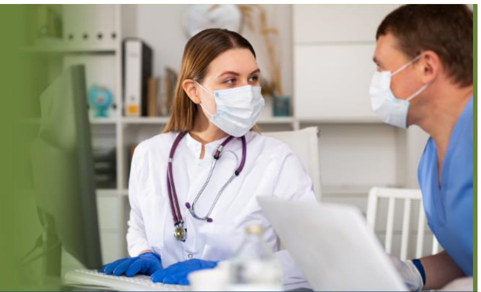
Feb. 21 Epic *Update Companion*



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

Key Change

Paste Like a Pro in Hospital Account Lookup

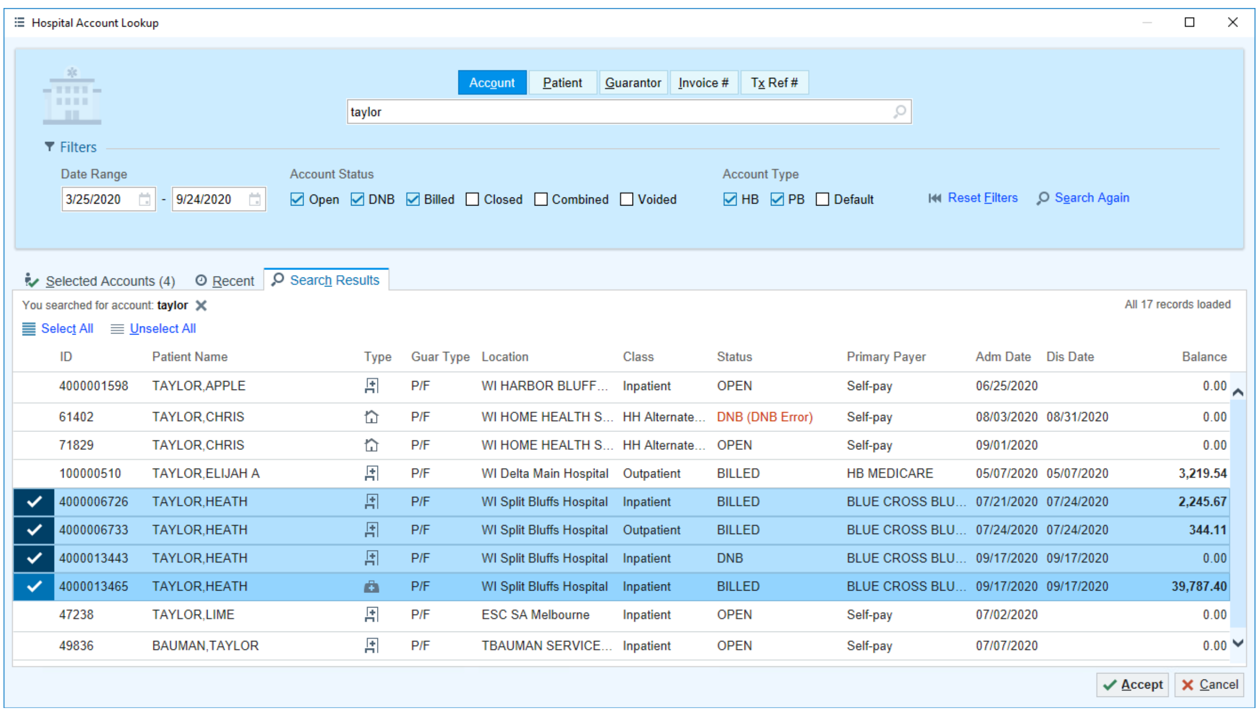
Key Benefits:

- 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.



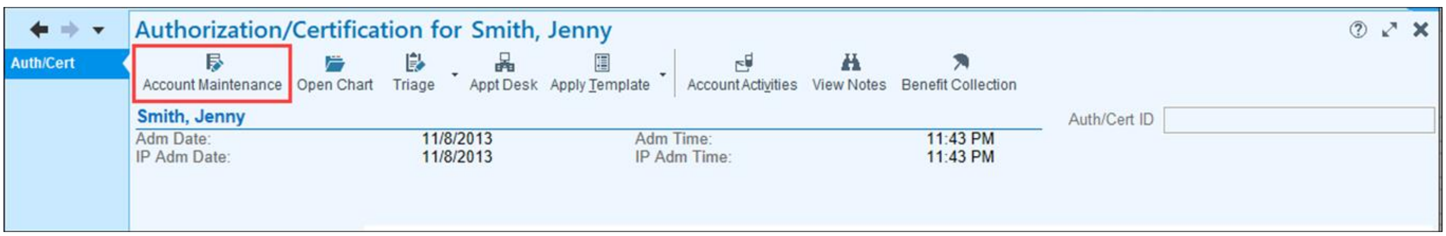
Account Maintenance Button in Auth/Cert Records Opens Encounter's Primary HB HAR

