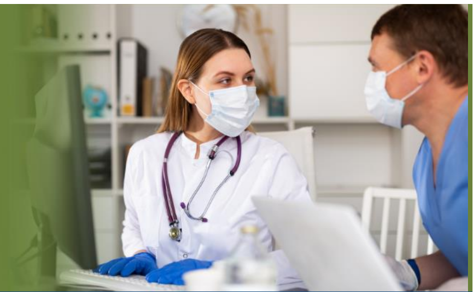
Feb. 21 Epic
Update Companion



Hospital Billing Central Business Office Leadership

Updated: 1/26/21

On Sunday, Feb. 21, Epic will be updated with new features and enhancements to improve safety and quality of care, productivity and financial outcomes. This *Update Companion* contains details of the changes for your role. It is your sole training resource so be sure to review it carefully.

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

- Directors
- Managers
- Supervisors

Top Changes for Role/Department:

1. Claim Edit Workqueues receive a major makeover.
2. Revenue and Usage report is now call HB Posted Charges Summary Report and is Reporting Workbench.
3. Report on COVID-19 information in Denials Report.
4. Manual allowance adjustments are reversed when re-evaluating expected reimbursement.
5. Adjustment edits, from Adjustment/Refund Review workqueues or Tx Inquiry, features a Liability Bucket Lookup to accurately select the destination bucket.

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.

Reporting

New Feature

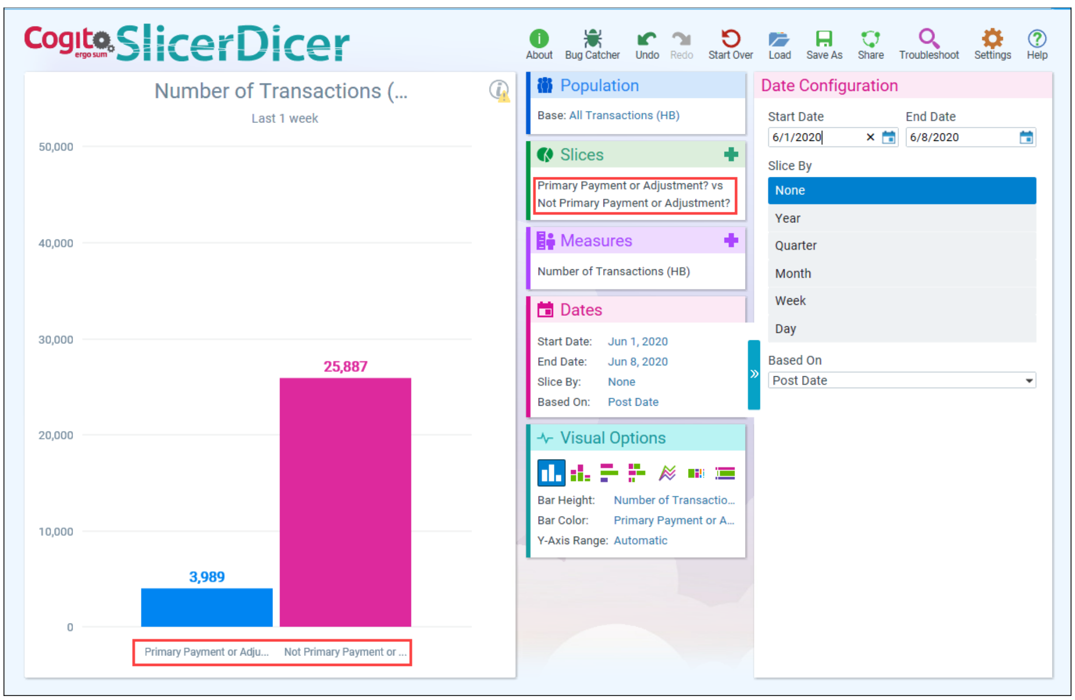
Sort by Primary Payer in Transactions Data Models

Key Benefits:

- Financial benefit

Description:

Use a new filter to sort transactions data based on whether a given payment or adjustment came from the primary payer on a patient's account. This filter can help you investigate payer trends and potentially identify areas for improvement in collecting payments from primary payers.



New Look

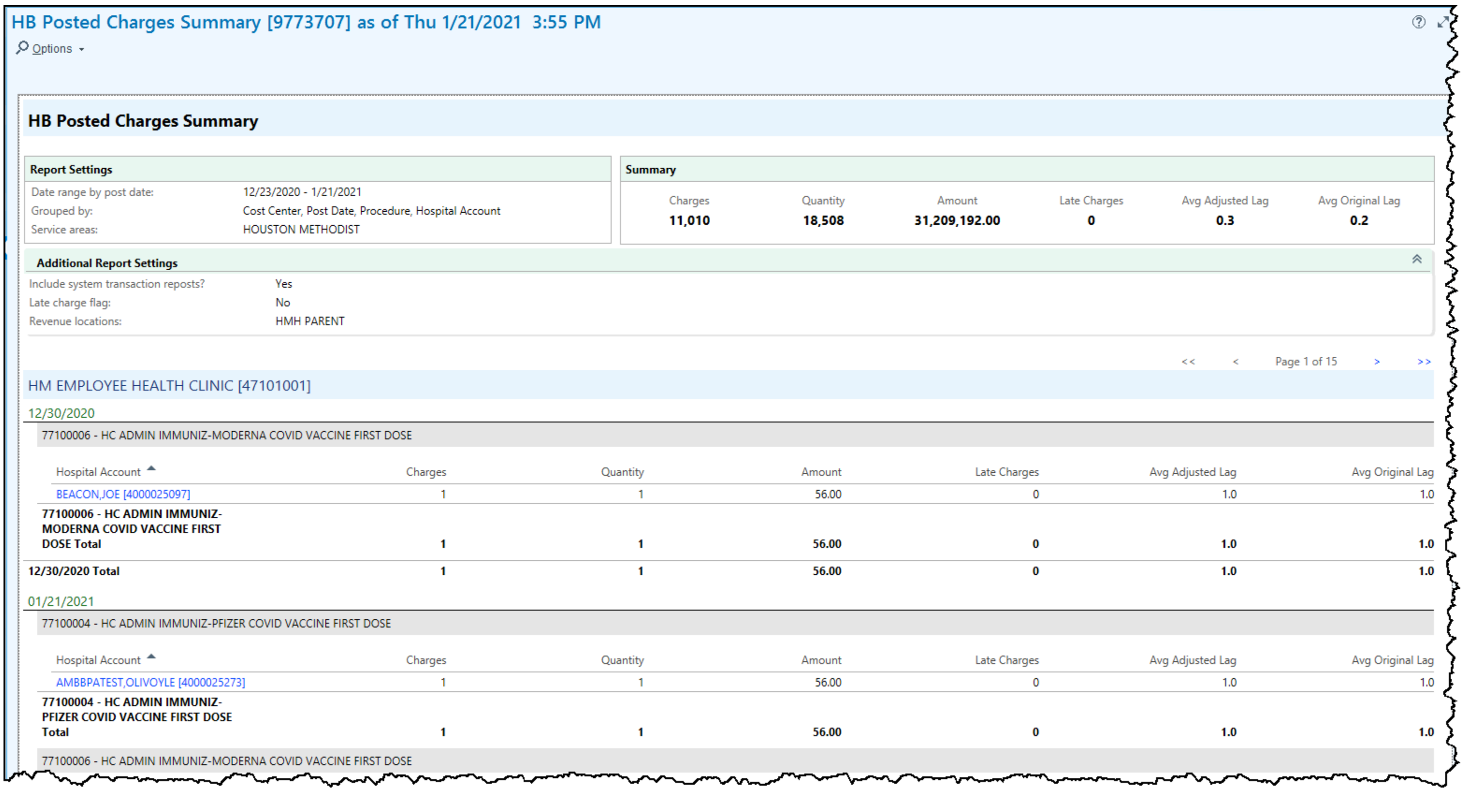
Meet the HB Posted Charges Summary Report

Key Benefits:

- More efficient

Description:

The **Hospital Billing Revenue and Usage report** has a new name: the **HB Posted Charges Summary report.** It has been migrated to **Reporting Workbench**, so you can now schedule reports to run automatically, at specified times, and export the results to a spreadsheet.



HB Posted Charges Summary [9773707] as of Thu 1/21/2021 3:55 PM

Options

HB Posted Charges Summary

Report Settings

Date range by post date:	12/23/2020 - 1/21/2021
Grouped by:	Cost Center, Post Date, Procedure, Hospital Account
Service areas:	HOUSTON METHODIST

Summary

Charges	Quantity	Amount	Late Charges	Avg Adjusted Lag	Avg Original Lag
11,010	**18,508**	**31,209,192.00**	**0**	**0.3**	**0.2**

Additional Report Settings

Include system transaction reposts?	Yes
Late charge flag:	No
Revenue locations:	HMH PARENT

<< < Page 1 of 15 > >>

HM EMPLOYEE HEALTH CLINIC [47101001]

12/30/2020

77100006 - HC ADMIN IMMUNIZ-MODERNA COVID VACCINE FIRST DOSE

Hospital Account	Charges	Quantity	Amount	Late Charges	Avg Adjusted Lag	Avg Original Lag
BEACON,JOE [4000025097]	1	1	56.00	0	1.0	1.0
77100006 - HC ADMIN IMMUNIZ-MODERNA COVID VACCINE FIRST DOSE Total	**1**	**1**	**56.00**	**0**	**1.0**	**1.0**
12/30/2020 Total	**1**	**1**	**56.00**	**0**	**1.0**	**1.0**

01/21/2021

77100004 - HC ADMIN IMMUNIZ-PFIZER COVID VACCINE FIRST DOSE

Hospital Account	Charges	Quantity	Amount	Late Charges	Avg Adjusted Lag	Avg Original Lag
AMBBPATEST,OLIVOYLE [4000025273]	1	1	56.00	0	1.0	1.0
77100004 - HC ADMIN IMMUNIZ-PFIZER COVID VACCINE FIRST DOSE Total	**1**	**1**	**56.00**	**0**	**1.0**	**1.0**

77100006 - HC ADMIN IMMUNIZ-MODERNA COVID VACCINE FIRST DOSE

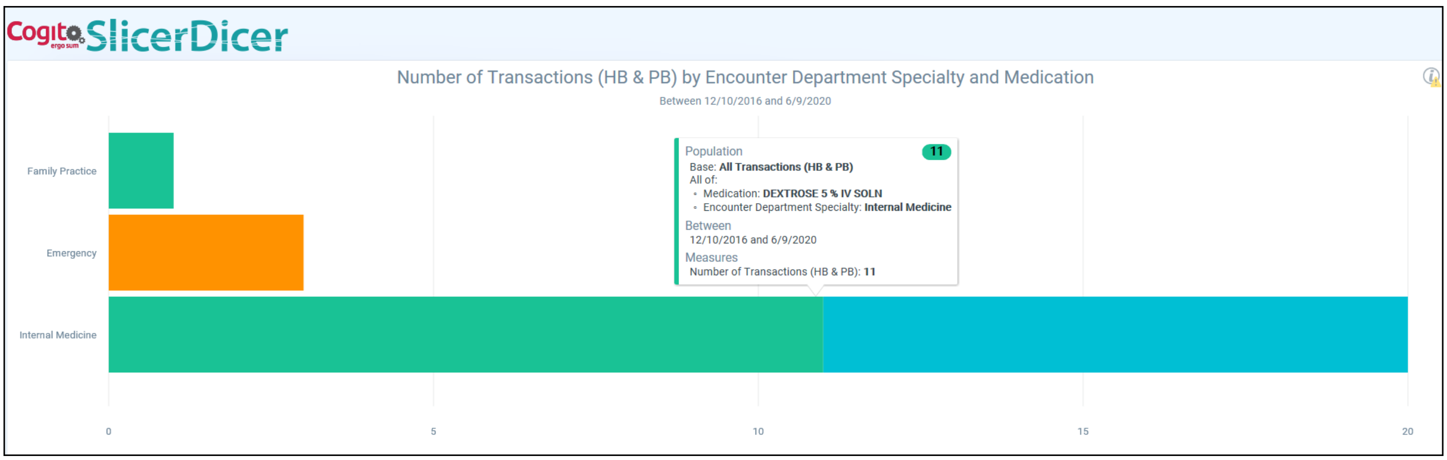
New Feature — Sort Billing Data by Charge Source, Encounter Department and More

Key Benefits:

- Financial benefit
- More efficient

Description:

We've added several new **SlicerDicer** filters to match some of the data used for the **HB Posted Charges Summary Report**. For example, you can now see which medication transactions originate from any given specialty area within your organization.



epictraining@houstonmethodist.org | it.houstonmethodist.org

Key Change

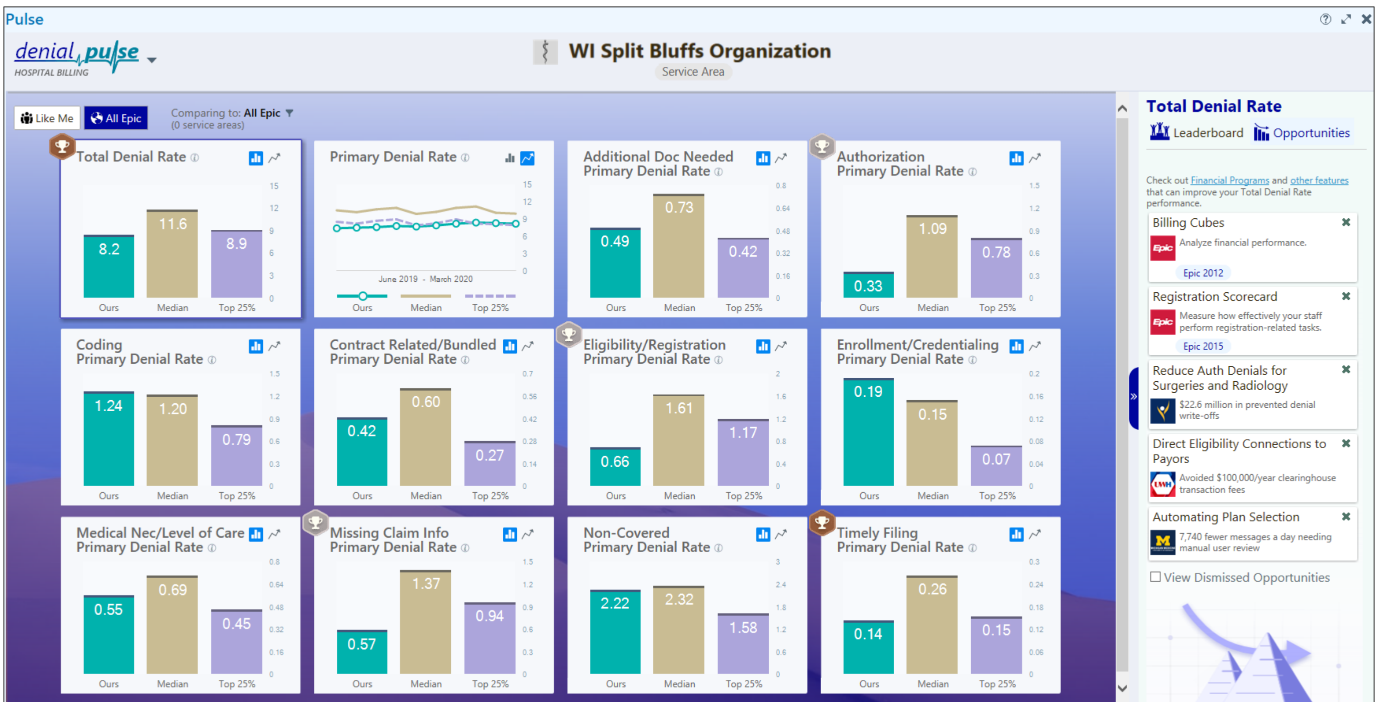
See How Your Denial Rates Measure Up

Key Benefits:

- Financial benefit

Description:

You can now compare denial rates and reasons with the broader Epic community using **Denial Pulse**, available alongside both **Financial Pulse** and **Automation Pulse.** The new dashboards allow you to perform benchmarking against other Epic organizations and help you identify opportunities to increase your revenue cycle efficiency.



