

Feb. 21 Epic *Update Companion*



Hospital Billing Central Business Office Staff

Updated: 1/28/21

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:

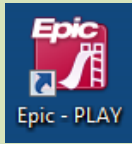
- Charge Description Master Coordinator
- Billers
- Follow-up Representatives

Top Changes for Role/Department:

1. [Claim Edit Workqueues receive a major makeover.](#)
2. [Paste Like a Pro in Hospital Account Lookup.](#)
3. [Quickly review and act on transactions.](#)
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.



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: hbadm

Playground Password: **epic**

Key workflows for you to practice include:

- Open an account from Account Maintenance, click the Hosp Tx Inquiry tab, and explore the updated screen.
- Open a claim edit workqueue and explore Storyboard, Details, and the Claim Edit sidebar.
- Search for Hospital Account Lookup and paste a copied set of account IDs from an Excel spreadsheet to find the accounts' details in Epic.



Account Maintenance



Paste Like a Pro in Hospital Account Lookup

Key Benefits:

- More efficient
- Time saver

[Watch a brief video on this functionality.](#)

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

Patient

Guarantor

Invoice #

Tx Ref #

taylor

Filters

Date Range

3/25/2020

9/24/2020

Account Status

☒ Open
 ☒ DNB
 ☒ Billed
 ☐ Closed
 ☐ Combined
 ☐ Voided

Account Type

☒ HB
 ☒ PB
 ☐ Default

Reset Filters

Search Again

Selected Accounts (4)

Recent

Search Results

You searched for account: **taylor**

All 17 records loaded

Select All

Unselect All

ID	Patient Name	Type	Guar Type	Location	Class	Status	Primary Payer	Adm Date	Dis Date	Balance
4000001598	TAYLOR,APPLE	P/F	P/F	WI HARBOR BLUFF...	Inpatient	OPEN	Self-pay	06/25/2020		0.00
61402	TAYLOR,CHRIS	P/F	P/F	WI HOME HEALTH S...	HH Alternate...	DNB (DNB Error)	Self-pay	08/03/2020	08/31/2020	0.00
71829	TAYLOR,CHRIS	P/F	P/F	WI HOME HEALTH S...	HH Alternate...	OPEN	Self-pay	09/01/2020		0.00
100000510	TAYLOR,ELIJAH A	P/F	P/F	WI Delta Main Hospital	Outpatient	BILLED	HB MEDICARE	05/07/2020	05/07/2020	3,219.54
<input checked="" type="checkbox"/> 4000006726	TAYLOR,HEATH	P/F	P/F	WI Split Bluffs Hospital	Inpatient	BILLED	BLUE CROSS BLU...	07/21/2020	07/24/2020	2,245.67
<input checked="" type="checkbox"/> 4000006733	TAYLOR,HEATH	P/F	P/F	WI Split Bluffs Hospital	Outpatient	BILLED	BLUE CROSS BLU...	07/24/2020	07/24/2020	344.11
<input checked="" type="checkbox"/> 4000013443	TAYLOR,HEATH	P/F	P/F	WI Split Bluffs Hospital	Inpatient	DNB	BLUE CROSS BLU...	09/17/2020	09/17/2020	0.00
<input checked="" type="checkbox"/> 4000013465	TAYLOR,HEATH	P/F	P/F	WI Split Bluffs Hospital	Inpatient	BILLED	BLUE CROSS BLU...	09/17/2020	09/17/2020	39,787.40
47238	TAYLOR,LIME	P/F	P/F	ESC SA Melbourne	Inpatient	OPEN	Self-pay	07/02/2020		0.00
49836	BAUMAN,TAYLOR	P/F	P/F	TBAUMAN SERVICE...	Inpatient	OPEN	Self-pay	07/07/2020		0.00

Accept

Cancel





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.

The screenshot shows the 'Authorization/Certification for Smith, Jenny' window. On the left, the 'Auth/Cert' tab is selected. The main toolbar contains several buttons: 'Account Maintenance' (highlighted with a red box), 'Open Chart', 'Triage', 'Appt Desk', 'Apply Template', 'Account Activities', 'View Notes', and 'Benefit Collection'. Below the toolbar, the patient's name 'Smith, Jenny' is displayed. To the right, there is an 'Auth/Cert ID' input field. At the bottom, administrative dates and times are listed: 'Adm Date: 11/8/2013', 'IP Adm Date: 11/8/2013', 'Adm Time: 11:43 PM', and 'IP Adm Time: 11:43 PM'.



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	
<div> <div>Select All</div> <div>Deselect All</div> <div>Filters</div> </div> <div> Group by: Revenue Code CPT®/HCPCS Code Svc Date Svc Date - Px Other </div>						
					<input type="checkbox"/> Show Cost	
Revenue Code	Description	Qty			Total Amount	
<input type="checkbox"/> 0260	IV THERAPY - GENERAL	3			344.09	
<input type="checkbox"/> 0276	MEDICAL/SURGICAL SUPPLIES AND DEVICES - INTRAOCULAR LENS (IOL)	1			287.72	
<input type="checkbox"/> 0303	LABORATORY - RENAL PATIENT (HOME)	1			196.17	
<input type="checkbox"/> 0319	LABORATORY PATHOLOGICAL - OTHER	1			320.27	
<input type="checkbox"/> 0324	RADIOLOGY - DIAGNOSTIC - CHEST X-RAY	1			121.31	
<input type="checkbox"/> 0480	CARDIOLOGY - GENERAL	1			294.47	
<input type="checkbox"/> 0482	CARDIOLOGY - STRESS TEST	1			281.57	

Adjustments							Total (3) -2,713.92
<div> <div>Reverse</div> <div>Transfer</div> </div>							
HTR ID	Svc Date	Post Date	Procedure	Payer	Source	Amount	
<input type="checkbox"/> 940393	09/23/2019	09/23/2019	1362003-SELF PAY CREDIT ADJUSTMENT	—	—	-1,509.49	
<input type="checkbox"/> 940394	09/23/2019	09/23/2019	55608-CHARITY ADJUSTMENT	—	—	-766.29	
<input type="checkbox"/> 940395	09/23/2019	09/23/2019	55609-ADMINISTRATIVE ADJUSTMENT	—	—	-438.14	



New
Look



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.