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

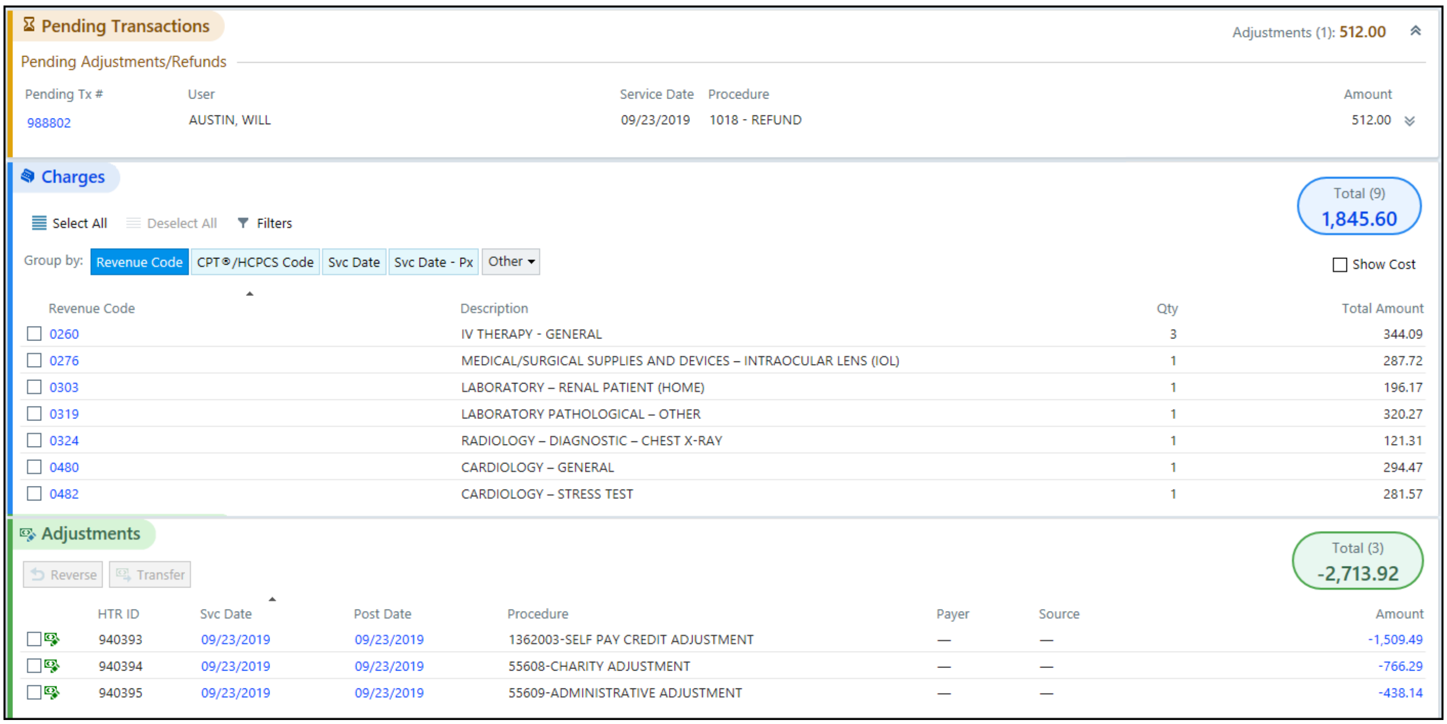
Quickly Review and Act on Transactions

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

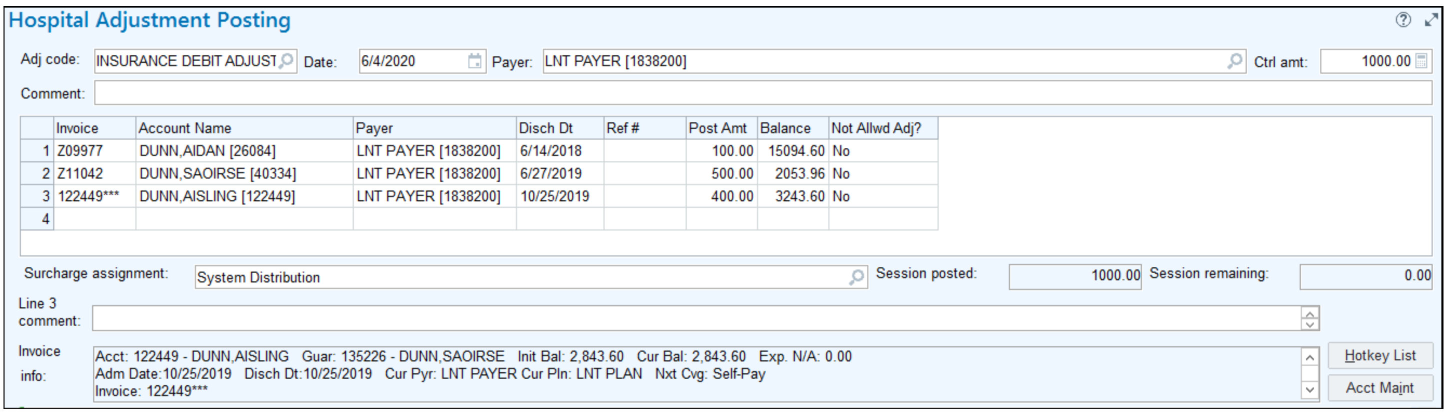
Multi-Line Adjustments Are Now Posted Individually

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.


Hospital Adjustment Posting

Adj code: INSURANCE DEBIT ADJUST Date: 6/4/2020 Payer: LNT PAYER [1838200] Ctrl amt: 1000.00

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: System Distribution Session posted: 1000.00 Session remaining: 0.00

Line 3 comment:

Invoice info: Acct: 122449 - DUNN,AISLING Guar: 135226 - DUNN,SAOIRSE Init Bal: 2,843.60 Cur Bal: 2,843.60 Exp. N/A: 0.00
Adm Date:10/25/2019 Disch Dt:10/25/2019 Cur Pyr: LNT PAYER Cur Pln: LNT PLAN Nxt Cvg: Self-Pay
Invoice: 122449***

Hotkey List

Acct Maint

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.

New Feature

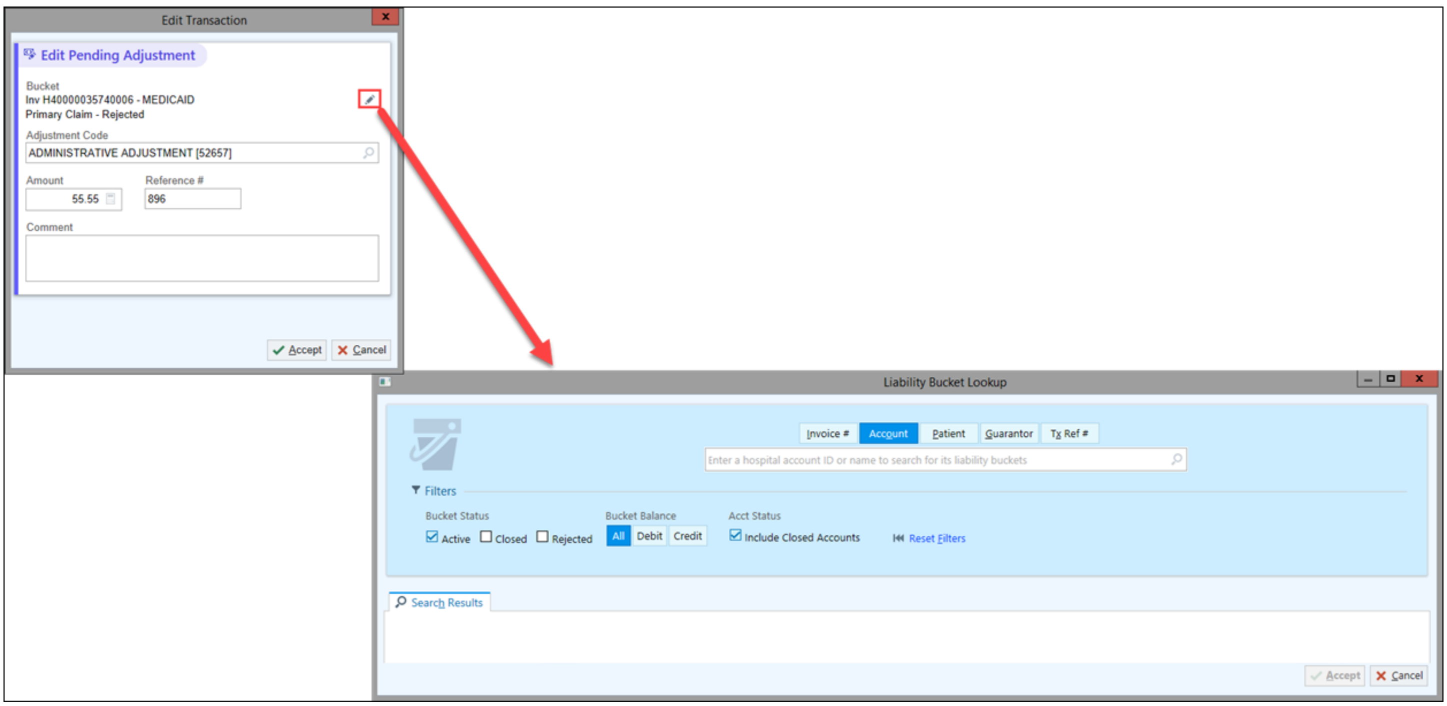
Get More Precise with Your Adjustment Edits in Liability Bucket Lookup

