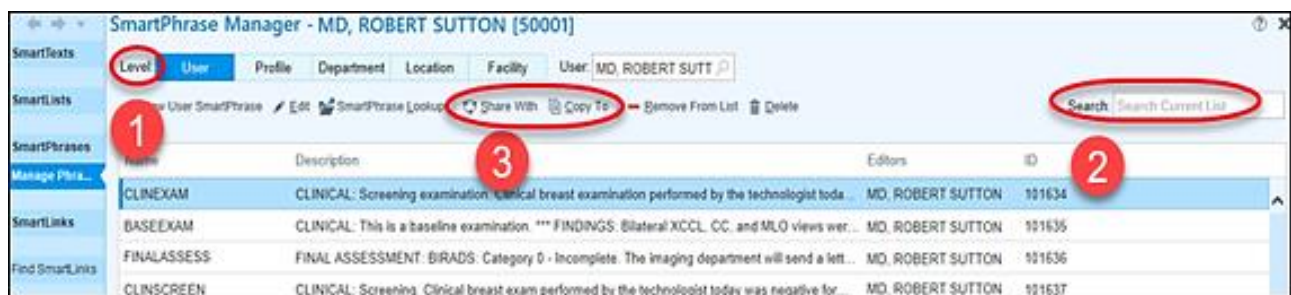
### SmartPhrase Manager: New Look and Streamlined Workflow

#### 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**.

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.



## Registration – Insurance Verification – Transfer Center Feb. 21 Epic Update Companion

### MyChart



### MyChart's New Home Page

#### Key Benefits:

- Improved workflow
- More efficient

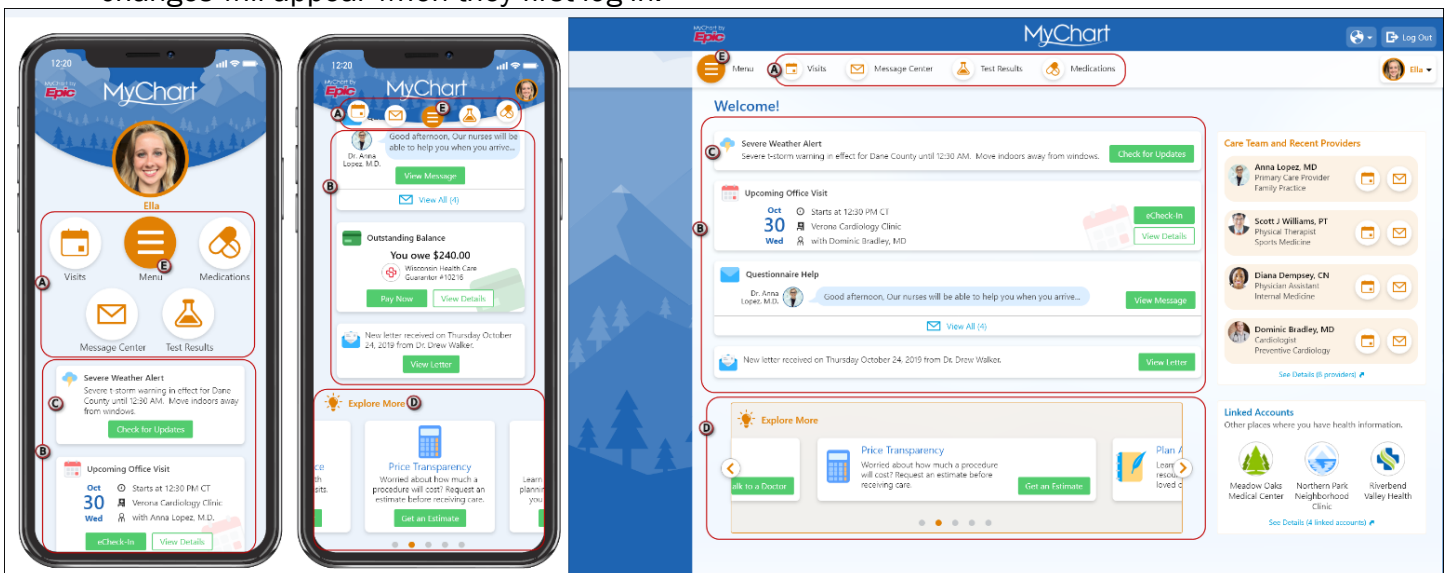
#### Key Benefits:

- 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.