Hospital Adjustment Posting

Adj code: Date: Payer: Ctrl amt:

Comment:

Invoice	Account Name	Payer	Disch Dt	Ref #	Post Amt	Balance	Not Allwd Adj?
1 Z09977	DUNN,AIDAN [26084]	LNT PAYER [1838200]	6/14/2018		100.00	15094.60	No
2 Z11042	DUNN,SAOIRSE [40334]	LNT PAYER [1838200]	6/27/2019		500.00	2053.96	No
3 122449***	DUNN,AISLING [122449]	LNT PAYER [1838200]	10/25/2019		400.00	3243.60	No
4							

Surcharge assignment: Session posted: Session remaining:

Line 3 comment:

Invoice info:





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.





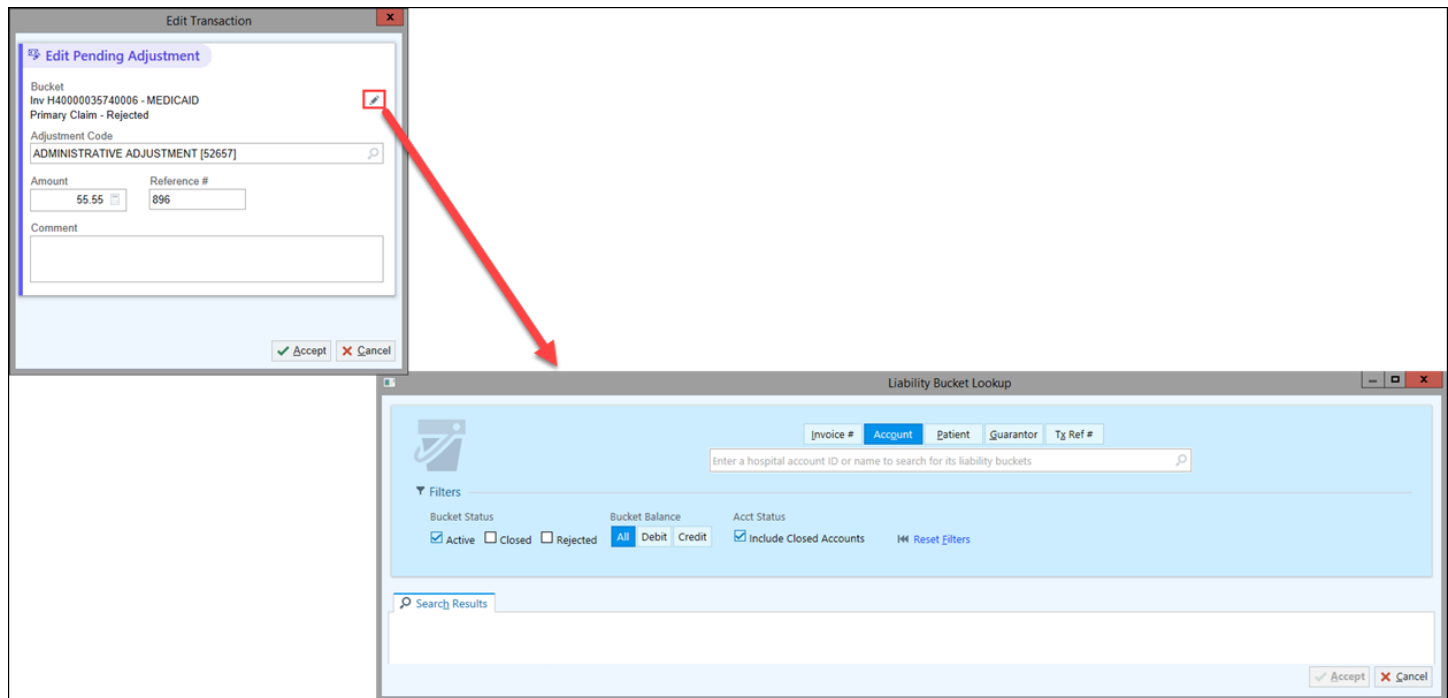
Get More Precise with Your Adjustment Edits in Liability Bucket Lookup

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



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.

80500 - PR LAB PATHOLOGY CONSULT-LTD
Workqueue - PB HOLD FOR ENCOUNTER CLOSE [1548]
EpicCare Ambulatory (Charge Capture Navigator)

Encounter
Registration
Patient Station

WEST, LYDIA
Legal sex: Female
Date of birth: 7/2/1975
MRN: 205128

Office Visit
7/2/2020
Physician Family Medicine, MD
Bill area: FAMILY MED BILL AREA
No Place of Service

Diagnoses

Line 1: J11.00 - Influenza due to unidentified influenza virus with unspecified type of pneumonia
Line 2:

Summary
ID: 152773

Procedure: 80500 - PR LAB PATHOLOGY CONSULT-LTD
Default Code: 80500 (CPT*)
Service Date: 7/2/2020
Department: EMC FAMILY MEDICINE
Modifier: 26
Qty: 1

Error Message: PB HOLD UNTIL THE ENCOUNTER IS CLOSED [165378]

Place of Service: EHS CLINIC
Location: EHS CLINIC
Service Area: EHS SERVICE AREA
Service Provider: Physician Family Medicine, MD [E1000]
Billing Provider: Physician Family Medicine, MD [E1000]
Created User: Physician Family Medicine, MD [FAMMD]
Comment:

Financial
Price

Guarantor Account: WEST,LYDIA [3668]
Hospital Account:
Coverage: AETNA/AETNA PPO
Expected Price: 36.00

Bill Area: FAMILY MED BILL AREA
Encounter Specialty: Family Medicine
Do Not Bill Insurance: No
PB Visit: 1

Cost Center: EMH UNASSIGNED CC [99901]
Cost Center Department: EMC FAMILY MEDICINE [10501101]
Revenue Code Override:

Cost
☐ Collapse by Default





- Improved workflow

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.