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

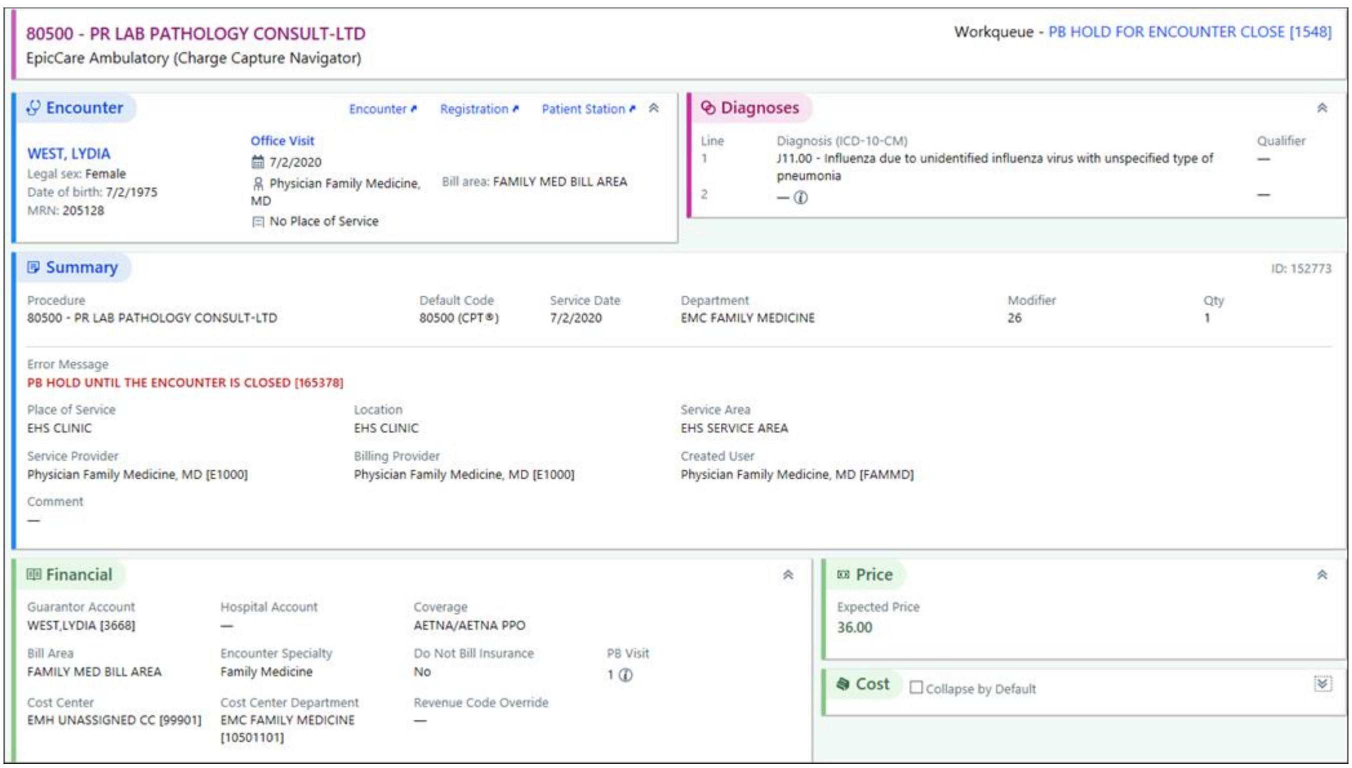
UCL Detail Reports Revamped with More Focused Information

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

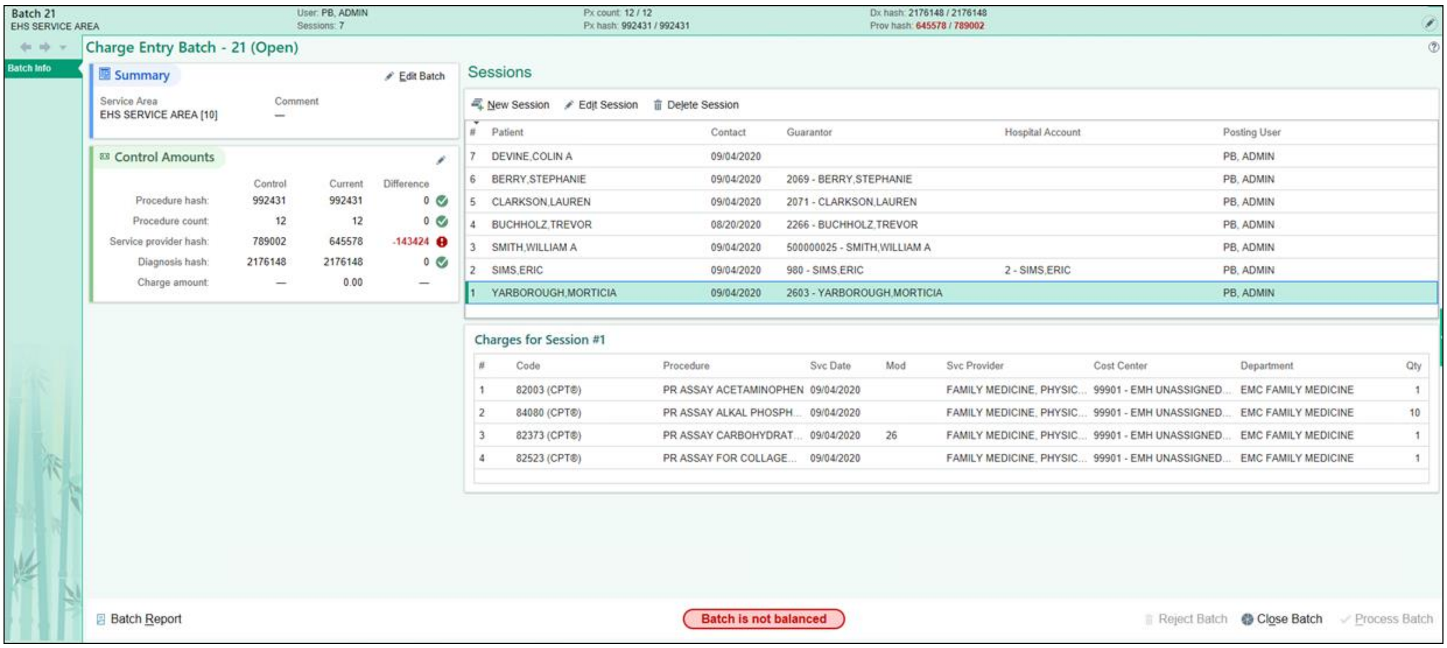
Meet the Improved Charge Entry Batch Activity