New Feature

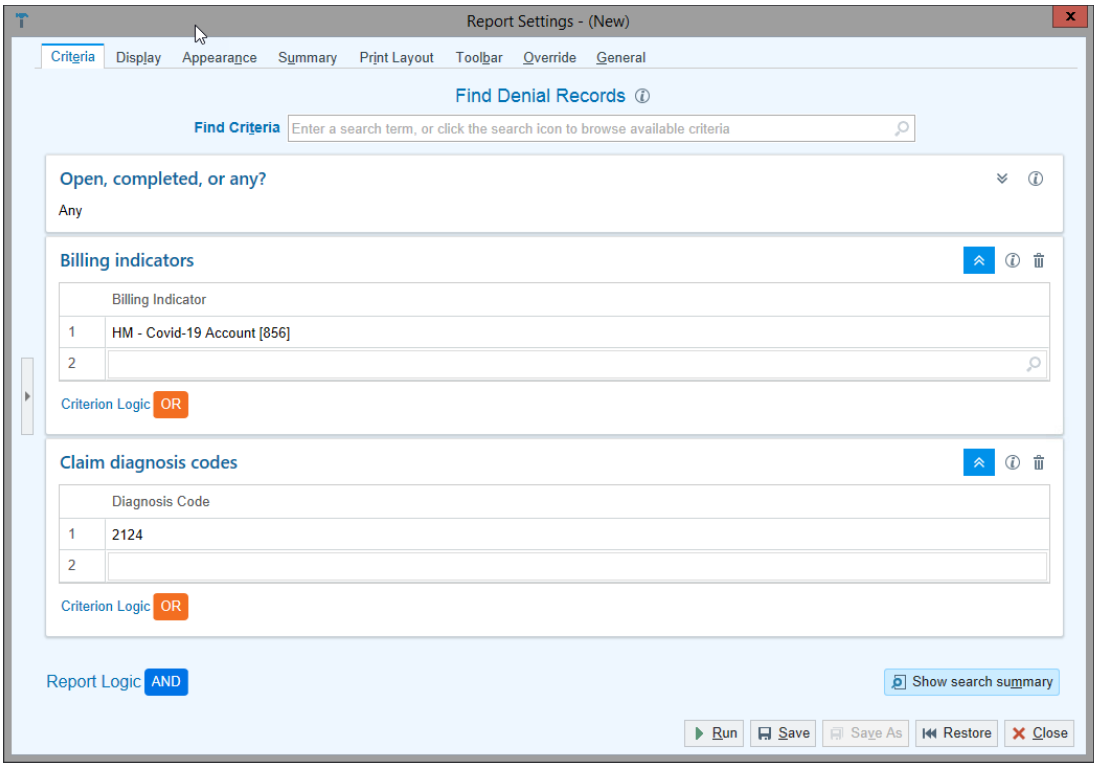
Report on COVID-19 Information in Denials Reports

Key Benefits:

- Financial benefit

Description:

To help you investigate and follow up on COVID-19 denials, use new criteria such as billing indicators and claim diagnosis codes in your **Denials Reports.**



Time Saver

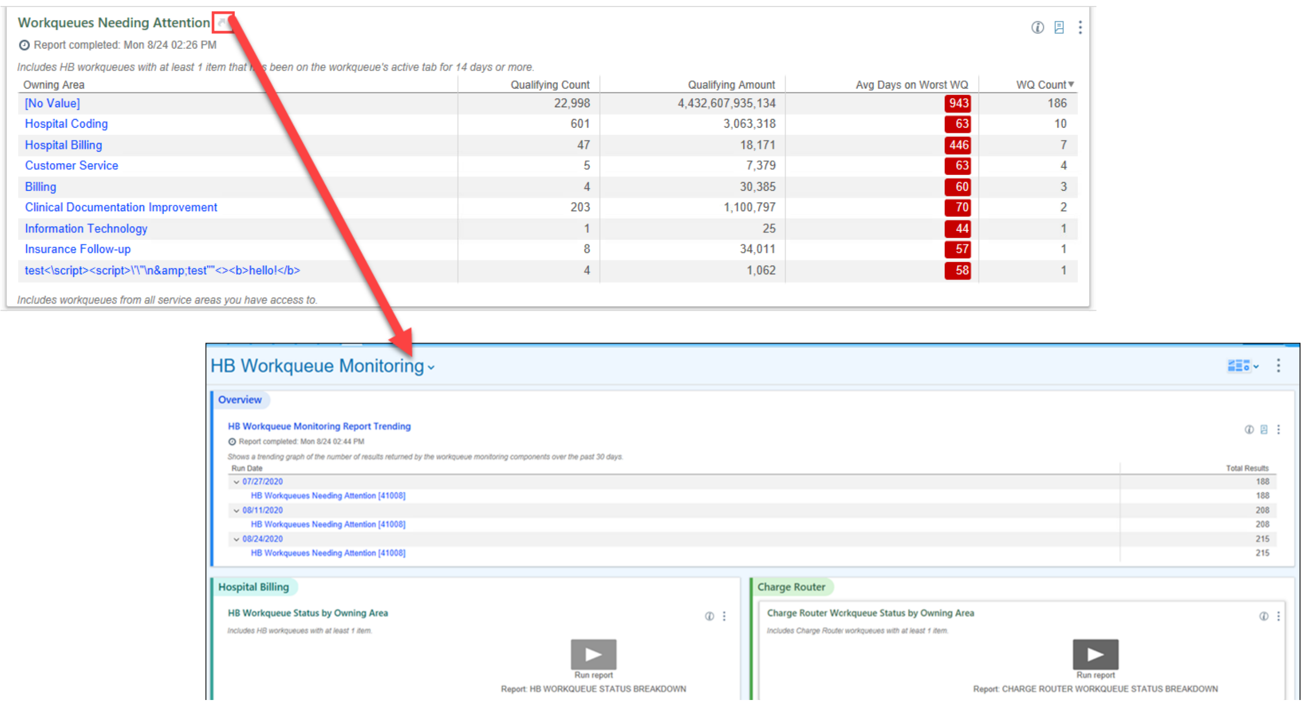
Jump Between Linked-Up Workqueue Monitoring Dashboards and Components

Key Benefits:

- Time saver

Description:

No more rummaging through the **Analytics Catalog** when you need more information about something you spot in the **HB** or **PB Workqueues Needing Attention** dashboard components. They each now link directly to the **HB** or **PB Workqueue Monitoring Dashboard.**



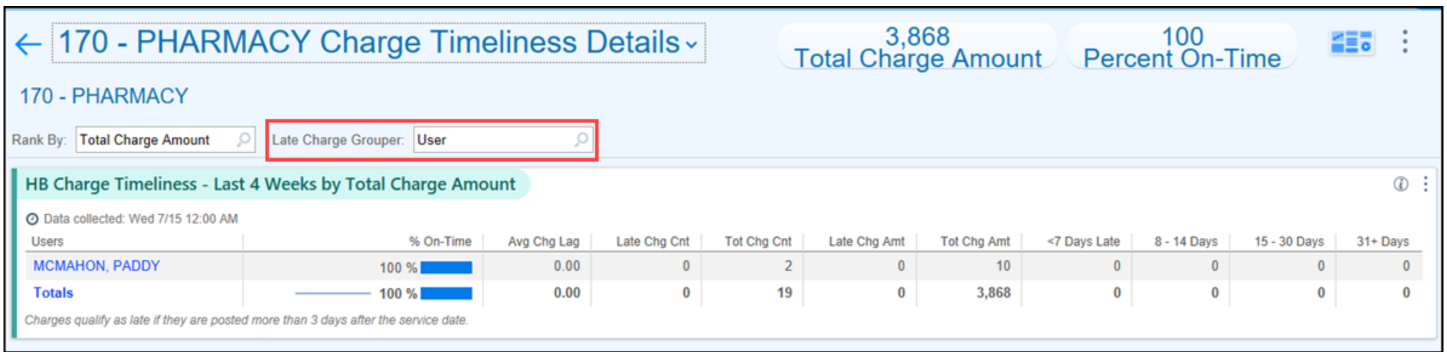
HB Late Charges Cost Center Dashboard Now Groups by User

Key Benefits:

- More efficient
- Time saver

Description:

When you click a cost center link in the **HB Charge Timeliness Report**, the **HB Late Charges Cost Center child** dashboard appears. This dashboard now groups late charges by user as the default, which should allow you a clearer starting place for investigation. You can still switch to other groupers as needed.



Users	% On-Time	Avg Chg Lag	Late Chg Cnt	Tot Chg Cnt	Late Chg Amt	Tot Chg Amt	<7 Days Late	8 - 14 Days	15 - 30 Days	31+ Days
MCMAHON, PADDY	100 %	0.00	0	2	0	10	0	0	0	0
Totals	100 %	0.00	0	19	0	3,868	0	0	0	0

Charges qualify as late if they are posted more than 3 days after the service date.

New Feature

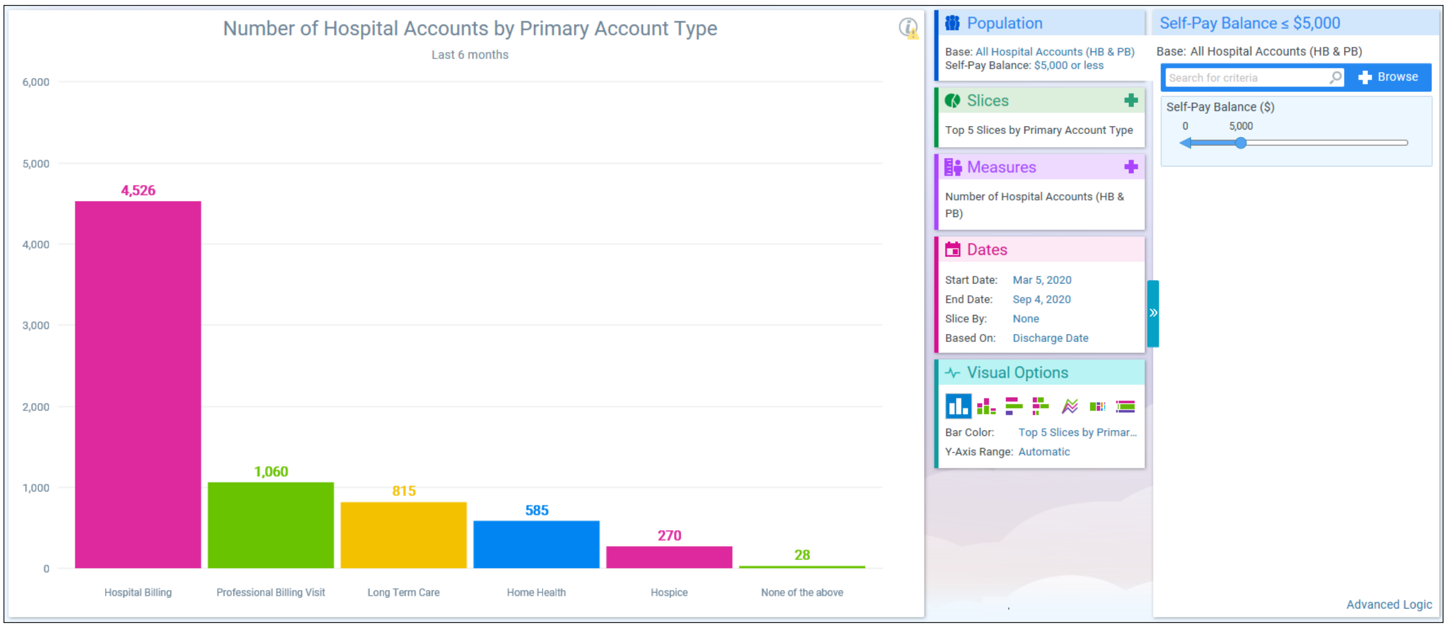
Explore Hospital Account Data Based on Account Type

Key Benefits:

- Financial benefit

Description:

You can now slice data based on hospital account type using the new **Primary Account Type**, **Related Account Type**, and **Account Types (All) filters** in the **Hospital Accounts (HB & PB) SlicerDicer data model.** For example, you might use the filters to compare self-pay balances on different primary account types.