Batch 21
EHS SERVICE AREA

User: PB_ADMIN
Sessions: 7

Px count: 12 / 12
Px hash: 992431 / 992431

Dx hash: 2176148 / 2176148
Prov hash: 645578 / 789002

Batch Entry

Charge Entry Batch - 21 (Open)

Batch Info

Summary

Service Area
EHS SERVICE AREA (10)

Comment
—

Control Amounts

	Control	Current	Difference
Procedure hash:	992431	992431	0
Procedure count:	12	12	0
Service provider hash:	789002	645578	-143424
Diagnosis hash:	2176148	2176148	0
Charge amount:	—	0.00	—

Sessions

New Session

Edit Session

Delete Session

#	Patient	Contact	Guarantor	Hospital Account	Posting User
7	DEVINE, COLIN A	09/04/2020			PB, ADMIN
6	BERRY, STEPHANIE	09/04/2020	2069 - BERRY, STEPHANIE		PB, ADMIN
5	CLARKSON, LAUREN	09/04/2020	2071 - CLARKSON, LAUREN		PB, ADMIN
4	BUCHHOLZ, TREVOR	08/20/2020	2266 - BUCHHOLZ, TREVOR		PB, ADMIN
3	SMITH, WILLIAM A	09/04/2020	500000025 - SMITH, WILLIAM A		PB, ADMIN
2	SIMS, ERIC	09/04/2020	980 - SIMS, ERIC	2 - SIMS, ERIC	PB, ADMIN
1	YARBOROUGH, MORTICIA	09/04/2020	2603 - YARBOROUGH, MORTICIA		PB, ADMIN

Charges for Session #1

#	Code	Procedure	Svc Date	Mod	Svc Provider	Cost Center	Department	Qty
1	82003 (CPT®)	PR ASSAY ACETAMINOPHEN	09/04/2020		FAMILY MEDICINE, PHYSIC...	99901 - EMH UNASSIGNED...	EMC FAMILY MEDICINE	1
2	84080 (CPT®)	PR ASSAY ALKAL PHOSPH...	09/04/2020		FAMILY MEDICINE, PHYSIC...	99901 - EMH UNASSIGNED...	EMC FAMILY MEDICINE	10
3	82373 (CPT®)	PR ASSAY CARBOHYDRAT...	09/04/2020	26	FAMILY MEDICINE, PHYSIC...	99901 - EMH UNASSIGNED...	EMC FAMILY MEDICINE	1
4	82523 (CPT®)	PR ASSAY FOR COLLAG...	09/04/2020		FAMILY MEDICINE, PHYSIC...	99901 - EMH UNASSIGNED...	EMC FAMILY MEDICINE	1

Batch Report

Batch is not balanced

Reject Batch

Close Batch

Process Batch



Claims



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.

Claim Edit WQ HM APC BILLING ERRORS [8790] Last refreshed: 1/25/2021 2:12:39 PM

Refresh Workqueue Filter Acct Actions Acct Activities Claim Actions Defer Transfer/Copy Remove DNE More

Active (Total: 860; 19,628,945.78) Deferred (Total: 0)

Account	Name	User Error Mess	Deferral Reasor	Date Claim Ente	Days On Workq	Days Until Time	TOB	Admit Date	Discharge Date	Ti
4000002620	RADIANT,TA...	Subscriber's...		05/04/2020	266	-1609	131	08/31/2015	08/31/2015	
4000003751	HBXROP,LIT...	The Patient...		08/29/2018	880	-2027	131	03/11/2015	03/11/2015	

Claim Summary

Primary Claim

Error Claim

Invoice H400000262001 | E-UB | TOB 131
BCBS | ANTHEM BLUE CROSS
Claim class: Outpatient

Total Charges
9,458.00

Claim Mailing Address
ANTHEM BLUE CROSS
PO BOX 660044
DALLAS, TX 75266-0444

Recent History

May 4, 2020

- 1:30 PM **Processed** Error Claim from Claim Run #6625
- 1:23 PM **Added to workqueue** HM APC BILLING ERRORS [8790]
- 1:23 PM **Added to workqueue** HM HIM CODING ERRORS - OUTPA...
- 1:23 PM **Added to workqueue** HM ADMIN - MASTER FILE ERRORS...
- 1:23 PM **Added to workqueue** HM BILLING ERRORS - COMMERCI...
- 1:23 PM **Added to workqueue** HMM REGISTRATION ERRORS - ALL...

System

Context

Form	Payer
HM HB CEV 837 V5010	BCBS [100000]
INSTITUTIONAL [30890401]	
Plan	Place of Service
ANTHEM BLUE CROSS [10000001]	HMM HOSPITAL OP POS [1000140]
Location	Department
HMM PARENT [10400]	HMM MAIN NUC MED [104001080]

Claim Processing

CLP ID	CEV ID
106129	114528
Claim Definition	Submitted Lines
HM HB BLUE CROSS BLUE SHIELD CDF	All Lines
[30821001011]	

Demand Claim? Current Queue

Claim Edit Workqueues

Workqueue	Days
HM ADMIN - CATCH ALL QUEUE [7773]	266
HMM REGISTRATION ERRORS - ALL PAYORS [7779]	266
HM BILLING ERRORS - COMMERCIAL PRIMARY [7782]	266
HM ADMIN - MASTER FILE ERRORS [7787]	266
HM HIM CODING ERRORS - OUTPATIENT [7867]	266
HM APC BILLING ERRORS [8790]	266





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.

Claim Edit WQ HM BILLING ERRORS - COMMERCIAL PRIMARY [7782] Last refresh

Edits

Claim Errors

Bucket Type	Payer	Total Errors
Primary Claim	CIGNA [600006]	13

Billing Indicators

Billing Indicator	Added	Added By
HM AARC No Response - Needs Intervention [2001]	10/16/2019 0040	HB, BACKGROUND
HM THCIC Extract Eligible [123]	04/07/2017 0030	HB, BACKGROUND
Past Filing Deadline Write Off [600]	04/06/2017 0030	HB, BACKGROUND

Workqueues

Account Workqueues

Workqueue	Primary User	Status	Added On	Days on WQ	System Comment
HM PFD NOT CODED ELIGBL...	—	Active	05/04/2018	1187	—

Claim Edit Workqueues

Workqueue	Primary User	Status	Added On	Days on WQ	System Comment
HM ADMIN - CATCH ALL QU...	HB, ADMIN	Active	05/04/2020	266	Qualified for queue
HMH REGISTRATION ERRORS...	ADT, PATIENT...	Active	05/04/2020	266	Qualified for queue
HM BILLING ERRORS - COM...	HB, BILLER	Active	05/04/2020	266	Qualified for queue
HM ADMIN - MASTER FILE E...	HB, ADMIN	Active	05/04/2020	266	Qualified for queue
HM HIM CODING ERRORS - I...	HIM CODING...	Active	05/04/2020	266	Qualified for queue

Patient Workqueues





Fix Errors Faster with the Redesigned Claim Edit Assistant

Key Benefits:

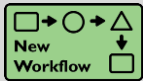
- Improved workflow
- More efficient
- Less clicks

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.