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

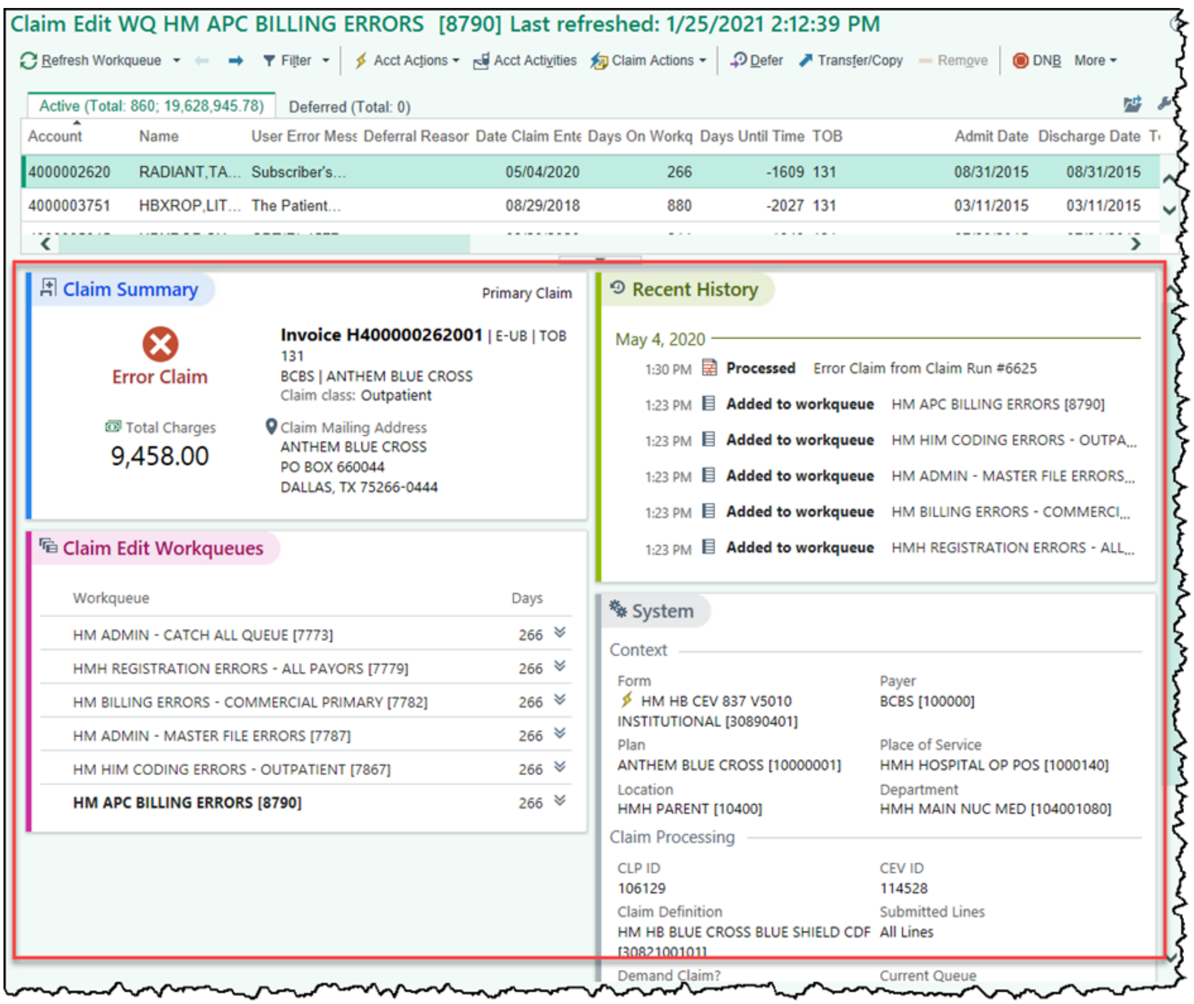
Navigate the Updated Hospital Billing Claim Edit Workqueues

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

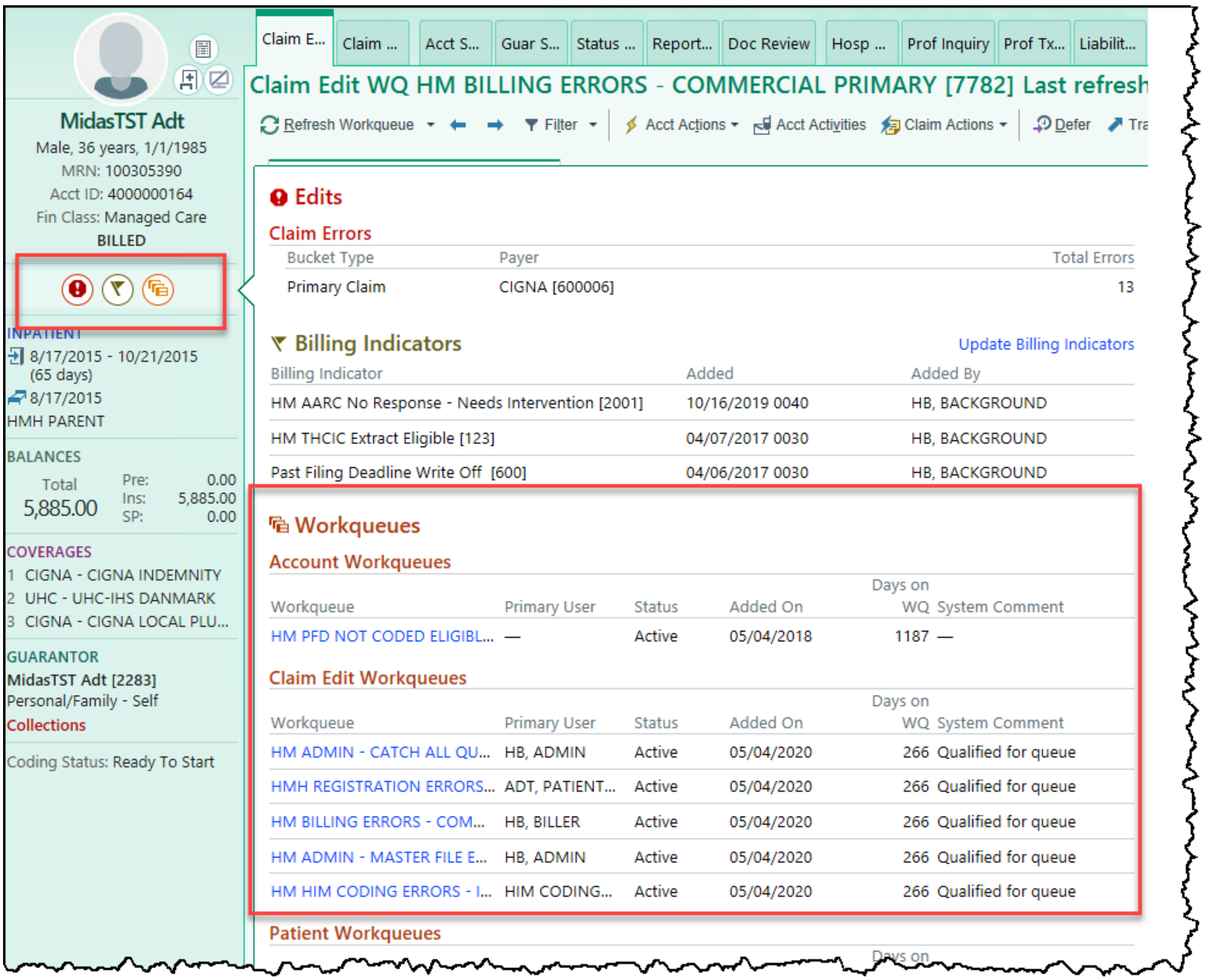
Use Storyboard in Claim Edit Workqueues

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.