New Feature

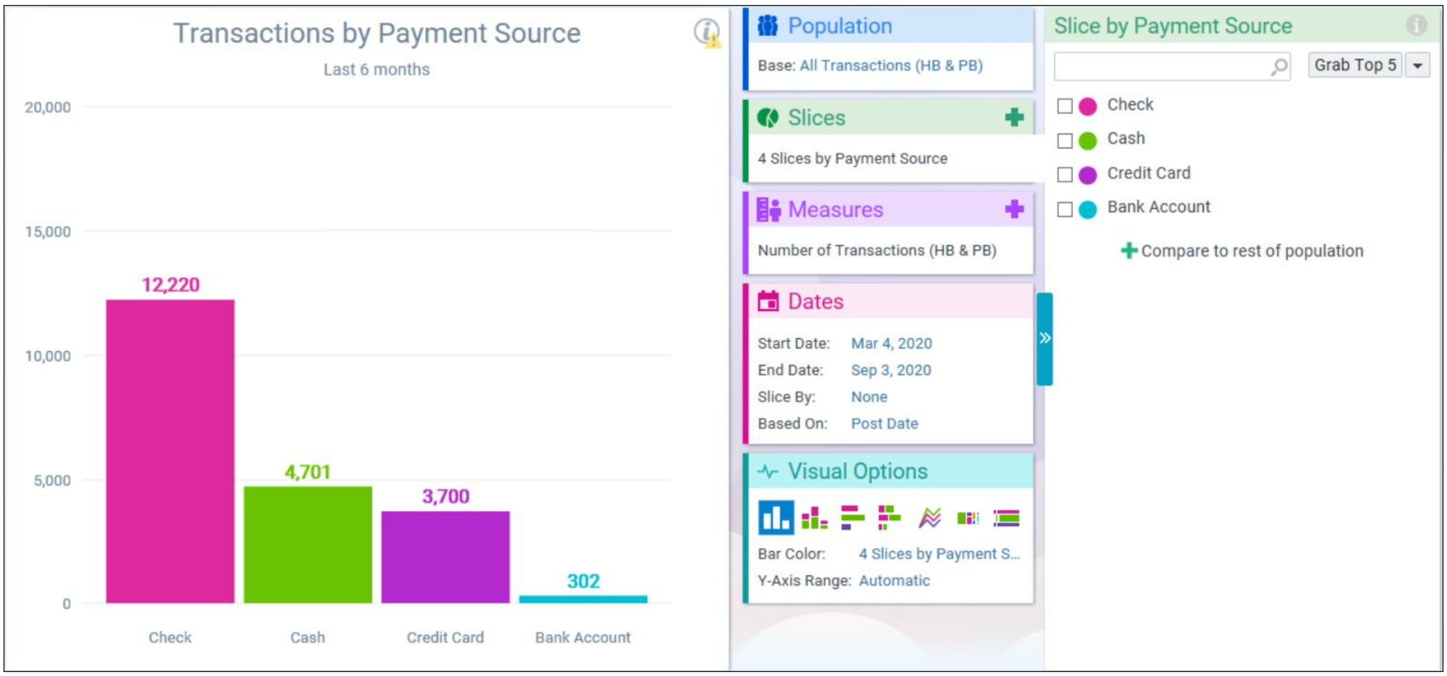
Delve Deeper into Transaction Data in SlicerDicer

Key Benefits:

- Financial benefit

Description:

You can now dive deeper into transaction data using new filters in the **Transactions data models** in **SlicerDicer.** For example, you can filter by payment source to review the most common ones.



New Look

More Automation Metrics Come to a Dashboard Near You

Key Benefits:

- Financial benefit
- More efficient
- More accurate and reliable

Description:

We've added automation metrics to components in several dashboards to help you determine the extent to which you're taking advantage of automated processes in Epic. For example, you can take a quick glance at the **HB** or **PB Revenue Integrity Dashboard** to see what percentage of charges at your organization have been triggered automatically through clinical or coding workflows.

Account Maintenance

Key Change

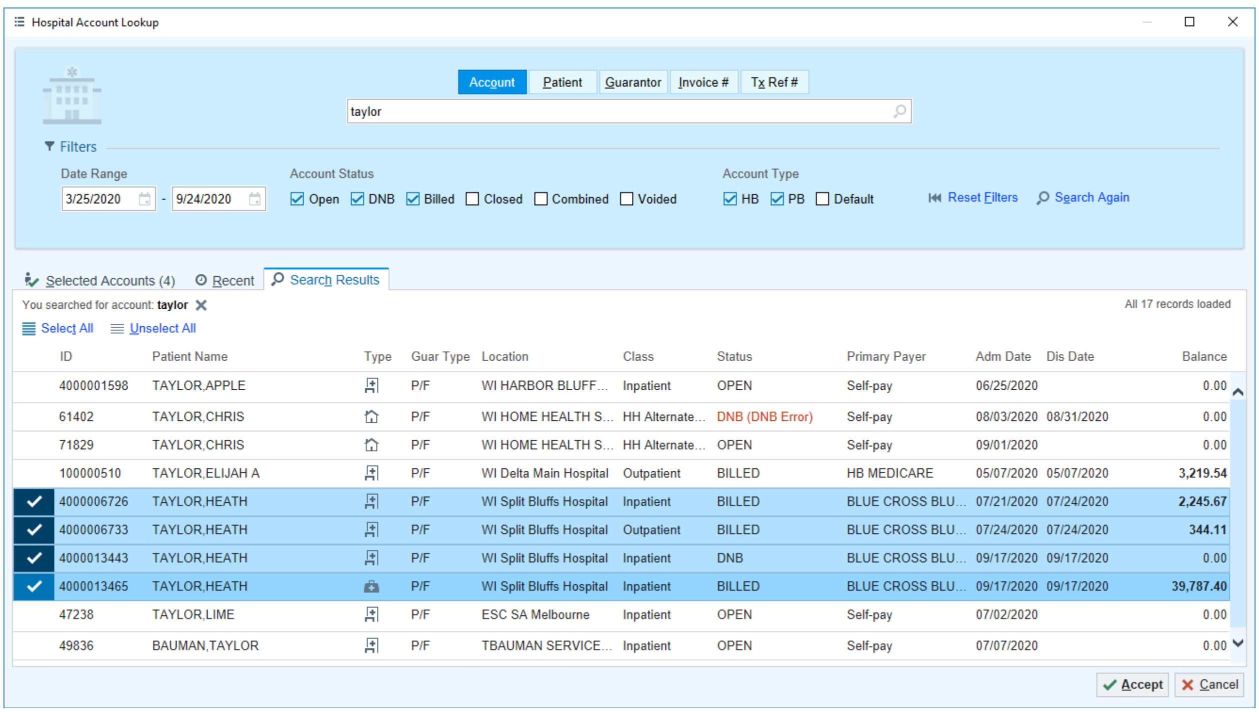
Paste Like a Pro in Hospital Account Lookup

Key Benefits:

- More efficient
- Time saver

Description:

With the new **Hospital Account Lookup activity** (search: Hospital Account), you can paste in a list of HARs from a spreadsheet, and **filter** the results by **date range**, **account status**, and **billing system.** You can **search** for, **select**, and **open** as many HARs as you want at a time.



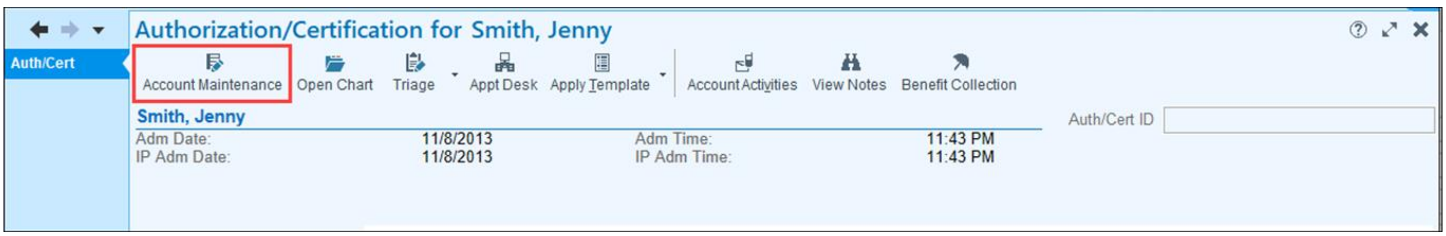
Account Maintenance Button in Auth/Cert Records Opens Encounter's Primary HB HAR

Key Benefits:

- Improved workflow
- Time saver
- More accuracy and reliability

Description:

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



Billing

New Look

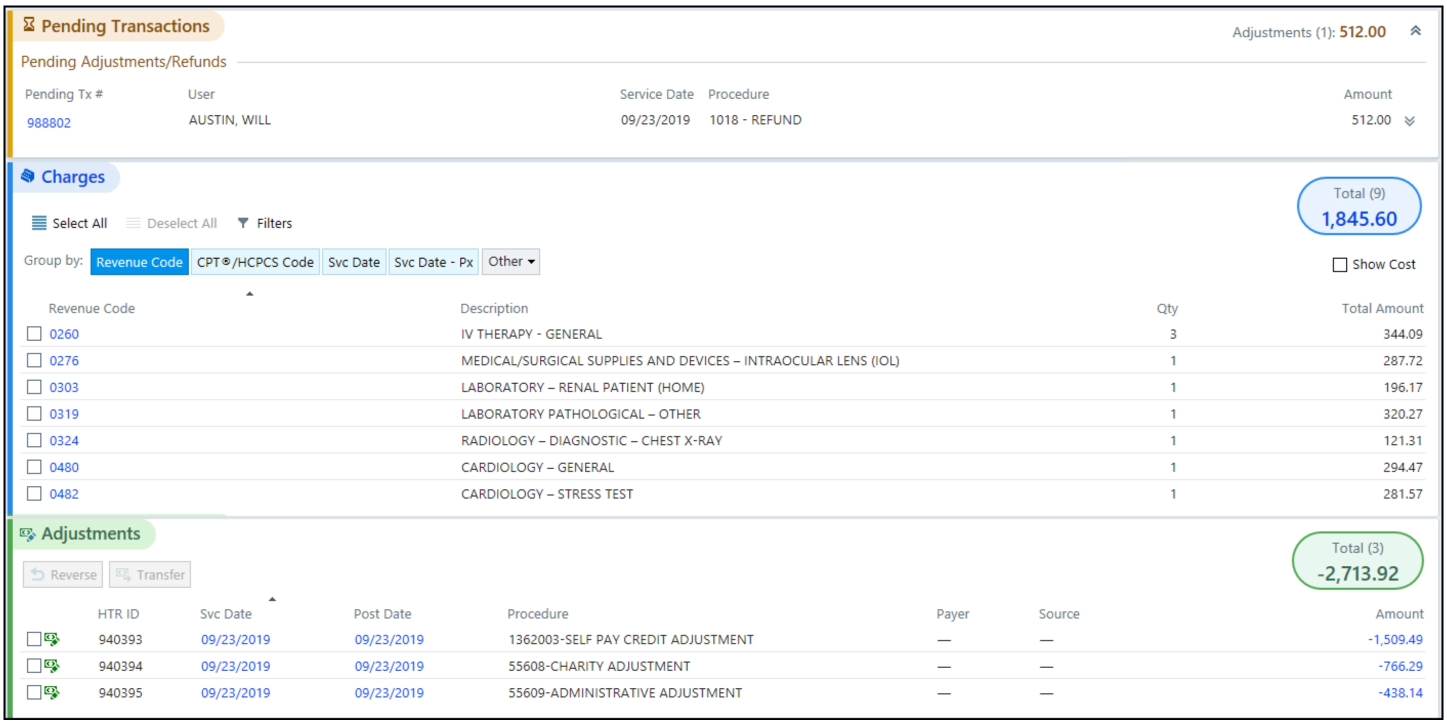
Quickly Review and Act on Transactions

Key Benefits:

- More efficient
- Time saver

Description:

Transaction Inquiry has a new look and new features, like **badges** displaying the total for each section and **quick groupers**, to help you easily sort through details of pending transactions.



Pending Transactions

Adjustments (1): 512.00

Pending Adjustments/Refunds

Pending Tx #	User	Service Date	Procedure	Amount
988802	AUSTIN, WILL	09/23/2019	1018 - REFUND	512.00

Charges

Total (9) 1,845.60

Select All | Deselect All | Filters

Group by: Revenue Code | CPT®/HCPCS Code | Svc Date | Svc Date - Px | Other

Show Cost

Revenue Code	Description	Qty	Total Amount
0260	IV THERAPY - GENERAL	3	344.09
0276	MEDICAL/SURGICAL SUPPLIES AND DEVICES – INTRAOCULAR LENS (IOL)	1	287.72
0303	LABORATORY – RENAL PATIENT (HOME)	1	196.17
0319	LABORATORY PATHOLOGICAL – OTHER	1	320.27
0324	RADIOLOGY – DIAGNOSTIC – CHEST X-RAY	1	121.31
0480	CARDIOLOGY – GENERAL	1	294.47
0482	CARDIOLOGY – STRESS TEST	1	281.57

Adjustments

Total (3) -2,713.92

Reverse | Transfer

HTR ID	Svc Date	Post Date	Procedure	Payer	Source	Amount
940393	09/23/2019	09/23/2019	1362003-SELF PAY CREDIT ADJUSTMENT	—	—	-1,509.49
940394	09/23/2019	09/23/2019	55608-CHARITY ADJUSTMENT	—	—	-766.29
940395	09/23/2019	09/23/2019	55609-ADMINISTRATIVE ADJUSTMENT	—	—	-438.14

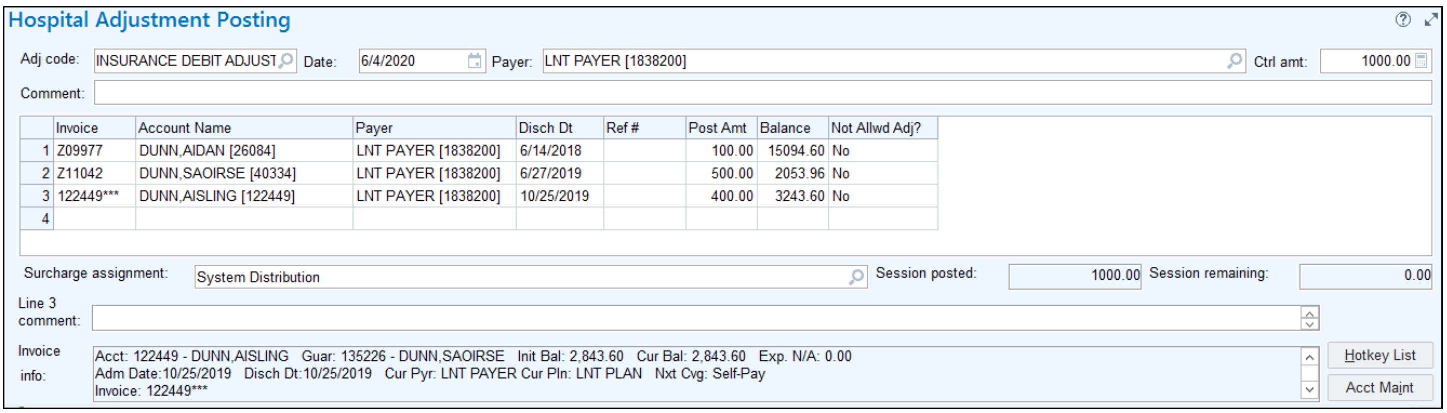
Multi-Line Adjustments Are Now Posted Individually

Key Benefits:

- Financial benefit
- More efficient
- Improved workflow

Description:

In **HB Adjustment Posting**, you no longer see errored and non-errored non-refund adjustment lines grouped together in adjustment review workqueues. This is because non-errored adjustments are now successfully filed, even if they were included in a multi-line adjustment that contained errors. This should make your adjustment review workqueues easier to understand at a glance.