The screenshot displays the Claim Edit Assistant interface. At the top, there's a navigation bar with tabs like Claim E..., Claim ..., Acct S..., Guar S..., Status ..., Report..., Doc Review, Hosp ..., Prof Inquiry, Prof Tx..., Liabilit..., Prof In..., Coverages, and more. Below this, a header indicates 'Claim Edit WQ HM APC BILLING ERRORS [8790] Last refreshed: 1/25/2021 2:12:39 PM'. A table lists active errors with columns for Account, Name, User Error Mess, Deferral Reasor, Date Claim Ente, Days On Workq, Days Until Time, TOB, Admit Date, and Discharge Date. Two errors are visible: one for account 4000002620 (RADIANT,TA...) and another for 4000003751 (HBXROP,LIT...). Below the table, there's a 'Claim Summary' section showing an 'Error Claim' for invoice H400000262001, with a total charge of 9,458.00. To the right, a 'Recent History' section shows a list of actions taken on the claim. On the far right, a 'Claim Errors' sidebar is open, displaying 'Showing 11 Active Errors' and listing two specific errors: 'Insured's Sex Is Not Specified' and 'Patient Relationship to Subscriber is Self, Sex/DOB Does Not Match'. Each error has an 'Override' button and a 'Registration' link.





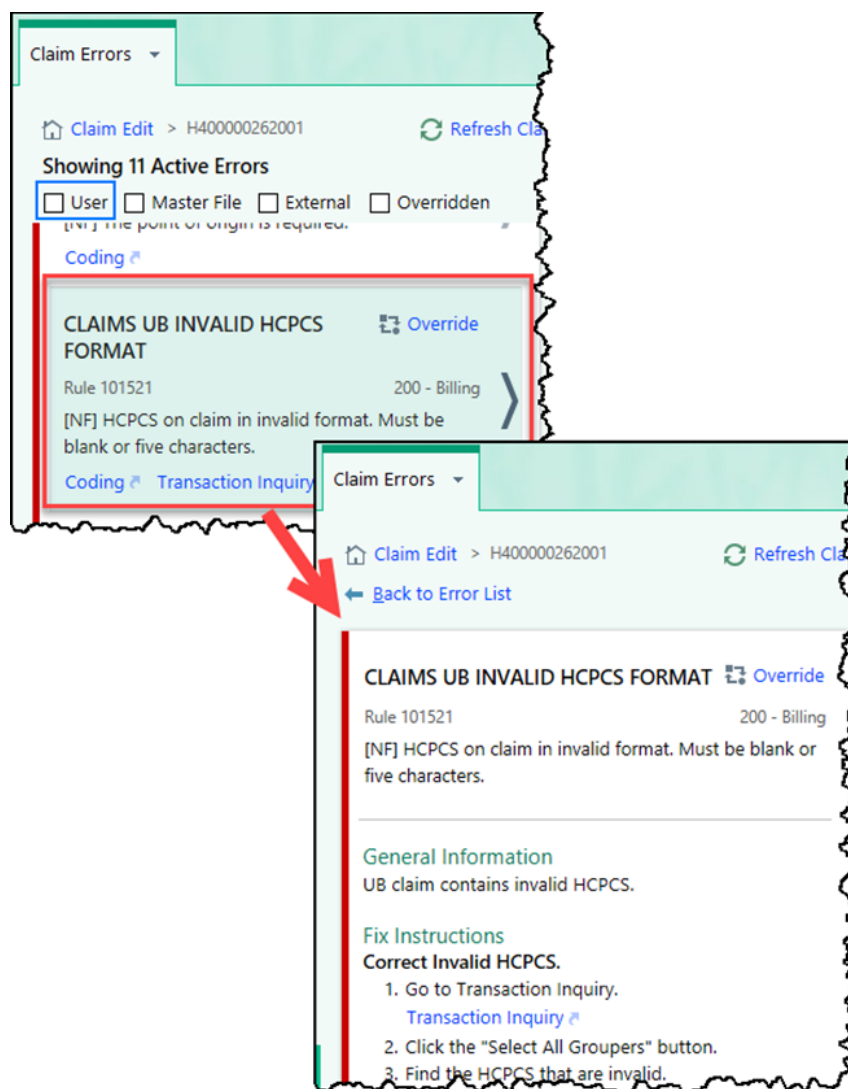
Find Fix Instructions in New Claim Edit Assistant Sidebar

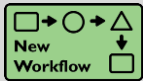
Key Benefits:

More efficient

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**.





Quickly Balance EOB Lines in the Claim Edit Assistant

Key Benefits:

- More efficient
- Less clicks
- Time saver

Description:

The **EOB** tab in the **Claim Edit Assistant** has a new built-in editor, as well as a new sidebar that you can use to see information about payments. The new tab helps you quickly balance EOB lines for secondary and tertiary claims.

Account: RADIANT, SIERRATHREE M. Invoice: H400000167902 Payer: CIGNA Form: (E) HM HB CEV 837 ...

Summary Paper Image Electronic Image History **EOB**

Explanation of Benefits from Prior Payer: UHC

Claim Level Information

Claim Billed	Claim Paid	Contract	Claim Adjustments	Line Paid	Line Adjustments	Total Adjustments	Claim Unbalanced Amount
16,865.00	—	—	—	0.00	0.00	0.00	16,865.00

Service Line Information

Code	Service Date	Modifiers	Billed	Paid
Ln:1 361 37225	08/26/2015	TC,LT	16,865.00	—

16,865.00 Claim Billed
 — 0.00 Claim Paid
 — 0.00 Claim Adjustments
 — 0.00 Line Adjustments
 16,865.00 Claim Unbalanced Amount

Edit EOB

Editing EOB for UHC - Service Line 1 (361 on 8/26/2015)

Paid: [] Group Code [] Reason Code [] Amount [] Quantity []

Contract: []

Adjudication date: []

Account: RADIANT, SIERRATHREE M. Invoice: H400000167902 Payer: CIGNA Form: (E) HM HB CEV 837 ...