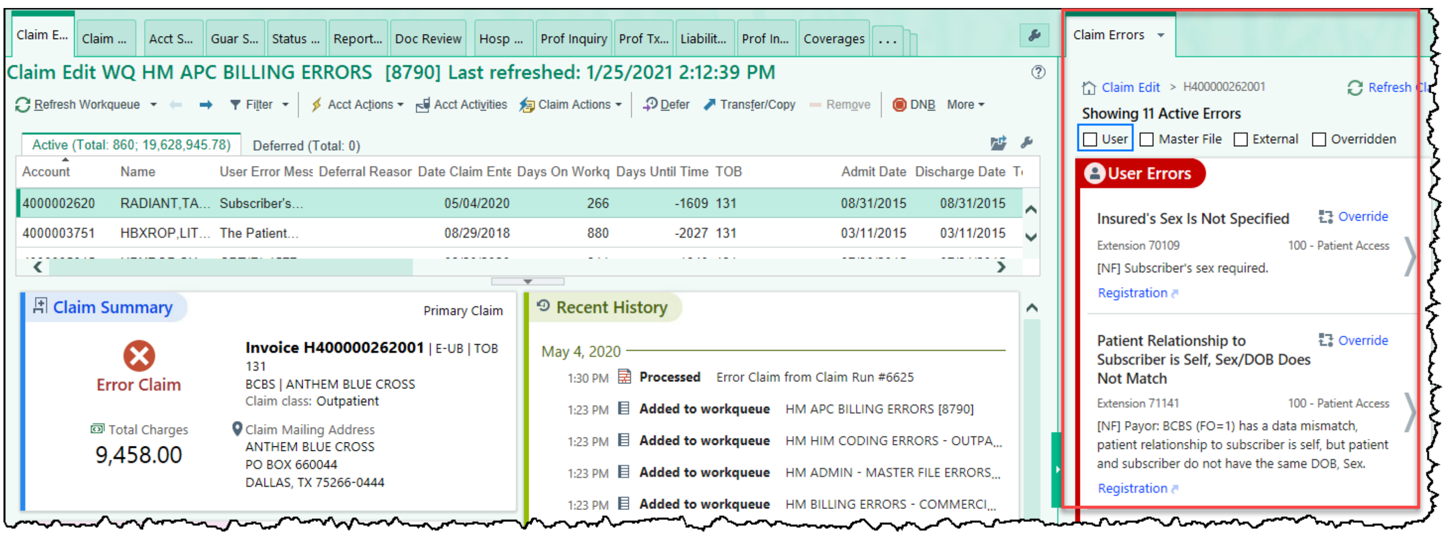
Fix Errors Faster with the Redesigned Claim Edit Assistant

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.

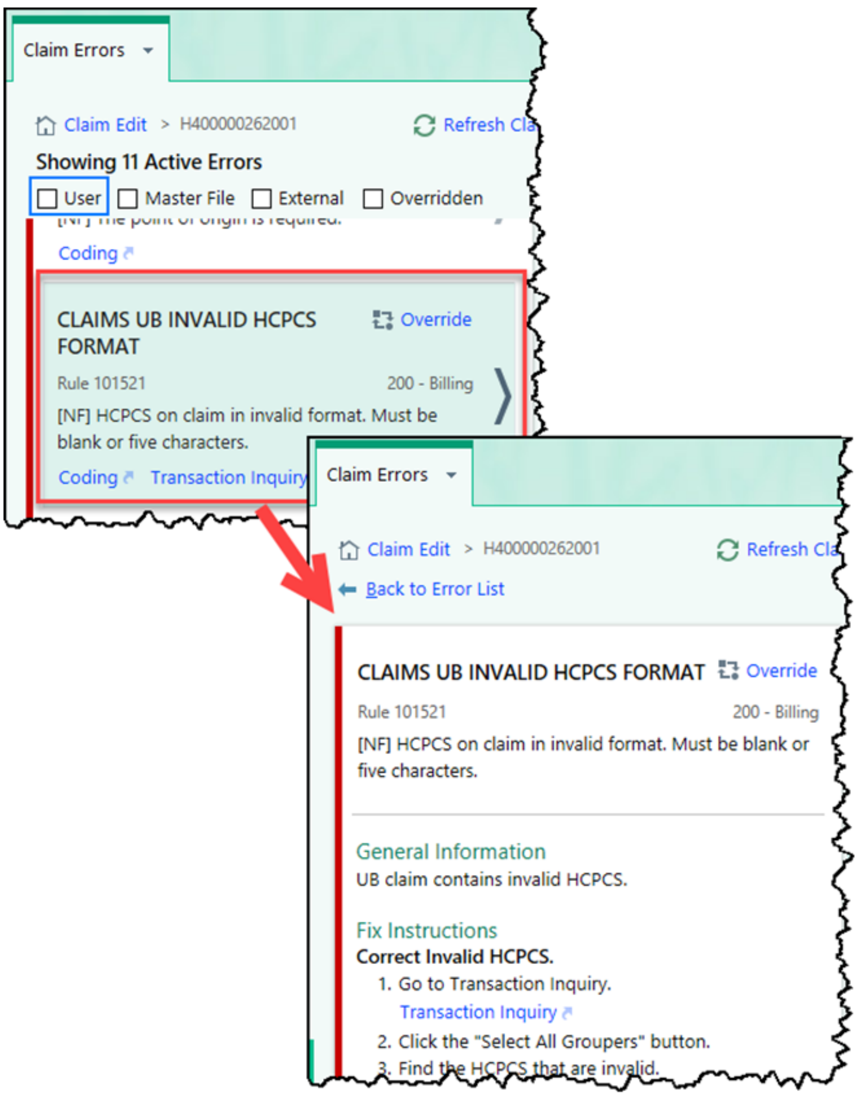


Find Fix Instructions in New Claim Edit Assistant Sidebar

Key Benefits:
More efficient

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**.



epictraining@houstonmethodist.org | it.houstonmethodist.org

New Workflow

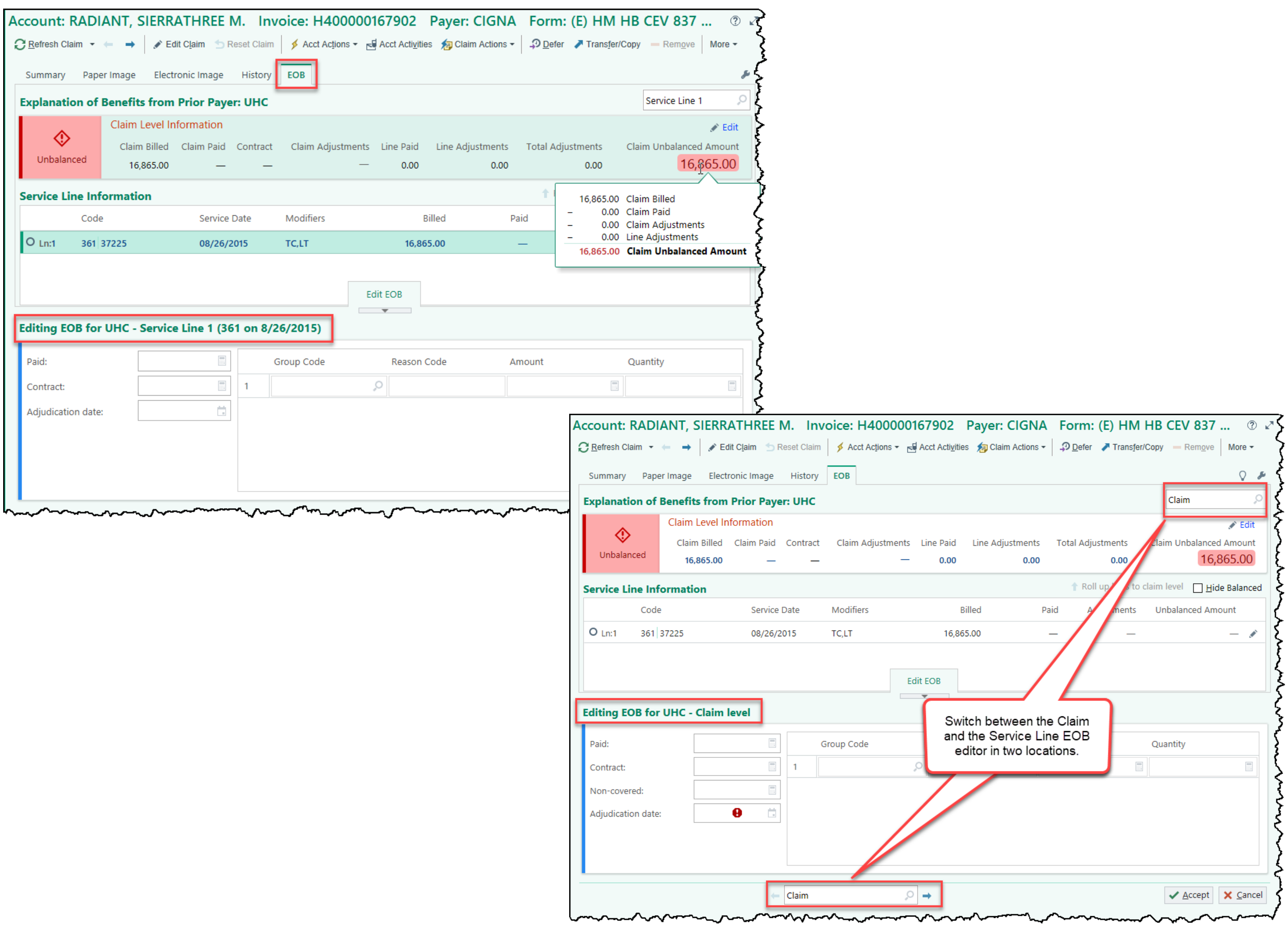
Quickly Balance EOB Lines in the Claim Edit Assistant