Time Saver

Manual Allowance Adjustments Reversed When Re-Evaluating Expected Reimbursement

Key Benefits:

- Financial benefit
- More accuracy and reliability

Description:

You might see manually posted allowance adjustments removed from insurance buckets when re-evaluating your contracts. This helps to ensure that unallowed amounts are calculated correctly during re-evaluation, which could improve the accuracy of your reports.

Key Change

Easily Create Payment Plans from Enterprise Guarantor Summary

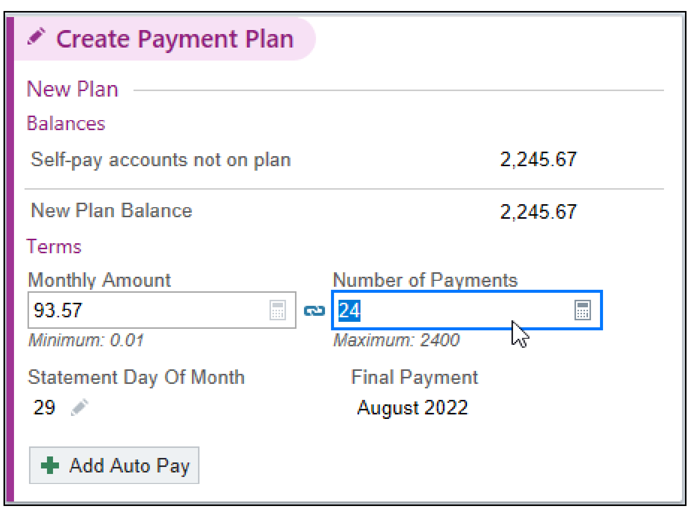
Key Benefits:

- More efficient
- More accuracy and reliability
- Financial benefit

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 using all the guarantor's self-pay balances with guarantor activities from **Enterprise Guarantor Summary** or use **account activities** to select individual HARs for a payment plan.



New Workflow

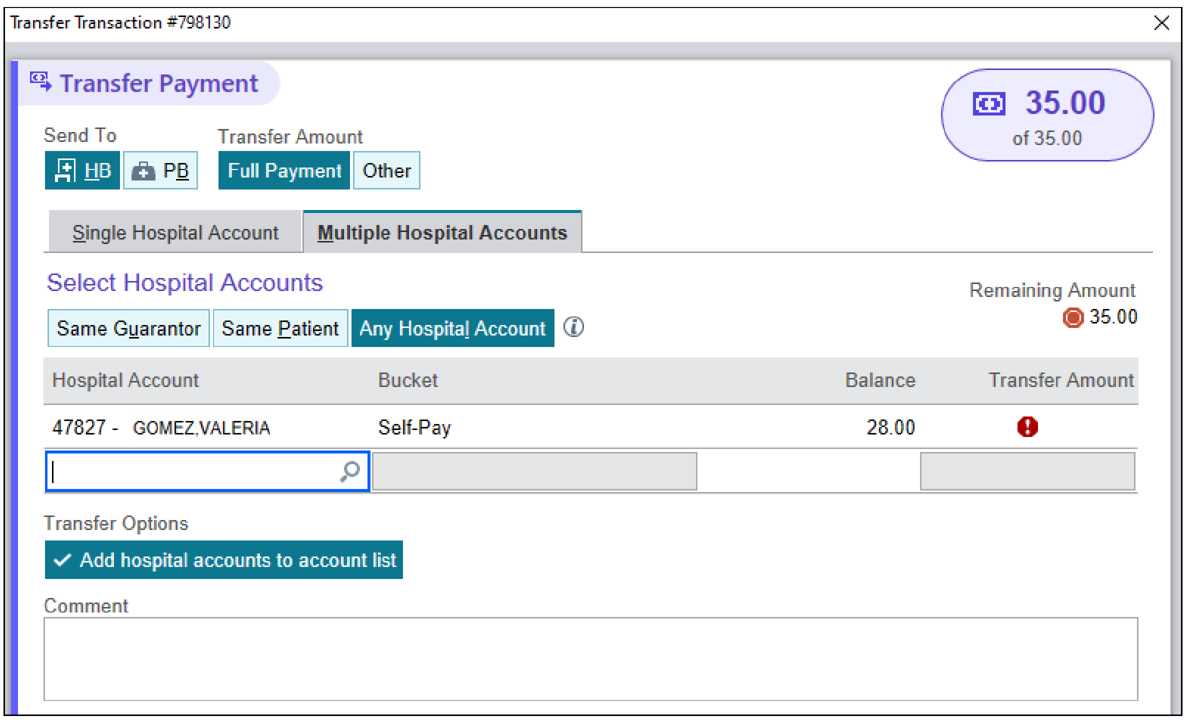
Distribute Action Replaced by Transfer to Multiple in Transfer Transaction

Key Benefits:

- Improved workflow
- More efficient
- Time saver

Description:

The **Distribute action** for **self-pay payments** has been replaced by a multiple-destination option. You can select multiple accounts for distribution of a self-pay payment and add the target accounts to the **Account List** for further review.



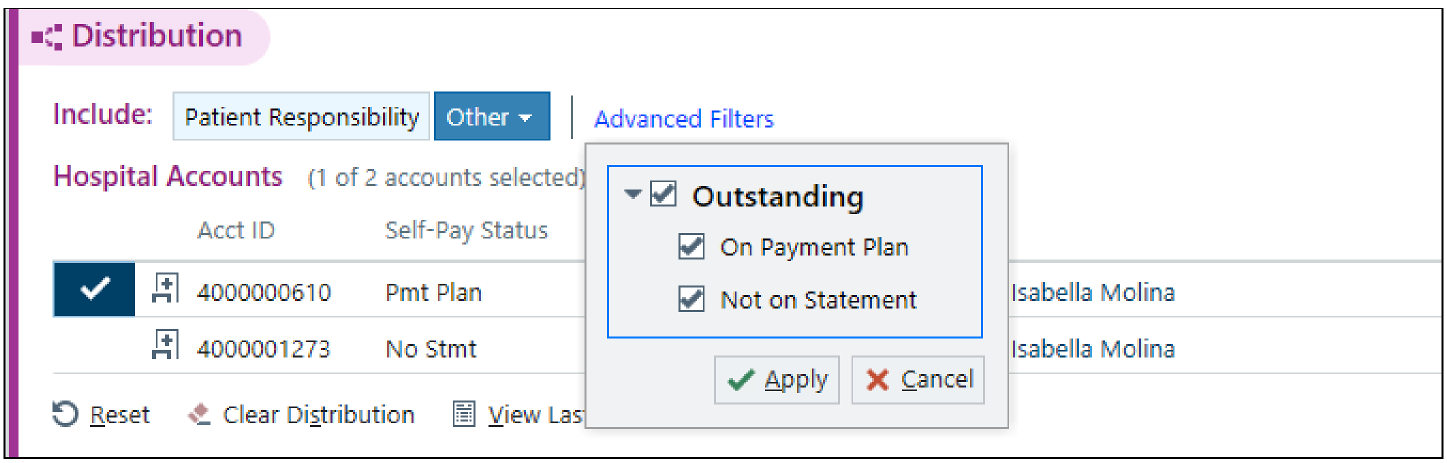
New Look, Simplified Workflow for Enterprise Self-Pay Payment Posting

Key Benefits:

- Time saver
- Improved workflow
- More efficient

Description:

Enterprise Self-Pay Payment Posting has been redesigned to be more visually friendly and to help you speed 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.



New Feature

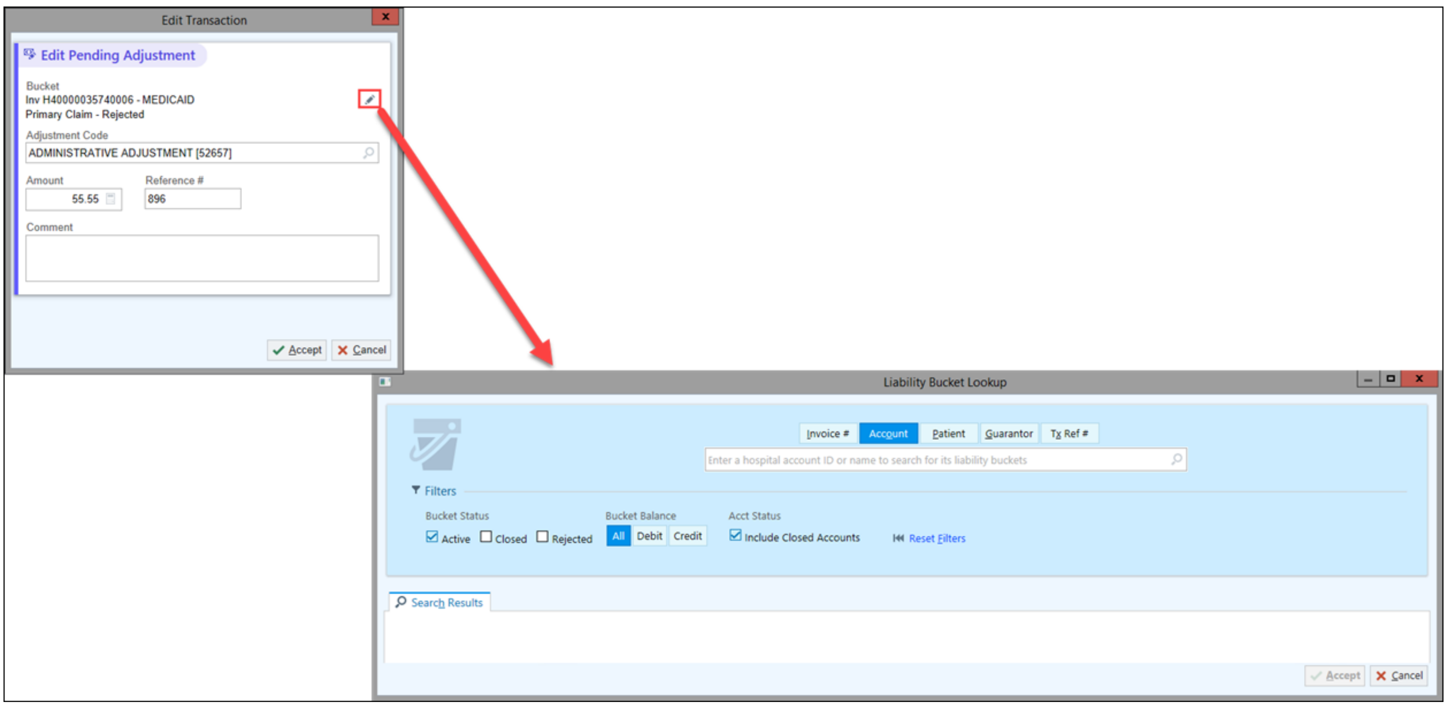
Get More Precise with Your Adjustment Edits in Liability Bucket Lookup

Key Benefits:

- More efficient
- Time saver

Description:

When editing adjustments in adjustment/refund review workqueues or in transaction inquiry, you can now click the **pencil icon** to launch **Liability Bucket Lookup**, where you can use filters and searches to find the correct destination bucket.



Charge Review

New Look

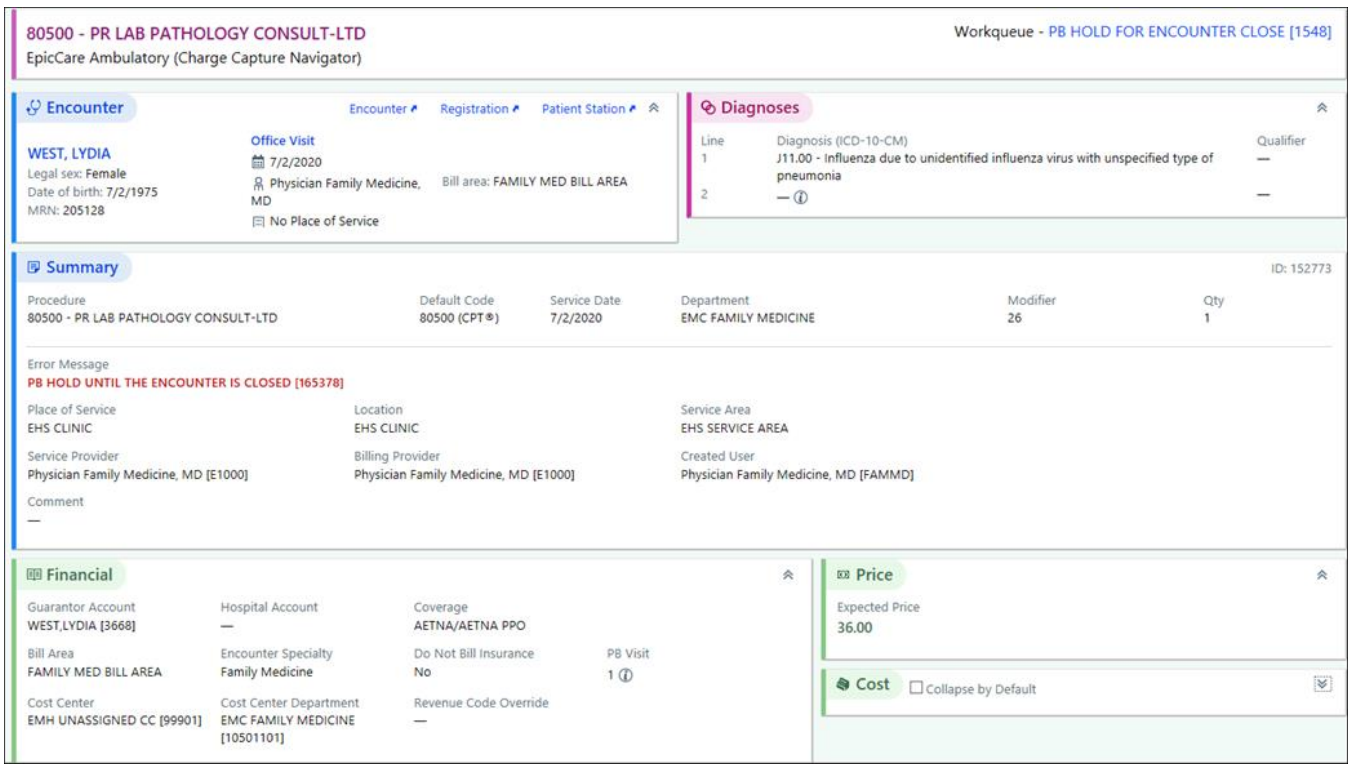
UCL Detail Reports Revamped with More Focused Information

Key Benefits:

- More efficient

Description:

UCL Detail reports, such as the **Charge Router Charge Detail report** activity and the session detail view in **Charge Router** review workqueues, have been visually enhanced and reorganized to help you find key details about a charge line more easily.