Summary Paper Image Electronic Image History **EOB**

Explanation of Benefits from Prior Payer: UHC

Claim Level Information

Claim Billed	Claim Paid	Contract	Claim Adjustments	Line Paid	Line Adjustments	Total Adjustments	Claim Unbalanced Amount
16,865.00	—	—	—	0.00	0.00	0.00	16,865.00

Service Line Information

Code	Service Date	Modifiers	Billed	Paid
Ln:1 361 37225	08/26/2015	TC,LT	16,865.00	—

16,865.00 Claim Billed
 — 0.00 Claim Paid
 — 0.00 Claim Adjustments
 — 0.00 Line Adjustments
 16,865.00 Claim Unbalanced Amount

Edit EOB

Editing EOB for UHC - Claim level

Paid: [] Group Code [] Reason Code [] Amount [] Quantity []

Contract: []

Non-covered: []

Adjudication date: []

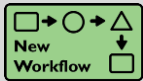
Claim

Switch between the Claim and the Service Line EOB editor in two locations.

Claim

Accept Cancel





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.

Claim Errors
Remittance Image (7/22/2020)

Payment from COMMERCIAL PAYOR

Invoice Number
HB429020023

Adjudication Date
07/22/20

Claim Status Code
—

Billed
258.00

Paid
129.00

Patient Responsibility
0.00

Claim Filing Indicator Code
—

ICN
20576E1234

Service Line Summary

Total Billed	Total Paid	Reason Code	Amount
258.00	129.00	PR2	64.50
		CO45	64.50

Service Line Information
Expand All Collapse All

Rev Code 0960
Svc Dt: 07/22/20

Billed	Paid	Mods	Qty
155.00	77.50	—	1

Reason Code
PR2
CO45

Amount
38.75
38.75

Rev Code 0960
Svc Dt: 07/22/20

Billed	Paid	Mods	Qty
103.00	51.50	—	1

Reason Code
PR2
CO45

Amount
25.75
25.75



Cash Management



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.

Cash Management Summary [31763] as of Thu 9/24/2020 7:22 AM

Filters Options **Edit Cash**

Specialized View **Detail**

Ref Number	Routing Number	Routing Code	Deposit Date	Service Area	Source	Status	Payer/Guarantor	Total Amt	External Amt	Posted Amt	Pending Amt	Outstanding Amt	DPR ID	CSH ID
547	120246PROF...	PROFESSION/	09/02/2020	WI Split Bluffs Organi...	Cash	Confirmed	Medicare	10.00	0.00	0.00	10.00	0.00	859	1420
614	120246PROF...	PROFESSION/	09/02/2020	WI Split Bluffs Organi...	Credit Card	Fully Posted	Commercial Payer	11.00	0.00	11.00	0.00	0.00	863	1422
615	120246PROF...	PROFESSION/	09/02/2020	WI Split Bluffs Organi...	EOB	Fully Posted	Commercial Payer	11.00	0.00	11.00	0.00	0.00	863	1423
752	120246PROF...	PROFESSION/	09/02/2020	WI Split Bluffs Organi...	Cash	Fully Posted	Medicaid	11.00	0.00	11.00	0.00	0.00	864	1424
1001	120246PROF...	PROFESSION/	09/02/2020	WI Split Bluffs Organi...	Check	Fully Posted	Medicare	110.00	0.00	110.00	0.00	0.00	863	1425
1033			09/02/2020	WI Split Bluffs Organi...	Check	Voided	Commercial Payer	1.00	1.00	0.00	0.00	0.00		1476
1105	120246PROF...	PROFESSION/	09/02/2020	WI Split Bluffs Organi...	Check	Created	Commercial Payer		0.00	0.00	0.00	0.00	867	1477
1211	120246PROF...	PROFESSION/	09/02/2020	WI Split Bluffs Organi...	Check	Created	Commercial Payer		0.00	0.00	0.00	0.00	867	1478
1314	120246PROF...	PROFESSION/	09/02/2020	WI Split Bluffs Organi...	Check	Created	Medicare		0.00	0.00	0.00	0.00	867	1479
1424	120246PROF...	PROFESSION/	09/02/2020	WI Split Bluffs Organi...	Check	Created	Medicaid		0.00	0.00	0.00	0.00	867	1480

Cash Summary

Cash Summary

Payer
COMMERCIAL PAYOR

Routing #
120246PROFESSIONAL042

Comment
—

Service Area
WI Split Bluffs Organization

Routing Code
Professional Payments Automatic

Department
INTERNAL MED

Reference Date
09/21/2020

Credit Card #614 | Created

Reference #
614

Deposit Date
09/21/2020

Balances

Posted:	11.00	Cash Amount 11.00
Pending:	0.00	
External:	0.00	
Outstanding:	0.00	

Payment Posting Activity

There are no posted payments associated with this cash record.

History

Time	Summary	User
September 21		





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.

Editing Cash Control Group - 1423

Group Summary

Status: Pending

Department: EPIC MEDICAL DEPT.

Routing Code: Professional Payments Automatic

Routing Number: 20200923PROFESSIONAL1722

Deposit Date: 09/23/2020

Comment: This is a cash control group comment used as an example. Control group created by Epic, User with a control amount of \$350.00

Amounts

Control: \$350.00

Entered: \$350.00

Remaining: \$0.00

Cash List

Errors? Source Ref # Ref Date Payer/Guarantor Provider ID Cash Amount External Pending Comment Cash ID

1	Check	T3993KID8i9	09/23/2020	EPIC HEALTH		75.00	0.00	0.00	This is a cash record...	7953
2	Check	B37838W9EP	09/23/2020	EPIC HEALTH		120.00	0.00	0.00		7954
3	Check	N873839Z9A	09/23/2020	EPIC HEALTH		55.00	0.00	0.00		7955
4	Check	V56302594ER	09/23/2020	EPIC HEALTH		62.00	0.00	0.00		7956
5	Check	A9484ROC8Q	09/23/2020	EPIC HEALTH		38.00	0.00	0.00		7957

Cash Edit

Source: Check

Transfer

Transfer Cash

Select cash control group to transfer to:

1295 [20200818PROFESSIONAL1455]

Comment:

Sample comment - Transferring a cash record from control group 1423 to control group 1295.