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.



New Workflow

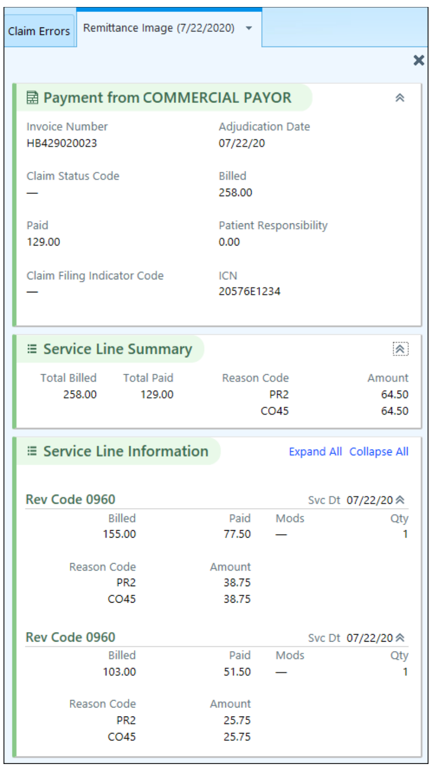
Find Information About Prior Payments in New EOB Sidebar

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.



Cash Management

New Feature

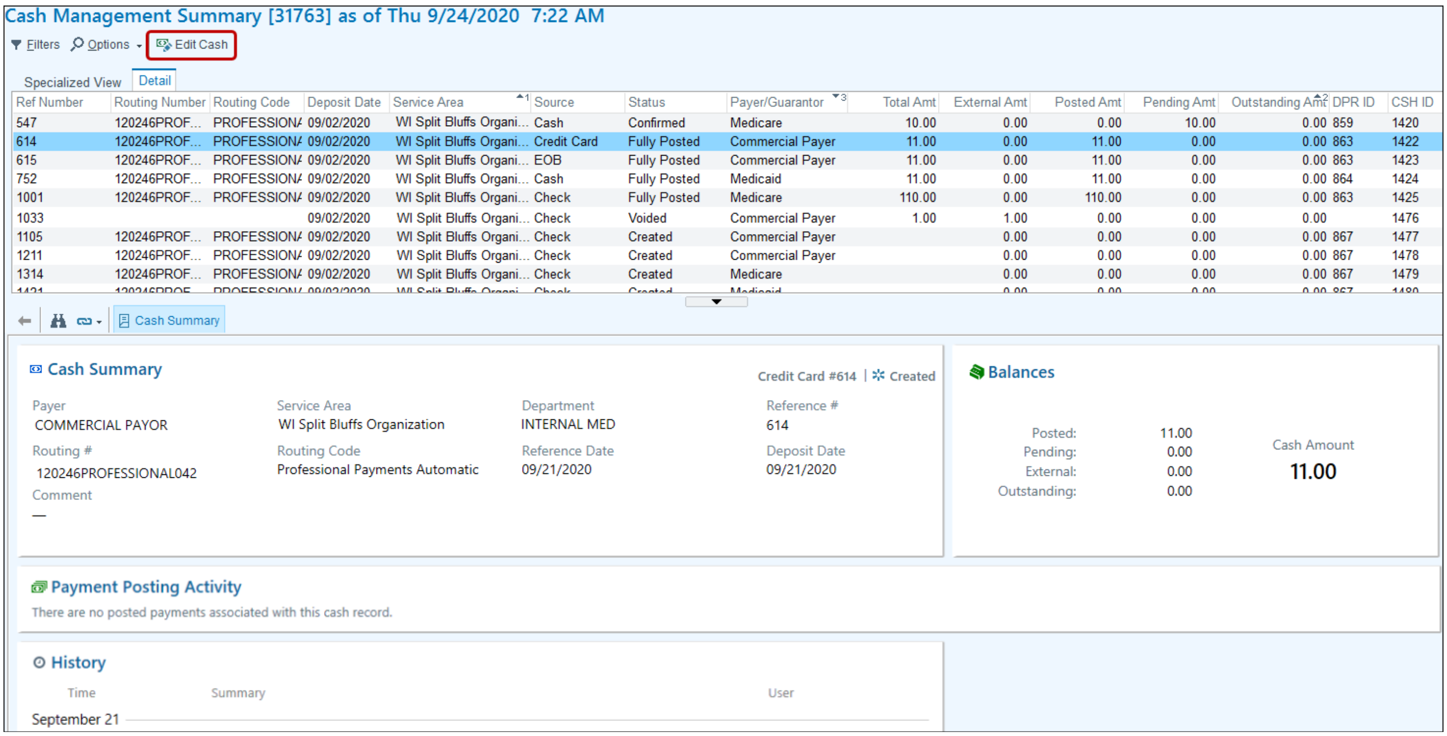
New Reports on Cash Records and Control Groups

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.