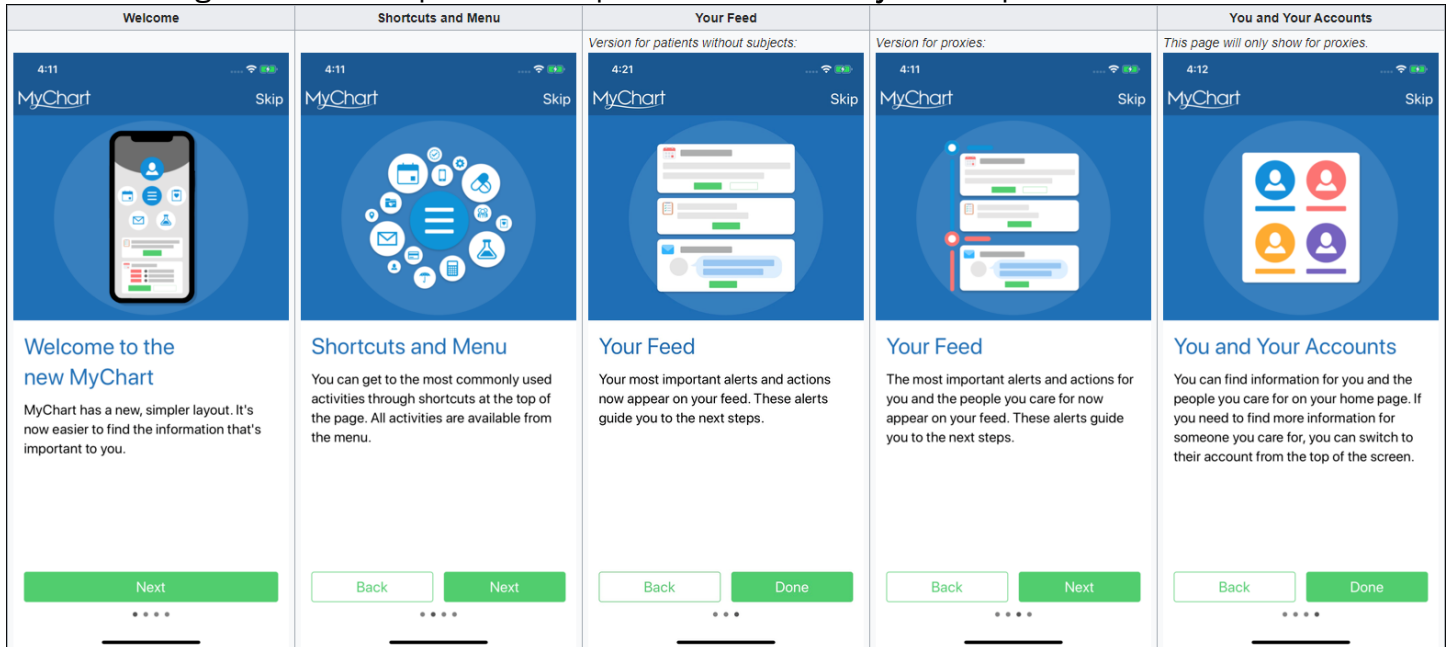
- Shortcuts** on the homepage provides easy access to the four activities a patient uses the most.
- The **health feed** is a consolidated view of actionable health updates, including appointment reminders, check in tasks and messages from the patient's care team.
- Information for proxies and the patients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



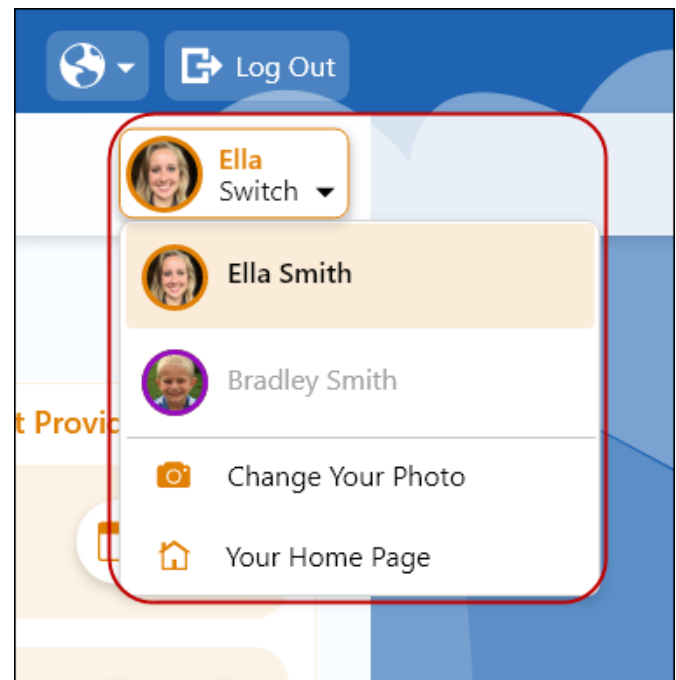


- E. The unified menu provides patients with access to every available activity, in addition to what's accessible through **Shortcuts** or the **health feed**, and patients can search for menu items by name.