Cash Amount: 75.00

Transfer **Don't Transfer**

Group is ready to be confirmed

ACCEPT AND CONFIRM **ACCEPT** **CANCEL**





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.

Refresh	Filter	Create	Edit	View	Void	Regpen	Create Batch	Assign Batch	View Cash	Assign User	Report	Export
Control Groups Cash Search limit reached. 1000 items in list												
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			



General Updates



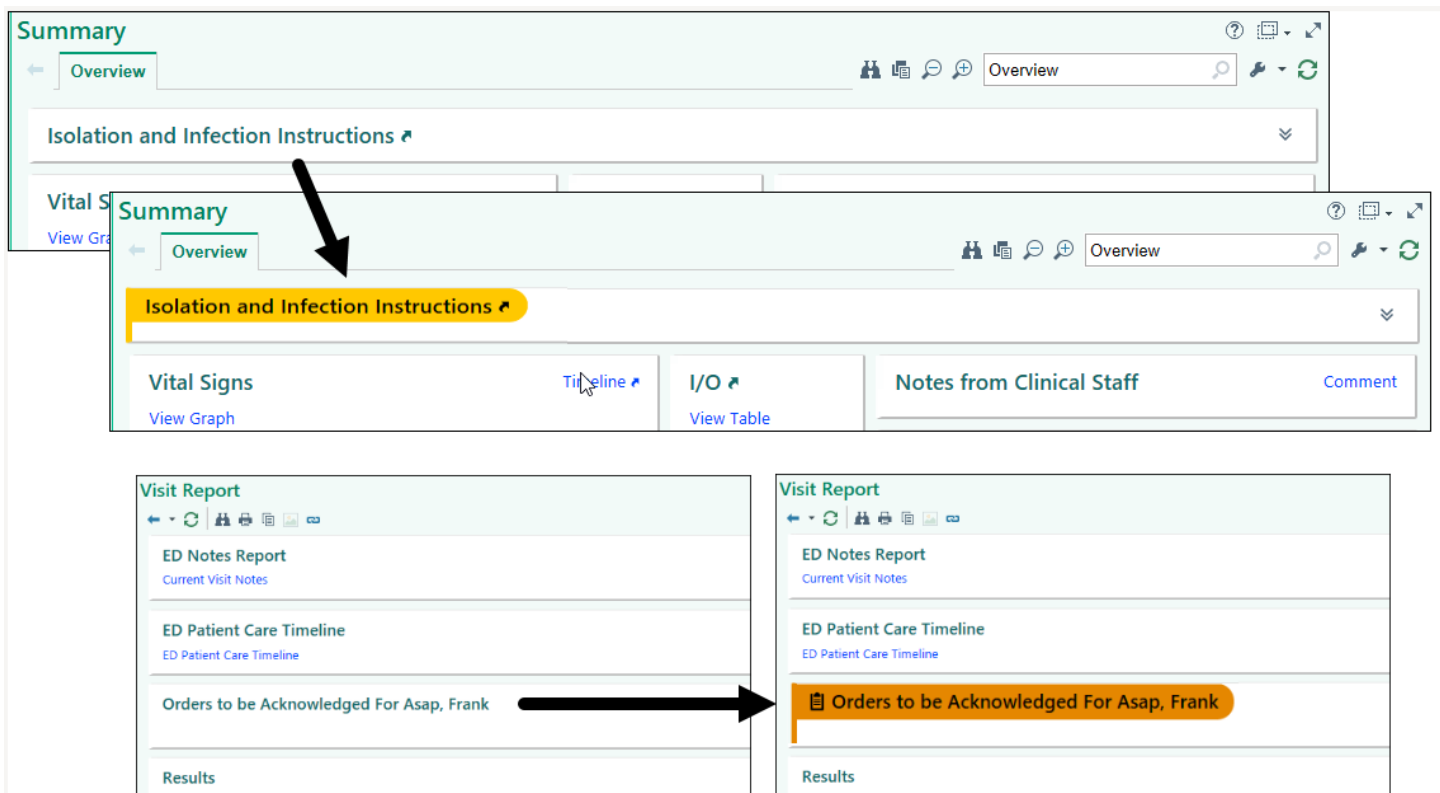
Colored Headers for Important Information More Consistently Appear for Users with Fewer Colors Setting

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.





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.

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

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





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.



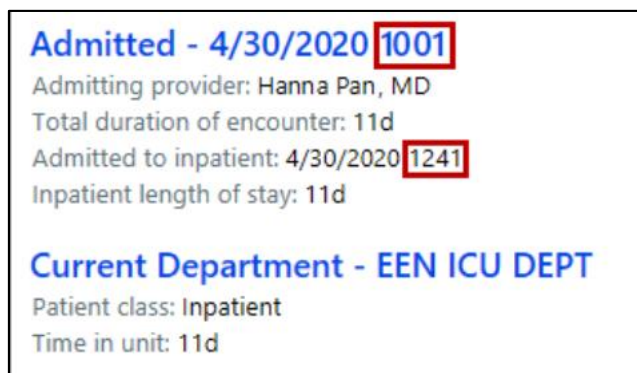
See a Patient's Admission Time in Storyboard

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.

User SmartList – sgnMyProc [12833]

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

Settings

Name

sgnMyProc

Display Name

Name	Description
☆ ERCD	ERCD on @TODAYDATE@
☆ ERCIMGFINDINGS	Breast imaging density and findings
☆ ERCIMGPROC	Displays the procedure associated with the current order or all linked orders.