New Look

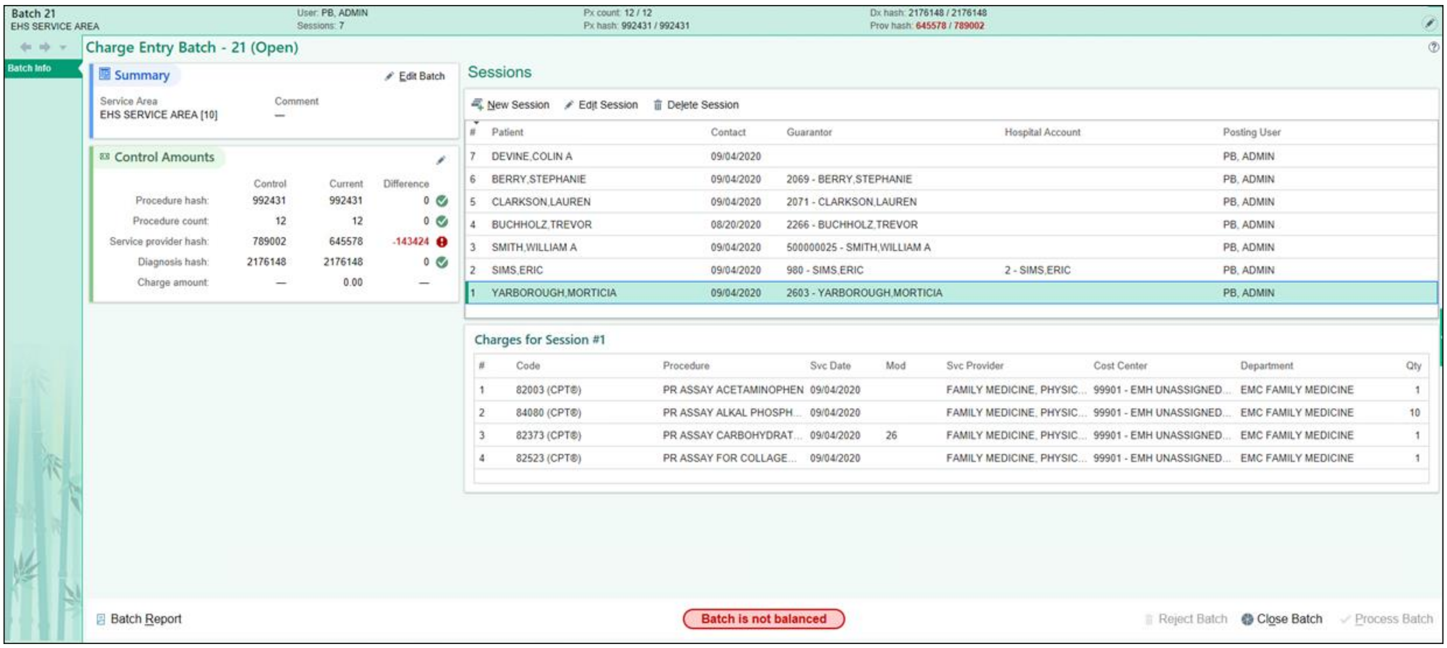
Meet the Improved Charge Entry Batch Activity

Key Benefits:

- Improved workflow

Description:

The **Charge Router Charge Entry Batch activity** has a new and improved appearance that better uses screen space and makes it easier to identify when a batch is balanced.



Claims

Key Change

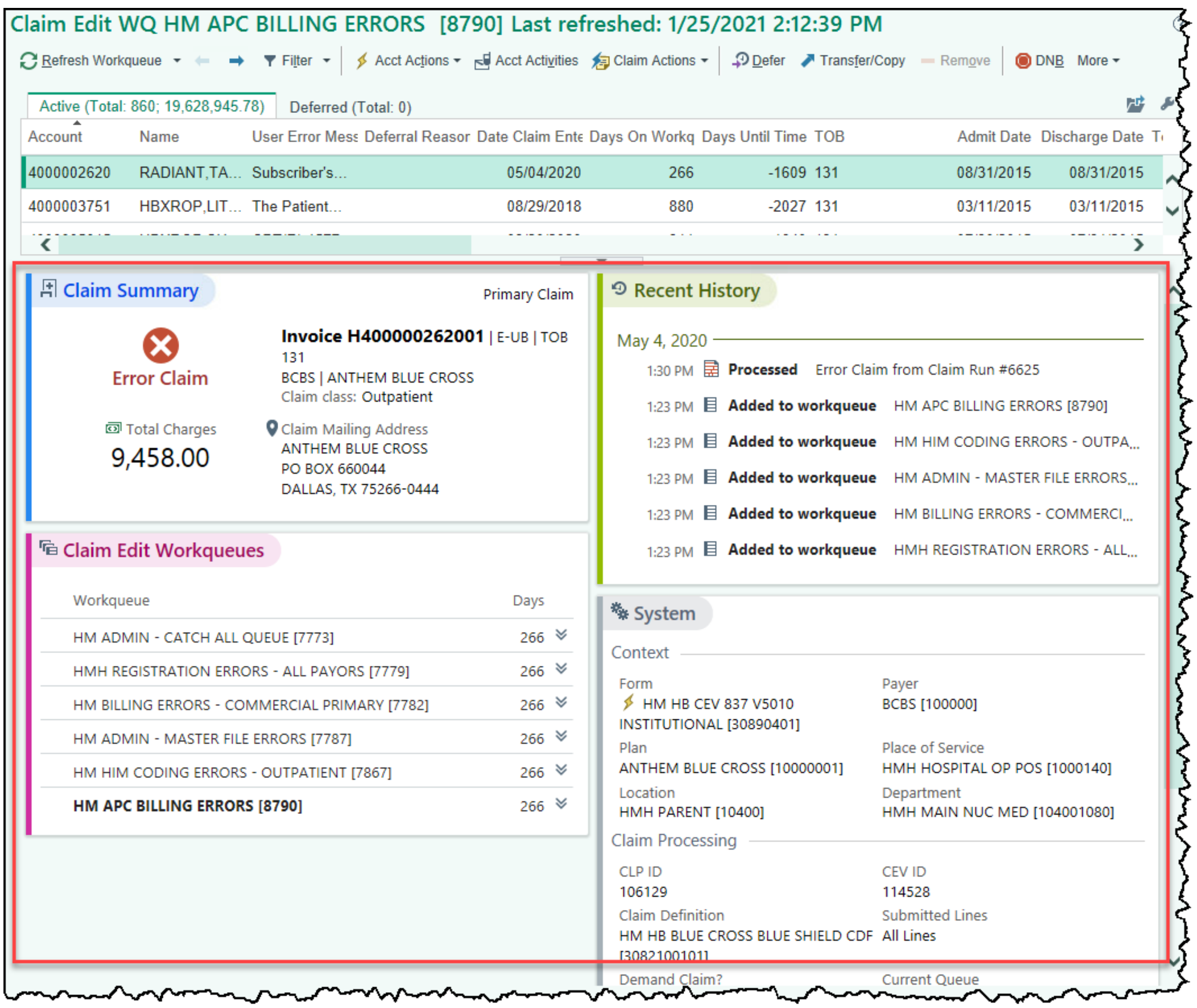
Navigate the Updated Hospital Billing Claim Edit Workqueues

Key Benefits:

- Improved workflow
- More efficient
- Less clicks

Description:

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



Key Change

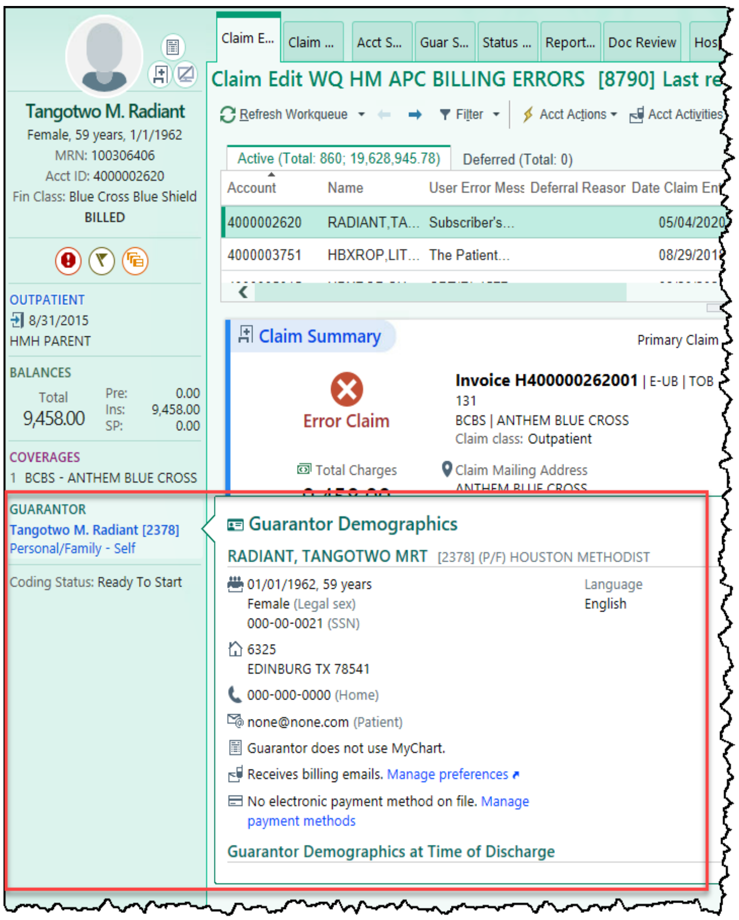
Use Storyboard in Claim Edit Workqueues

Key Benefits:

- More efficient

Description:

Claim edit workqueues now have Storyboard, which gives you a snapshot of guarantors' demographics and coverages. You can also use Storyboard to quickly jump to the **Guarantor Snapshot** activity or to other workqueues.



New Look

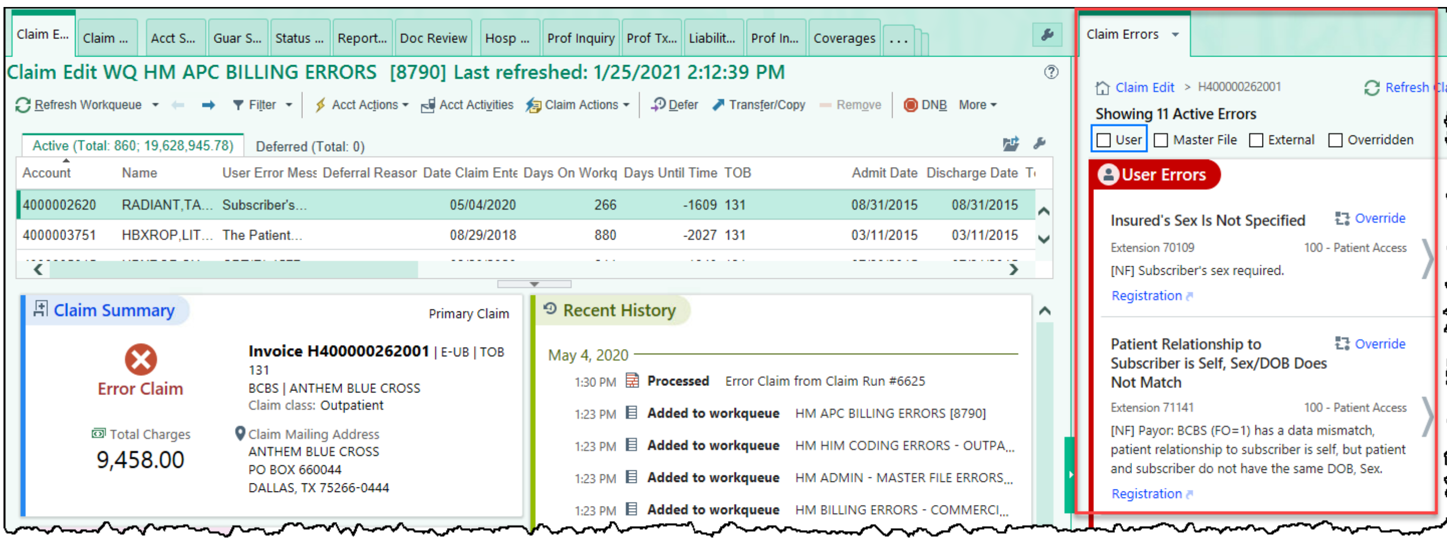
Fix Errors Faster with the Redesigned Claim Edit Assistant

Key Benefits:

- Improved workflow
- More efficient
- Less clicks

Description:

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



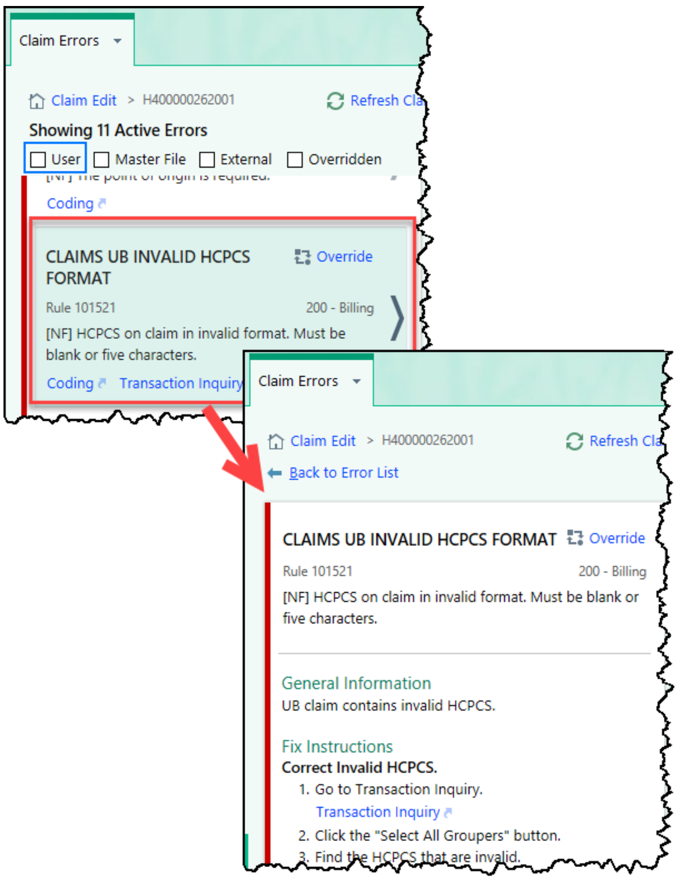
Find Fix Instructions in New Claim Edit Assistant Sidebar

Key Benefits:

- More efficient
- Less clicks

Description:

Fixing a claim? Click 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**.