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:

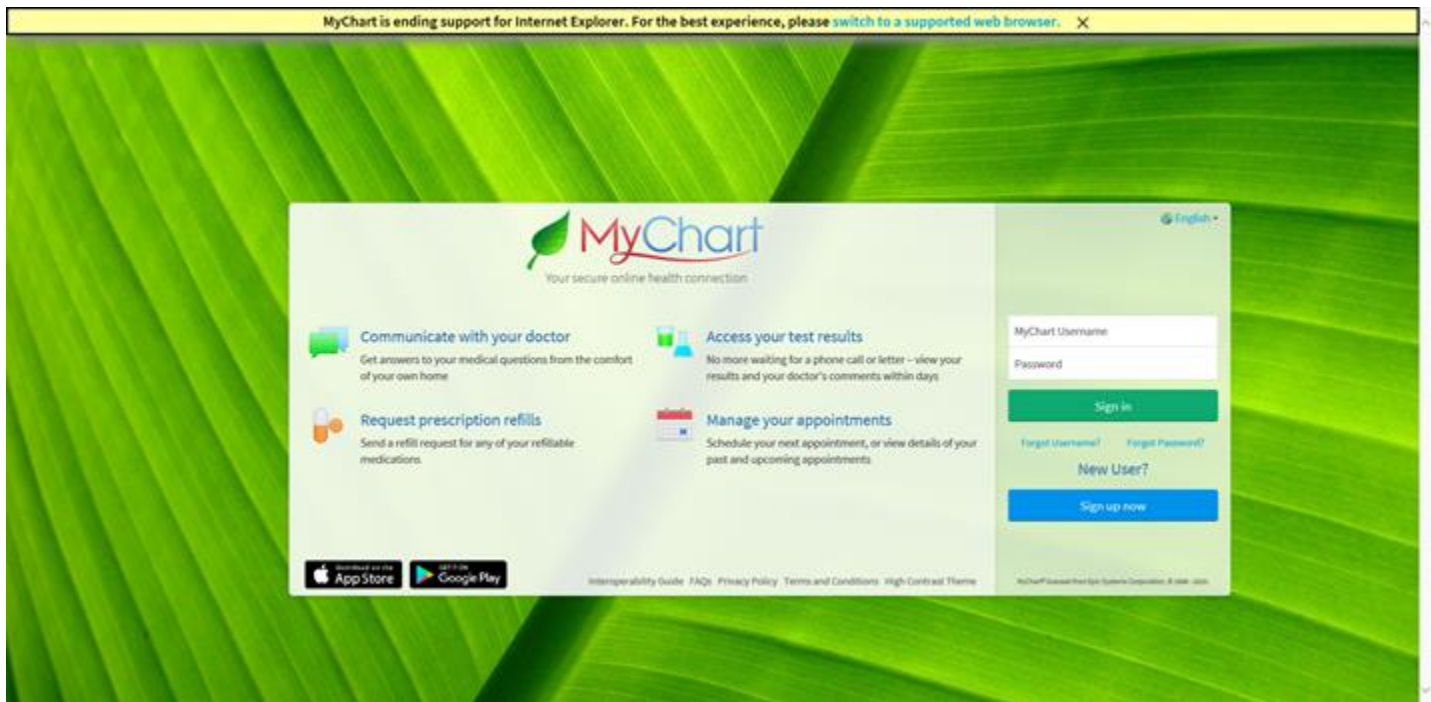
- More accuracy and reliability

### 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**.



## Registration – Insurance Verification – Transfer Center Feb. 21 Epic Update Companion



## 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.



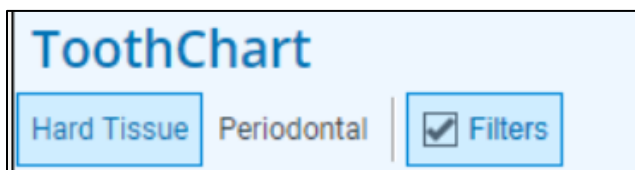
### Easier to Tell When Toolbar Button Is Selected

#### 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.