MyChart's New Home Page

Key Benefits:

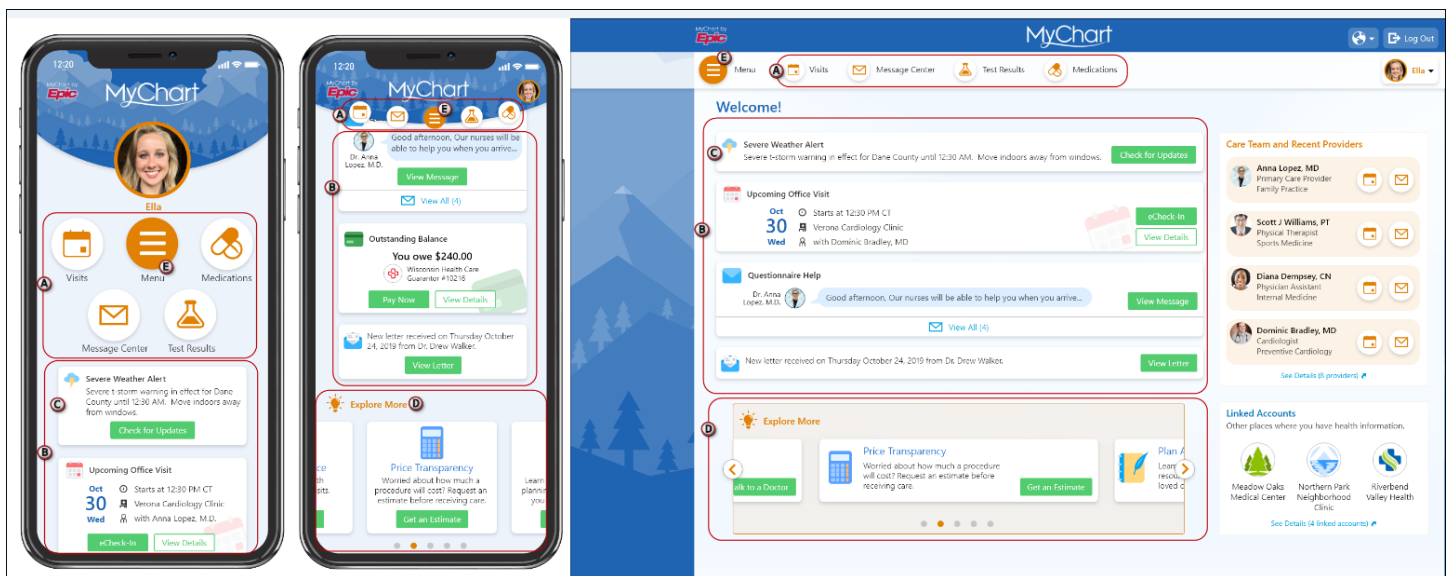
- Improved workflow
- More efficient

 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.

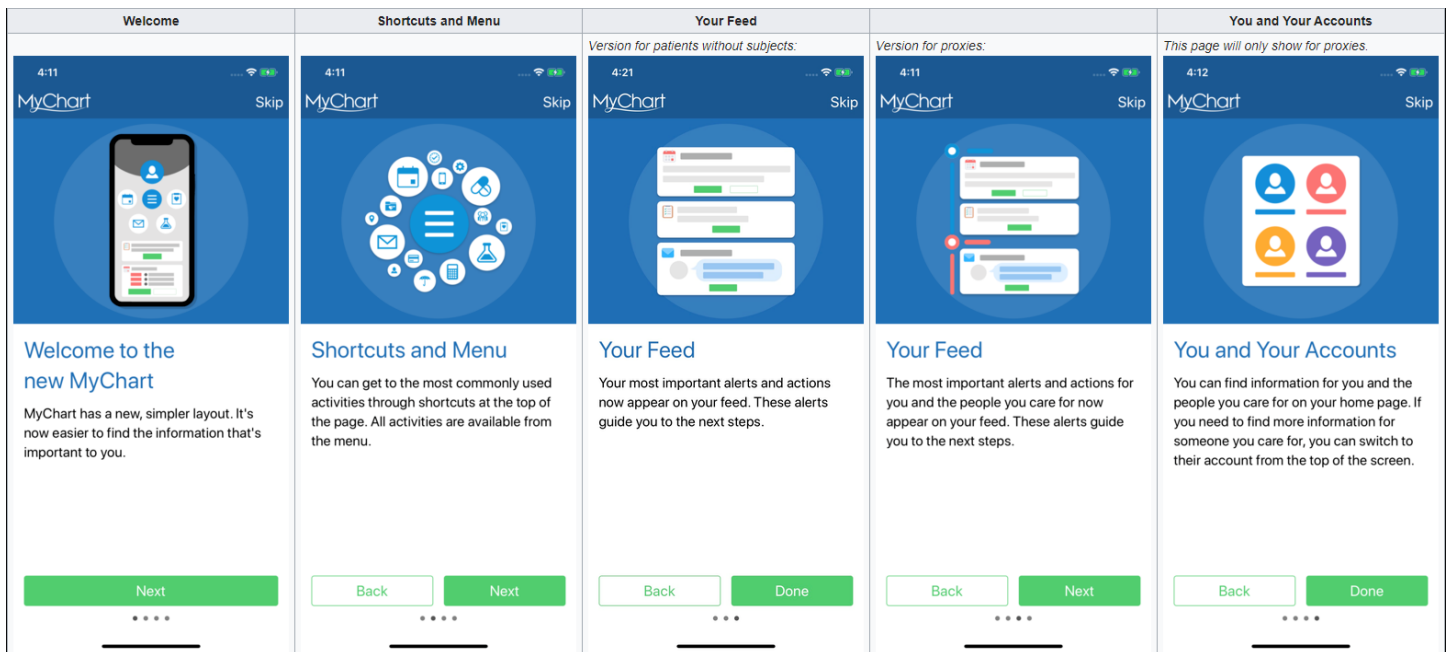
Patients must update the mobile app to version 9.3 or higher to view the changes. An overview of changes will appear when they first log in.