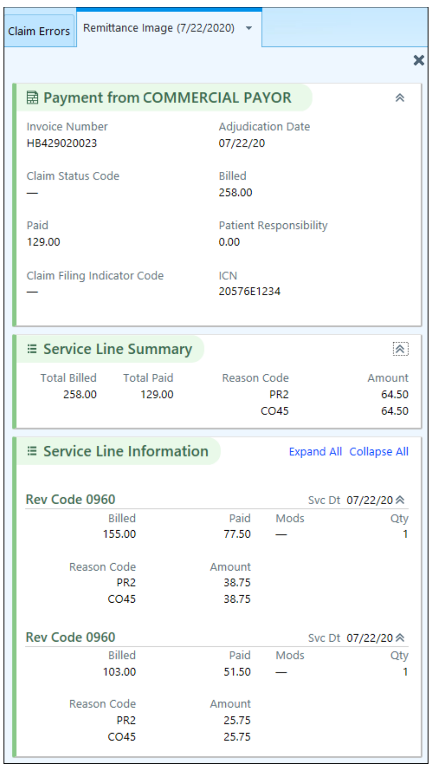
Find Information About Prior Payments in New EOB Sidebar

Key Benefits:

- Improved workflow
- Time saver
- More efficient

Description:

You can click on the **Prior Payments** link in the new **Claim Edit Assistant EOB** tab to open a sidebar with basic remittance information. Use this to help you balance EOB lines.



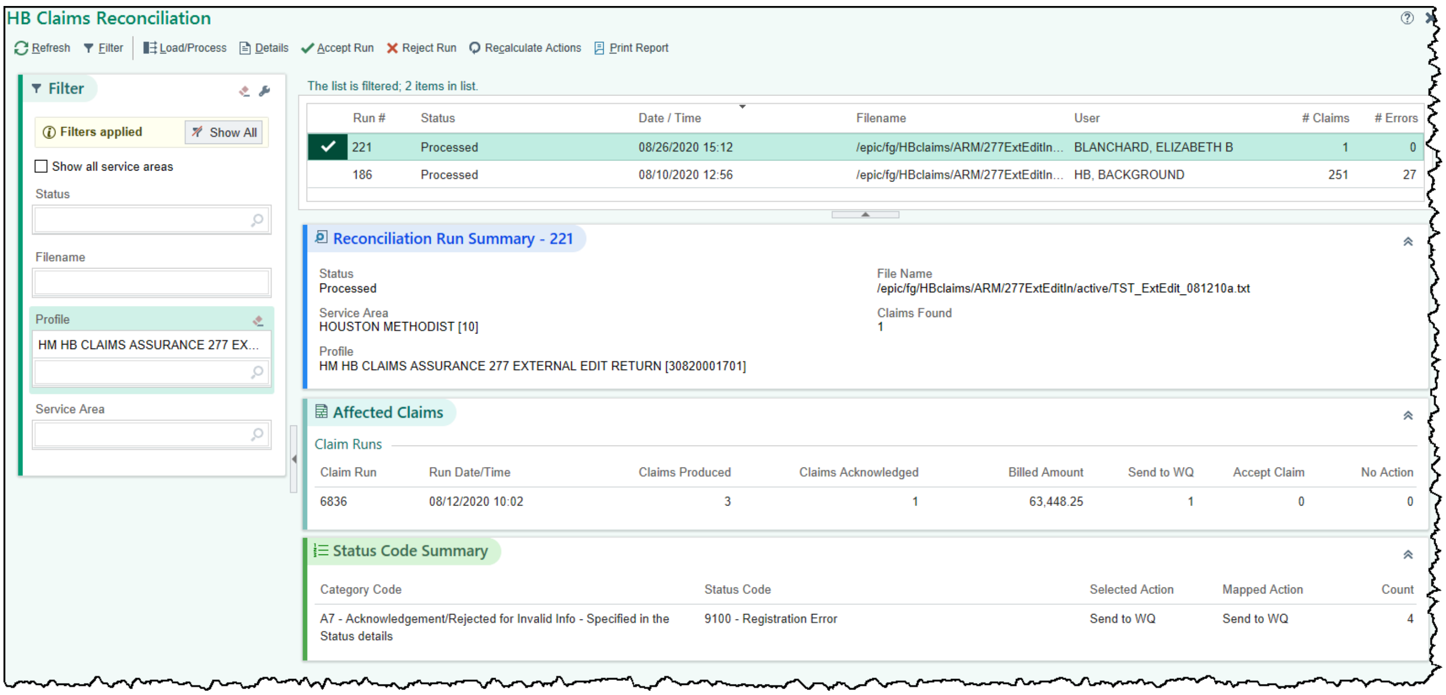
Find Comprehensive Information About Reconciliation Runs

Key Benefits:

- Time saver

Description:

The **Claims Reconciliation activity** has a whole new look, with color-coded cards that have detailed information about reconciliation runs and an easy-to-read table. You can use advanced filtering to find quickly find specific runs and be able to accept or reject multiple runs at a time.



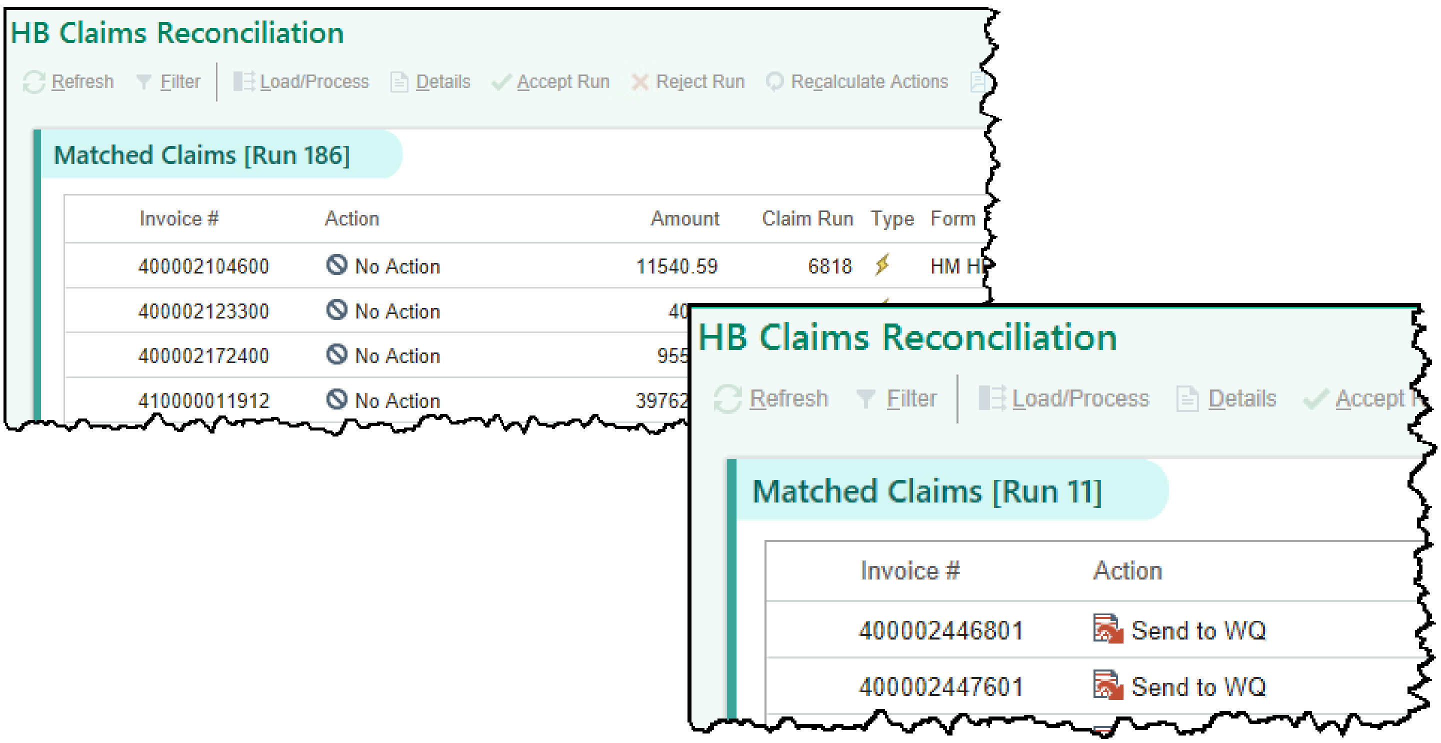
Override Claim Actions in Updated Reconciliation Run Activity

Key Benefits:

- Improved workflow

Description:

To override default claim actions before accepting reconciliation runs, click **Details** in the toolbar to see a list of invoices and then click the **No Action**, **Accept Claim**, and **Sent to WQ** buttons. Click **Recalculate Actions** to recalculate actions associated with claims based on the current build and status of those claims.



Cash Management

New Feature

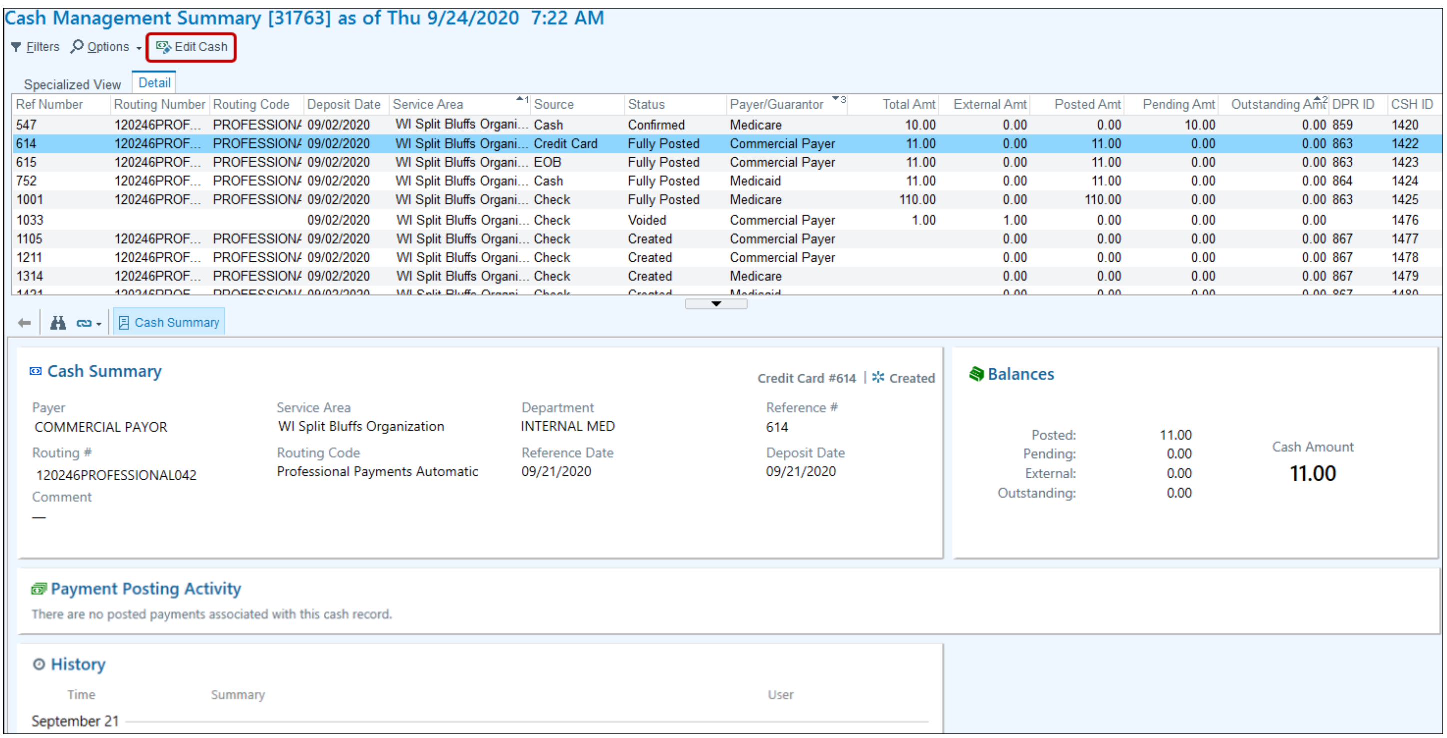
New Reports on Cash Records and Control Groups

Key Benefits:

- Financial benefit
- More accuracy and reliability

Description:

Use new reports to easily track outstanding cash records and cash control groups. Click **Edit Cash** or double-click on the rows to open the cash records.



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Time Saver

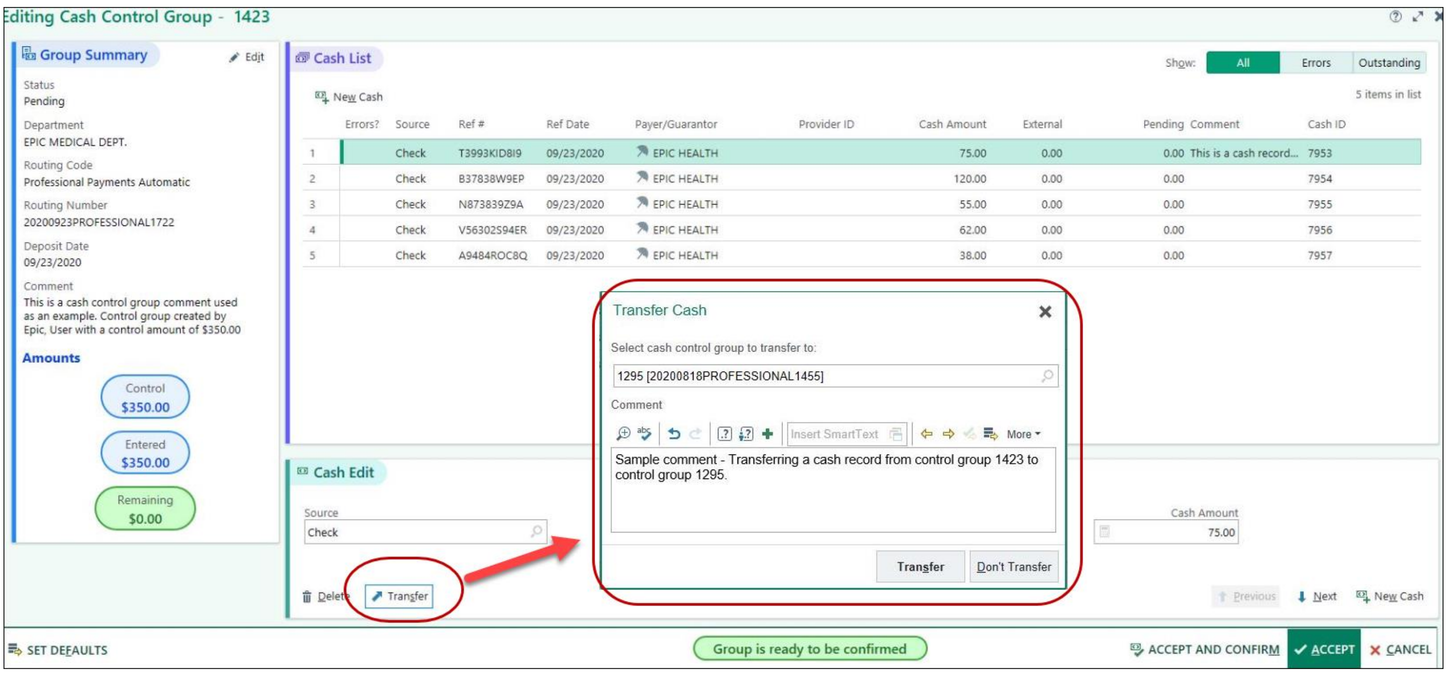
Transfer Cash Records with One Action

Key Benefits:

- Time saver

Description:

To transfer cash records from the **Edit Cash Control Group** screen, click **Transfer.** You no longer need to disassociate records before you associate them with another group.