Time Saver

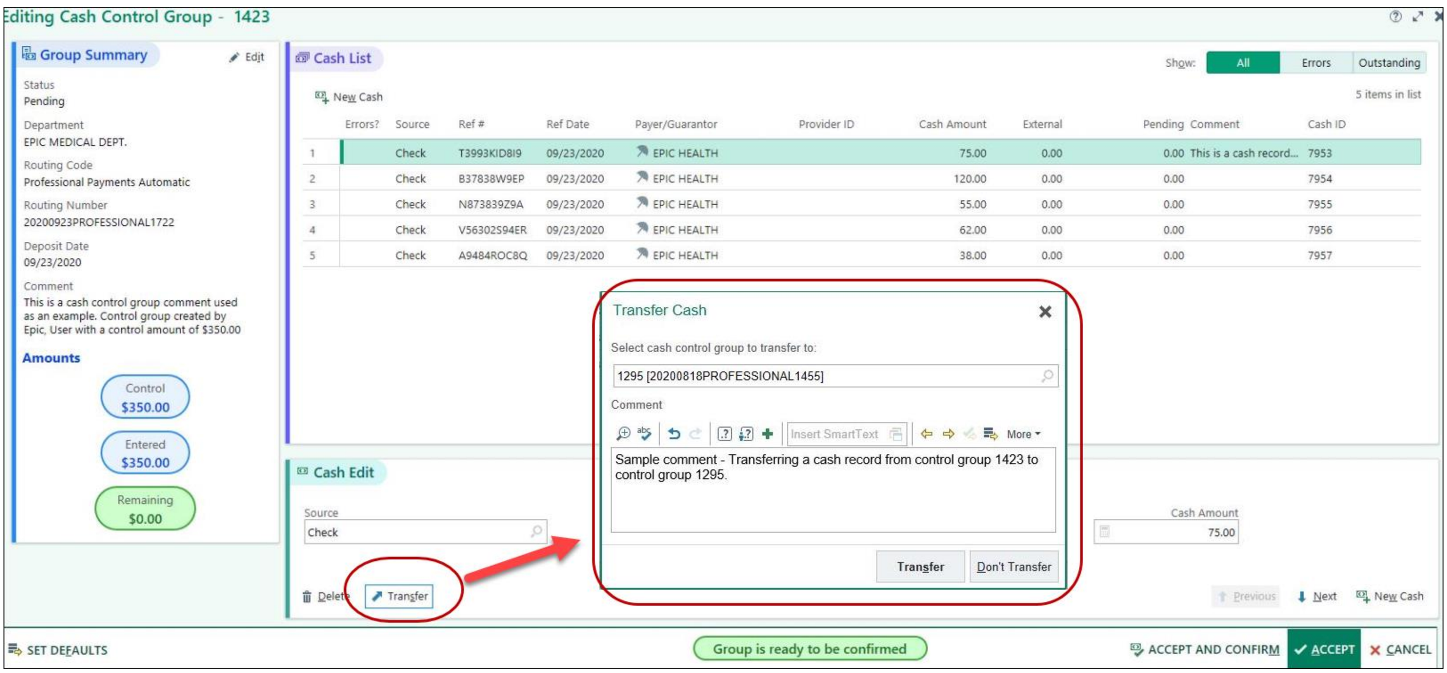
Transfer Cash Records with One Action

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

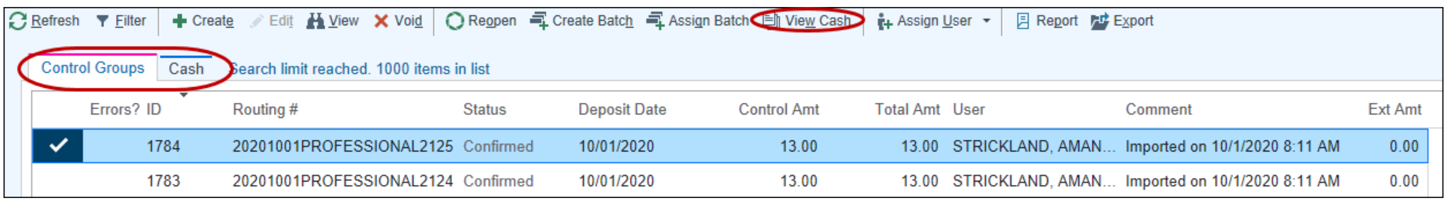
View Cash Lists and Control Groups in Cash Management

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.



Insurance Follow-up

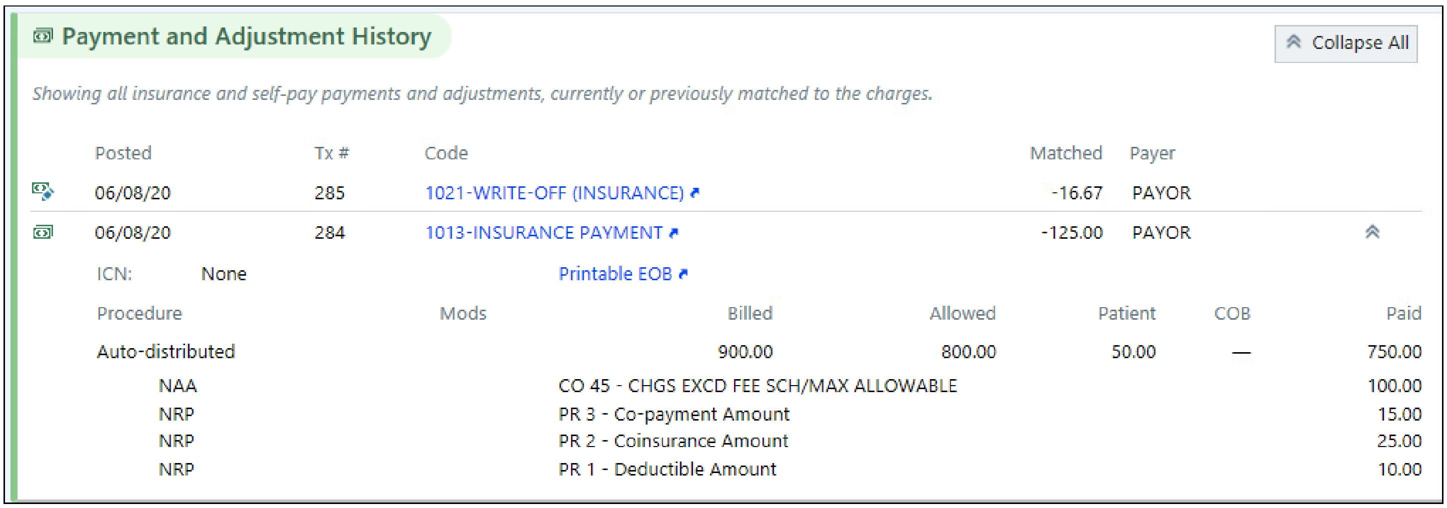
Printable EOBs Show Only Claim-Level for Auto-Distributed Payments

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 not helpful.