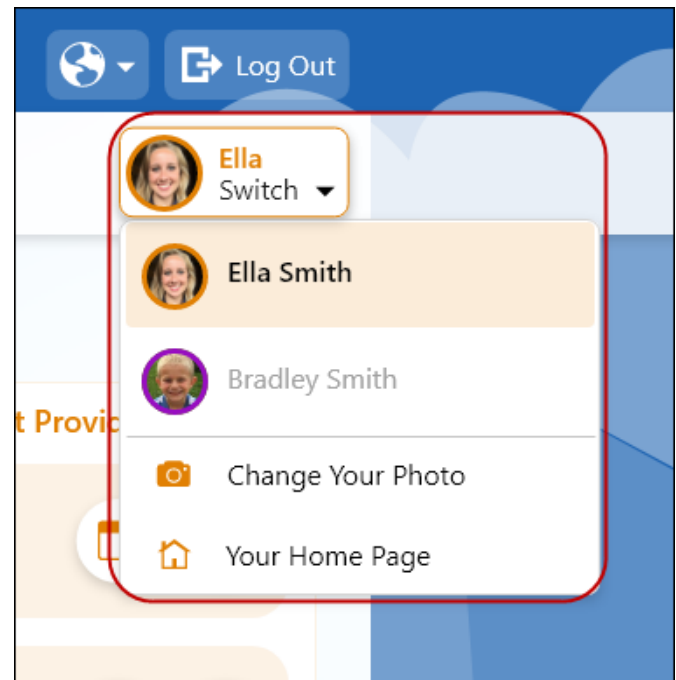
- Shortcuts on the homepage provide easy access to the four activities a patient uses the most.
- The **health feed** is a consolidated view of actionable health updates, including appointment reminders, check-in tasks and messages from the patient's care team.
- Information for proxies and patients 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.
- The **Explore More** section highlights specific functionality and directs patients to features in MyChart.
- The unified menu provides patients with access to every available activity, in addition to what's accessible through shortcuts or the health feed, and patients can search for menu items by name.



Onboarding screens orient patients and proxies to the new **MyChart** experience as well.



Users with and without proxy access can also change their photo or easily jump to their own home page from this same menu on the **MyChart website**. The photo option here, is in addition to the workflow users already have for changing their photo on the **Personalize page**. If a patient does not have proxy access, the menu simply shows the patient's name. On the **MyChart** mobile app, patients can update colors, photos and nicknames from the **Account Settings** activity, which is now available from the mobile switch menu.





MyChart's New Desktop Login Page

Key Benefits:

- More accuracy and reliability

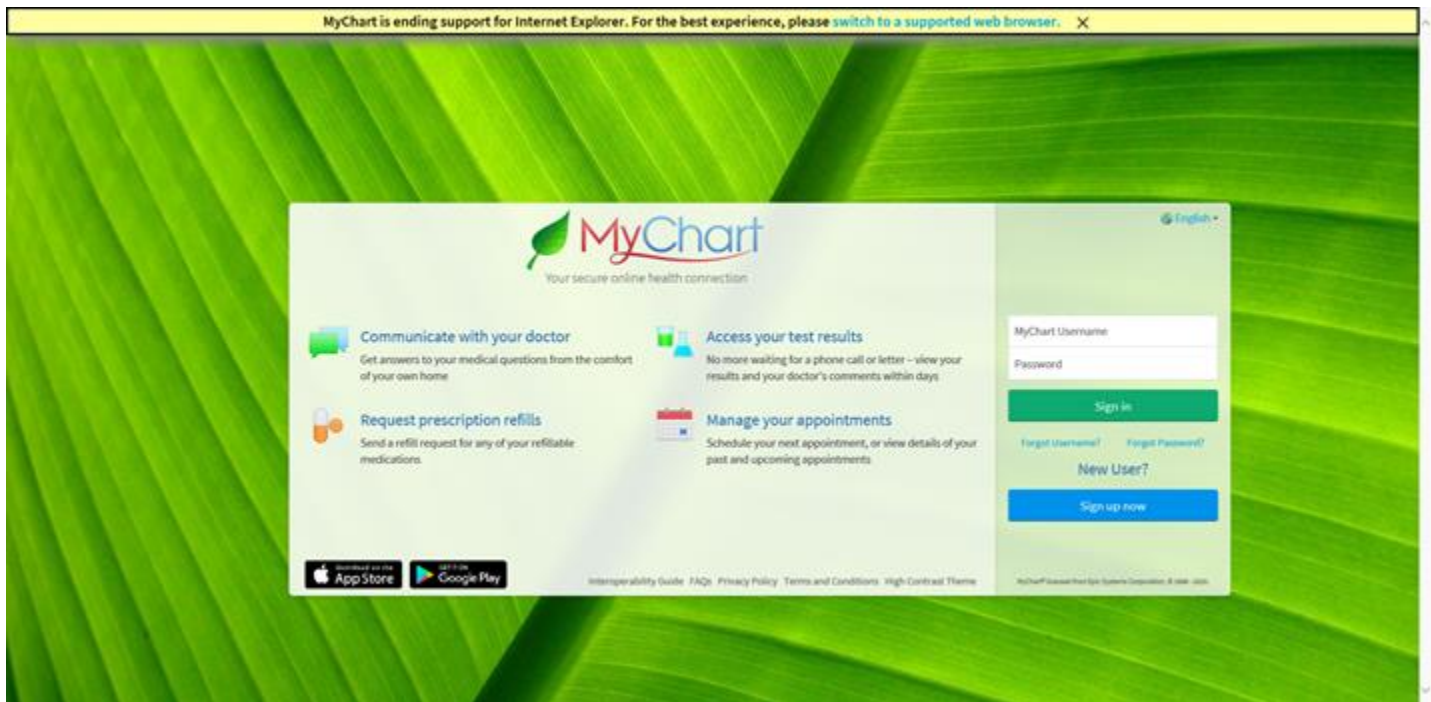
Description:

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**.







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.

Advance Notice Form

Notifier:
Patient Name: Sam,Abes **Identification Number:** 107072

Advance B

NOTE: If Medicare doesn't pay for item Medicare does not pay for everything, have good reason to think you need. W

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

WHAT YOU NEED TO DO NOW:

- Read this notice, so you can make
- Ask us any questions that you may

Notice template: Provider ABNs

Notice status: Notice Triggered [1]

Communication barriers:

Notice adjustments:

Service	Addition
1 URINALYSIS, AUTO, W/SCOPE	

Category Select

Search:

Title	Number
Notice Triggered	1
Notice Printed	2
ABN Signed, Service Accepted (Option 1 - Bill Medicare)	3
ABN Signed, Service Declined	6
ABN Refused--Noted on form, Signed by Two Witnesses	7
ABN Refused--Service Not Performed	8
ABN Signed, Service Accepted (Option 2 - Do not bill Medicare)	9

9 categories loaded.

Accept Cancel