New Feature

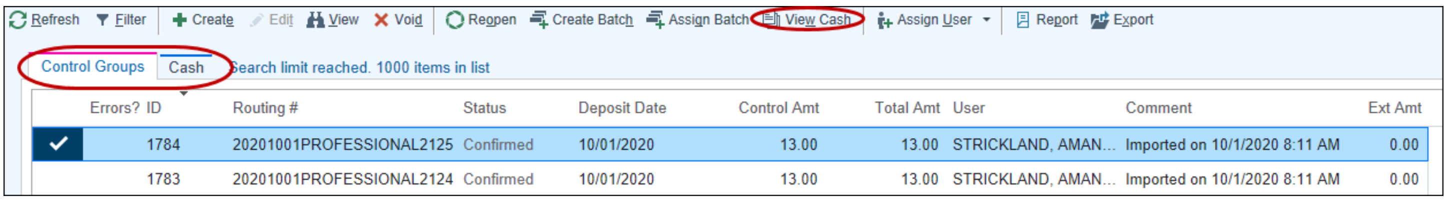
View Cash Lists and Control Groups in Cash Management

Key Benefits:

- Improved workflow

Description:

To see a list of all the cash records in a control group in the main grid of the **Cash Management activity**, click the **control group** and then click **View Cash**. To see a filterable list of all the cash records regardless of control group, click **Cash** in the top right of the main grid.



Errors?	ID	Routing #	Status	Deposit Date	Control Amt	Total Amt	User	Comment	Ext Amt
	1784	20201001PROFESSIONAL2125	Confirmed	10/01/2020	13.00	13.00	STRICKLAND, AMAN...	Imported on 10/1/2020 8:11 AM	0.00
	1783	20201001PROFESSIONAL2124	Confirmed	10/01/2020	13.00	13.00	STRICKLAND, AMAN...	Imported on 10/1/2020 8:11 AM	0.00

Insurance Follow-up

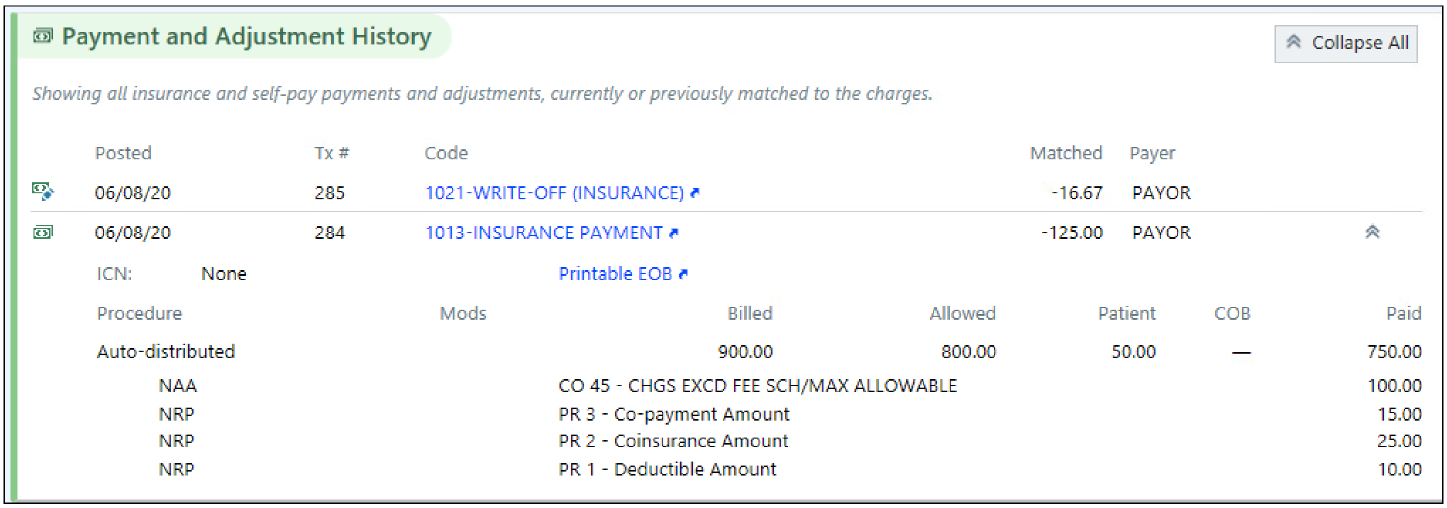
Printable EOBs Show Only Claim-Level for Auto-Distributed Payments

Key Benefits:

- More accuracy and reliability

Description:

To ensure you get the right details, you can now see only **claim-level allowed** and **coinsurance information** in EOBs for auto-distributed payments. Previously, charge-level information appeared but it was often inaccurate and unhelpful.

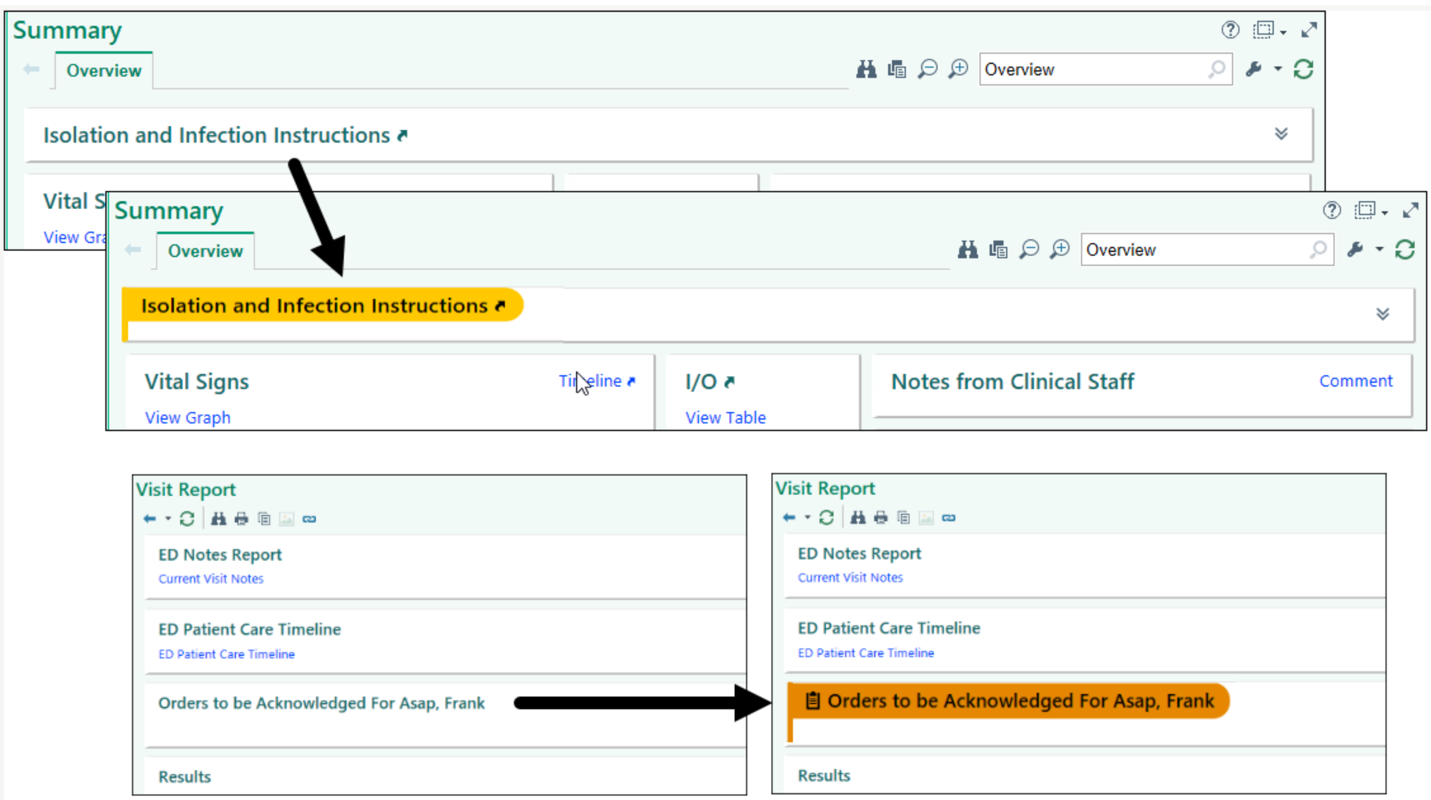


General Updates

Colored Headers for Important Information More Consistently Appear for Users with Fewer Colors Setting

Key Benefits:
- Personalizing your workflow

Description:
If you have selected the **Display Fewer Colors** setting from the **My Settings** menu in Epic, you will see more red, orange and yellow headers to call attention to important information.



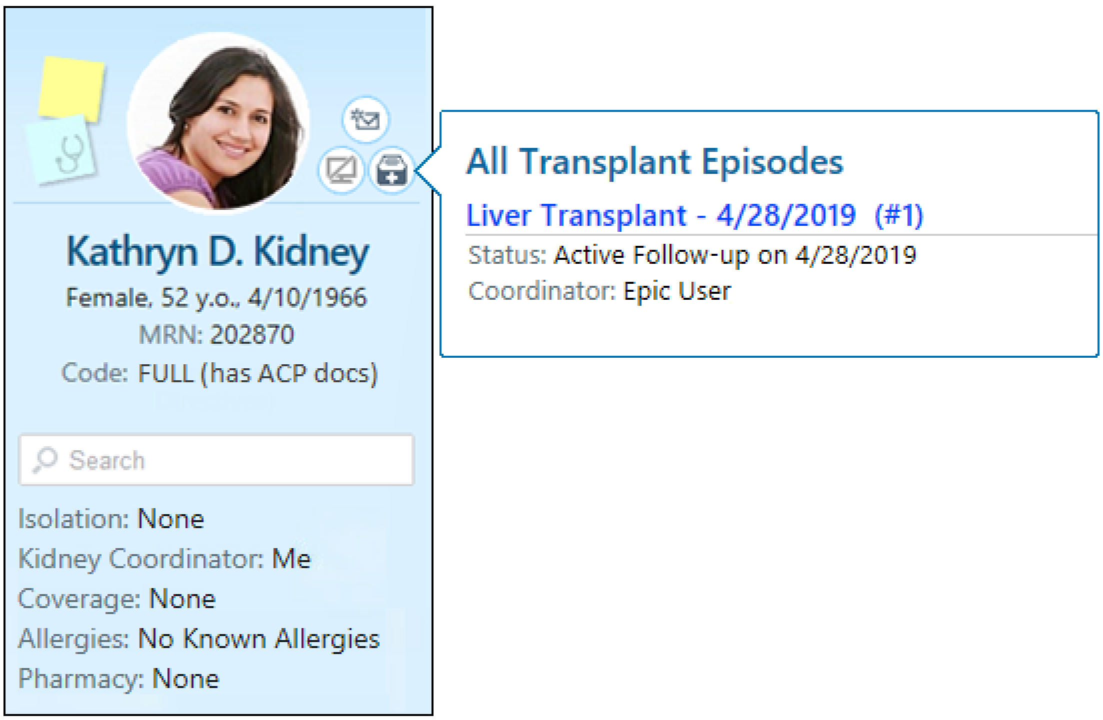
Time Saver — Hover over the Transplant Icon in Storyboard to View the Episode List

Key Benefits:

- Easily accessible in Storyboard

Description:
You do not have to click the **transplant icon** in Storyboard to see a list of your patient's transplant episodes anymore. Just hover to see the list.

How to:
Hover over the **transplant icon** to see a list of transplant episodes.

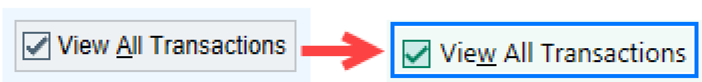


It's Easier to Tell When a Toolbar Button Is Selected

Key Benefits:

- Time saver

Description:
A check box or radio button now appears on many toolbars' buttons throughout Epic so that it's clearer when a button has been selected.

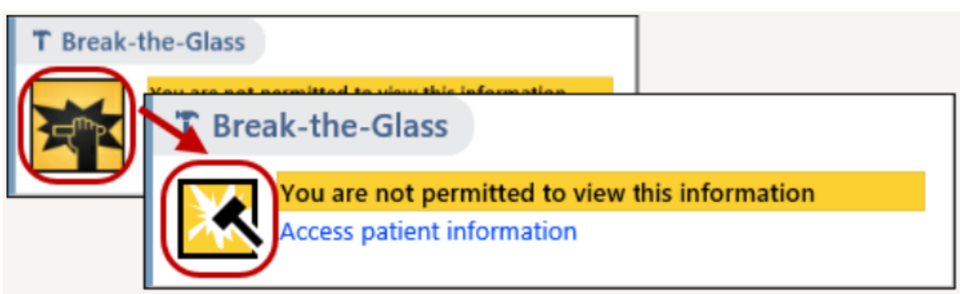


New Break-the-Glass Icon in Reports

Key Benefits:

- Time saver

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



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

Key Benefits:

- Time saver

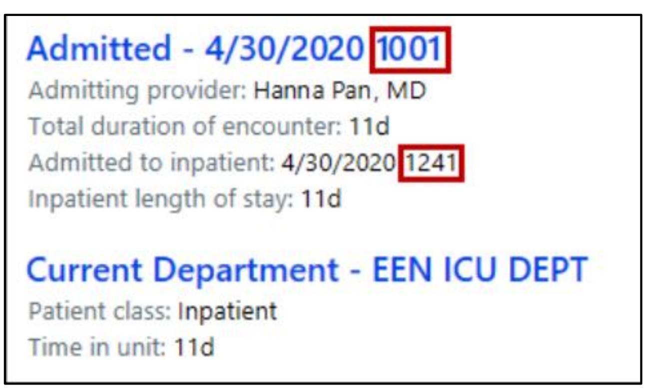
Description:
You can now easily tell when a patient is deceased. The circle containing the patient's photo or initial will be grayed out and surrounded by a black border when you open an InBasket message or the chart for a deceased patient.

See a Patient's Admission Time in Storyboard

Key Benefits:

- Time saver

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



Add SmartPhrases to your Notes Using SmartLists

Key Benefits:

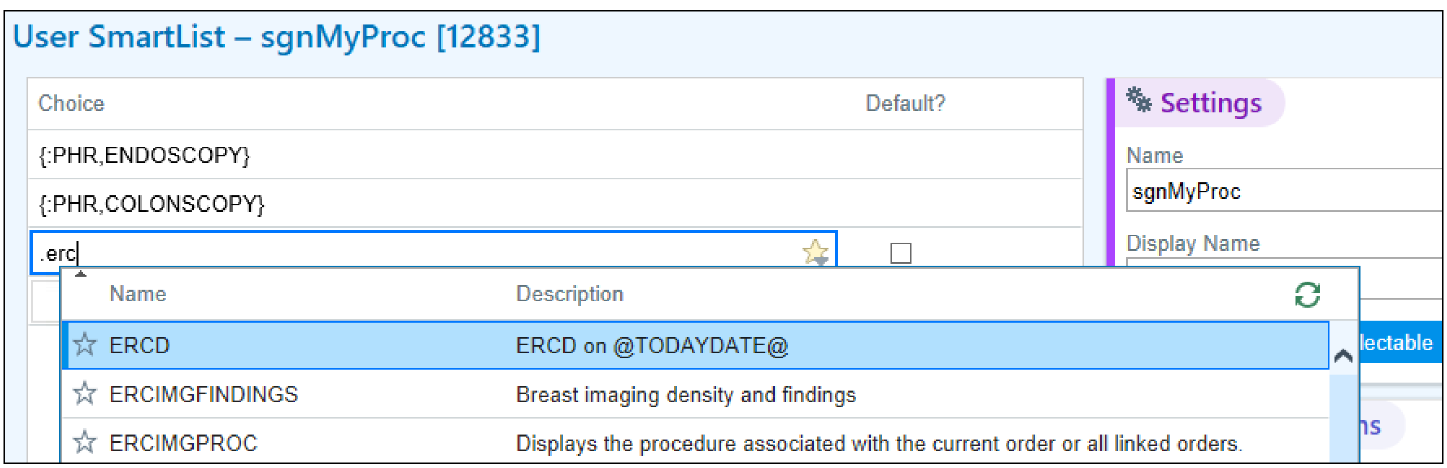
- Personalizing your workflow.

Description:

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

How to:

1. In Epic, go to the **SmartList Editor** (search: SmartList) and create a SmartList. If you have the security to create system SmartLists, you need to 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 **List Phrases.**
   c. Find and add the SmartPhrase you want to include by clicking **Add to Text.**
4. To select a SmartPhrase from a user 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 in the SmartList to save your selection and move to the next wildcard or SmartList.



MyChart's New Home Page

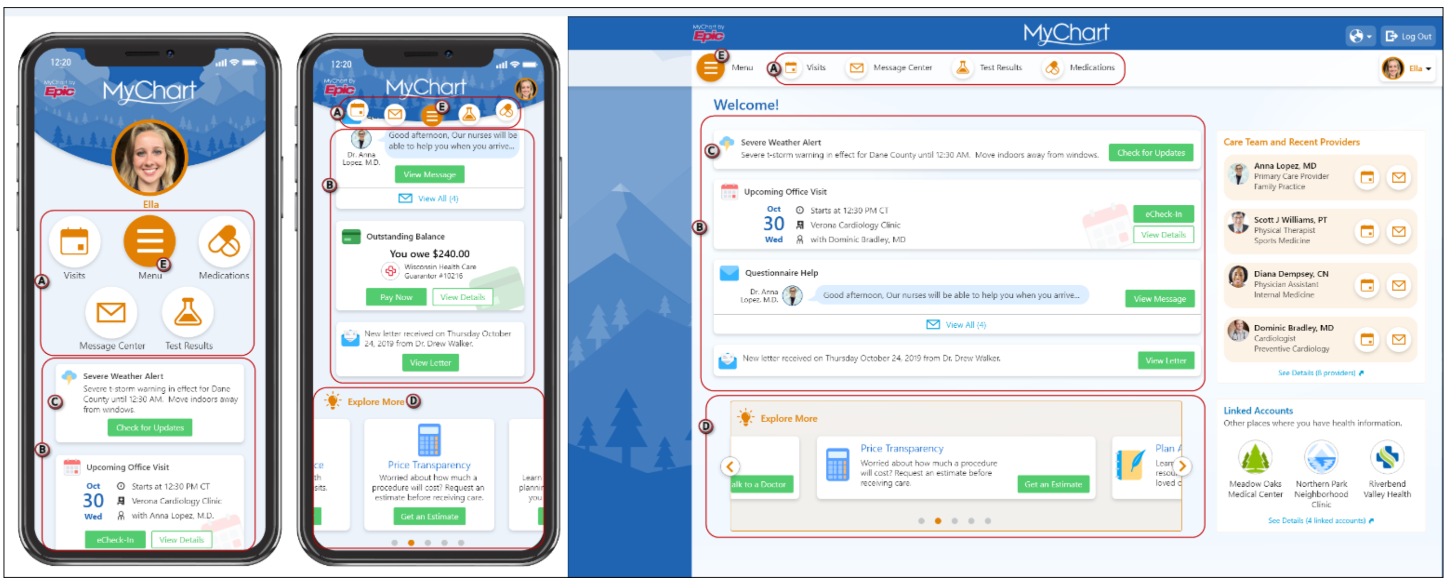
Key Benefits:

- Improved workflow
- More efficient

View the New MyChart Experience video.

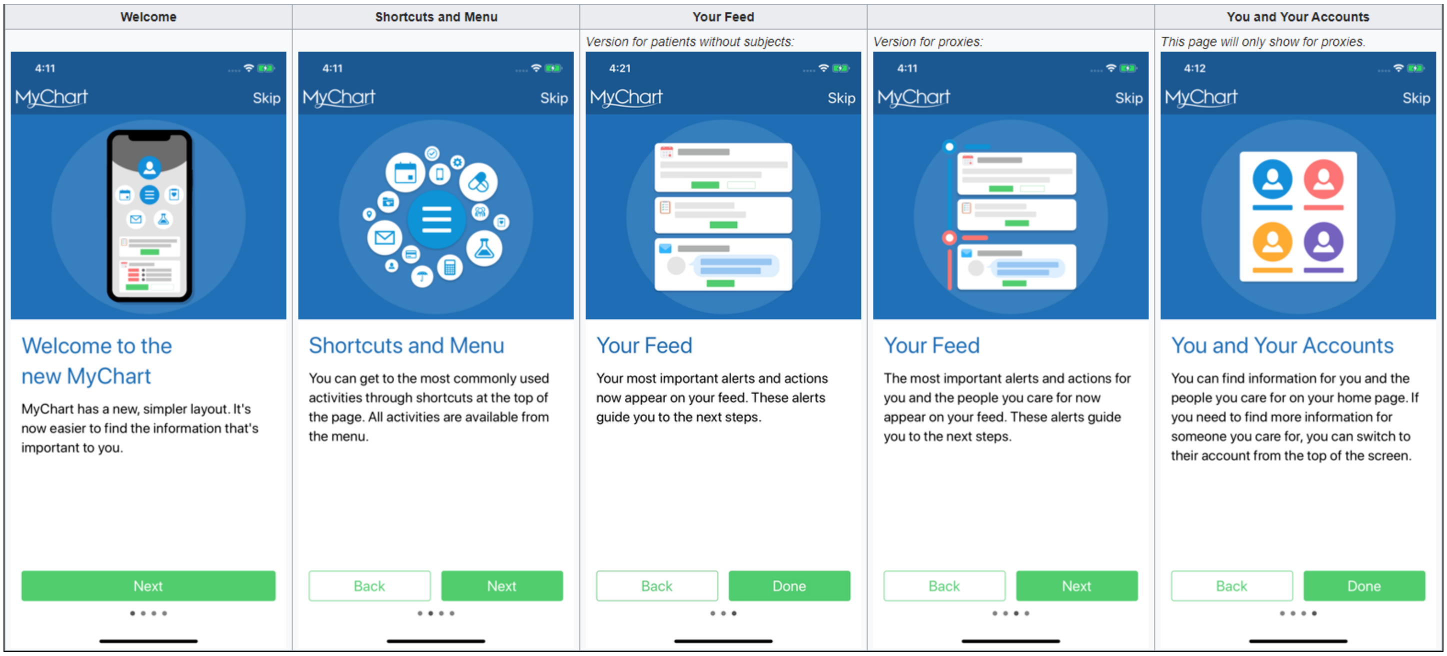
Description:
The **MyChart** homepage and user experience is being redesigned to make it cleaner and easier to use. All features and functionality are available on both the web and mobile app platform. The new design provides shortcuts to common activities and an actionable list of updates for the patient.

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.

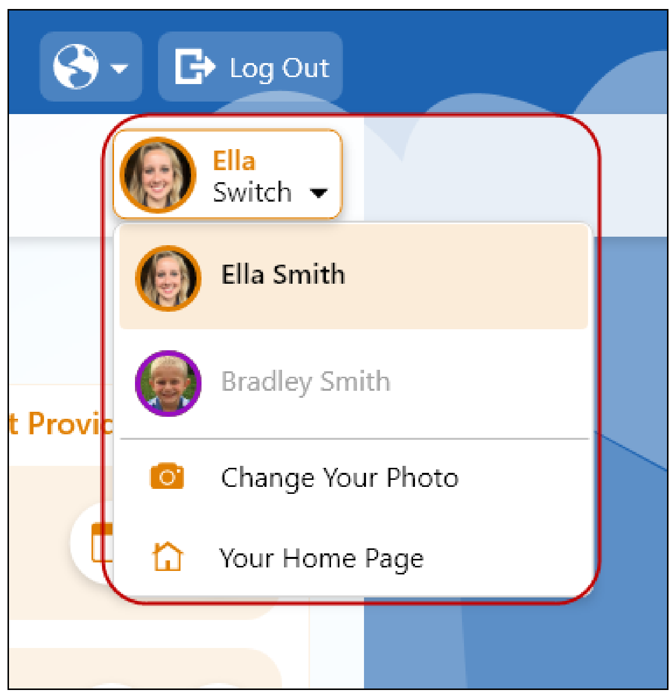


A. Shortcuts on the homepage provide easy access to the four activities a patient uses the most.
B. The **health feed** is a consolidated view of actionable health updates, including appointment reminders, check-in tasks and messages from the patient's care team.
C. Information for proxies and patients for which they have proxy access, appear in the same feed (color-coded by person). Proxies can select a patient from the **proxy menu** to go to that patient's chart.
D. The **Explore More** section highlights specific functionality and directs 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 Desktop Login Page

Key Benefits:

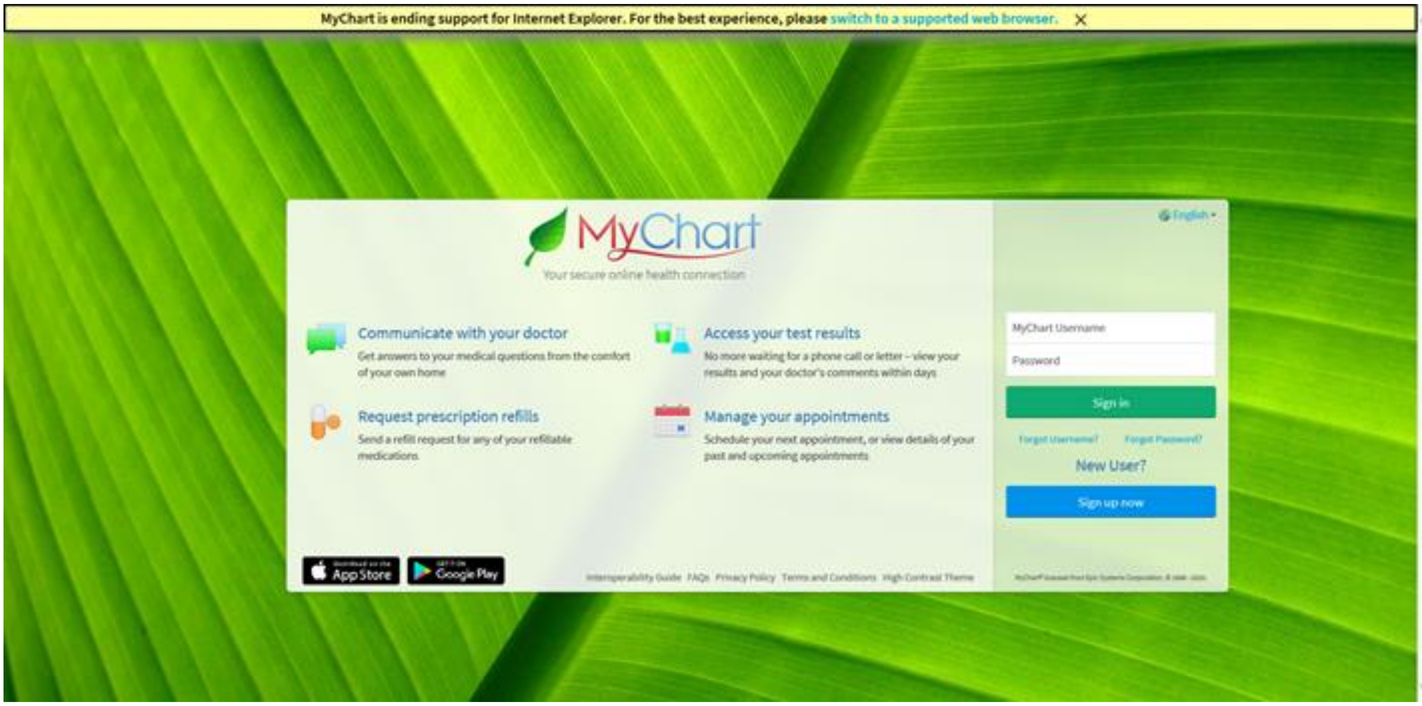
- More accuracy and reliability

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
MyChart Username
Password
Sign in
New User?
Sign up now
App Store
Google Play
Interoperability Guide FAQs Privacy Policy Terms and Conditions High Contrast Theme

Users Can No Longer Mark ABNs as Void

Key Benefits:

- Improved workflow

Description:

Manually voiding an ABN is no longer an option. Instead, Epic will automatically void ABNs.