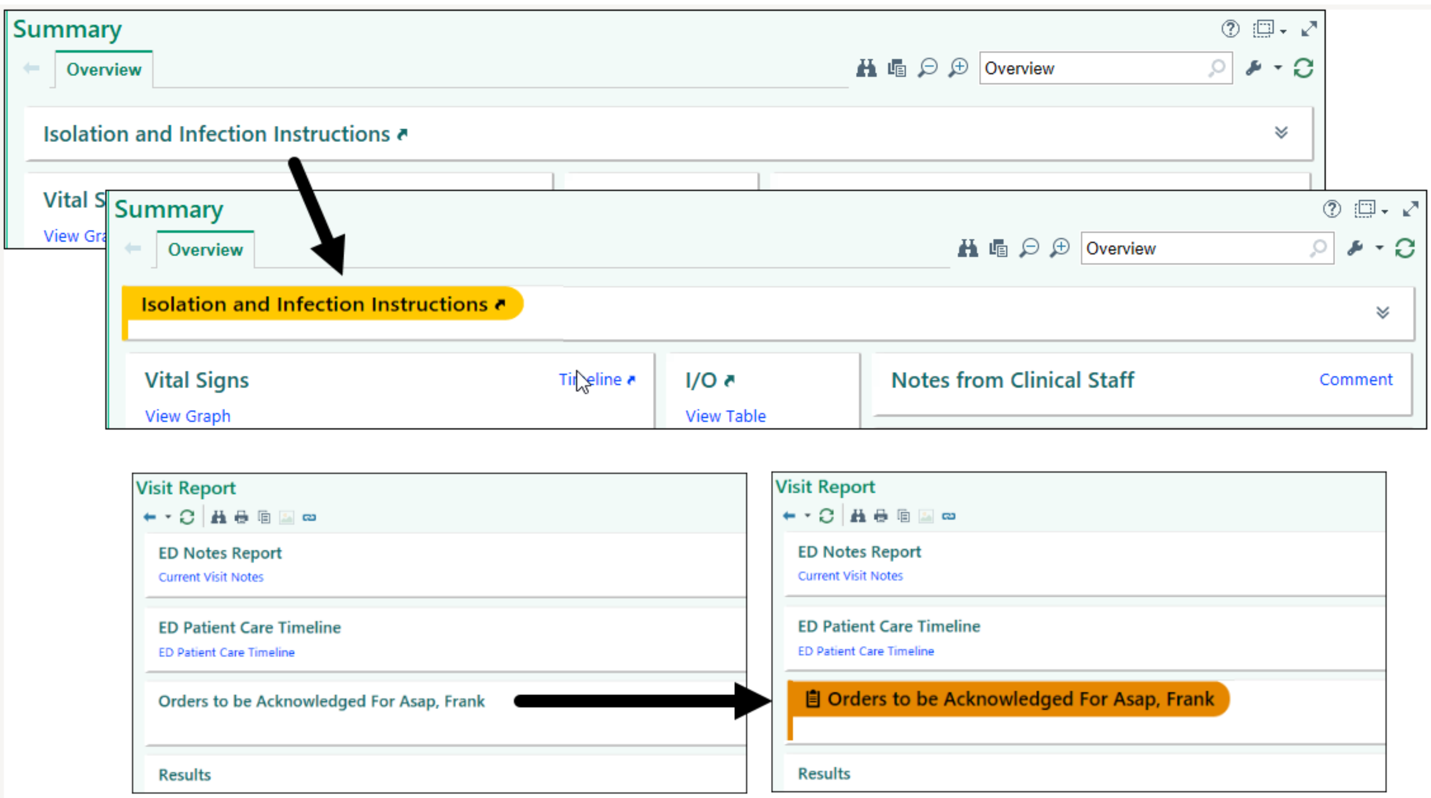
General Updates

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.



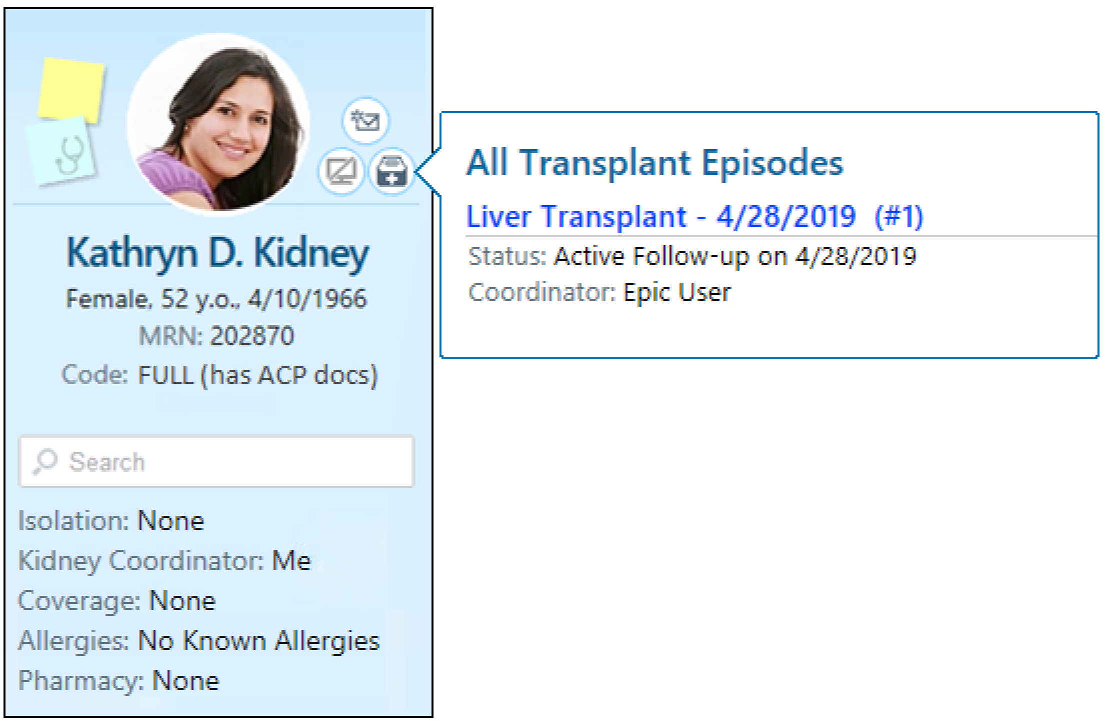
Hover over the Transplant Icon in Storyboard to View the Episode List

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.

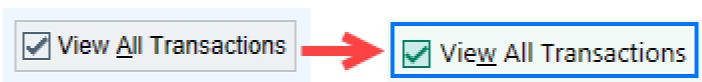


It's Easier to Tell When a Toolbar Button Is Selected

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.

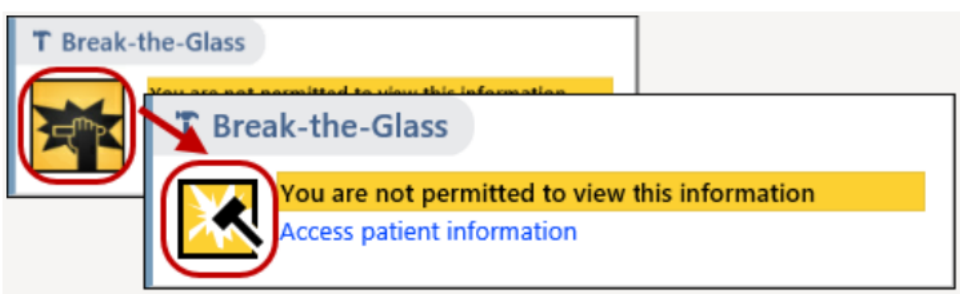


New Break-the-Glass Icon in Reports

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

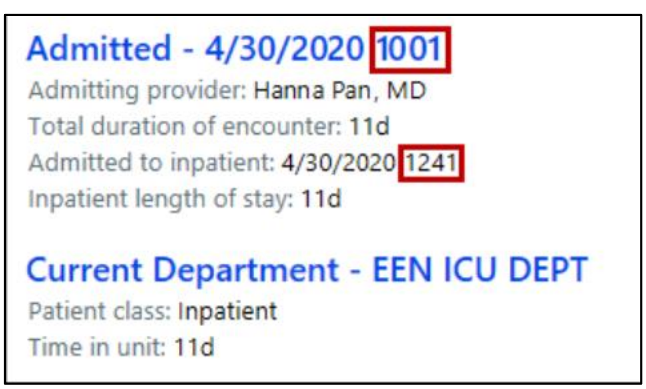
Description:
You can now easily tell when a patient is deceased. The circle containing the patient's photo or initial will be grayed out and surrounded by a black border when you open an InBasket message or the chart for a deceased patient.

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

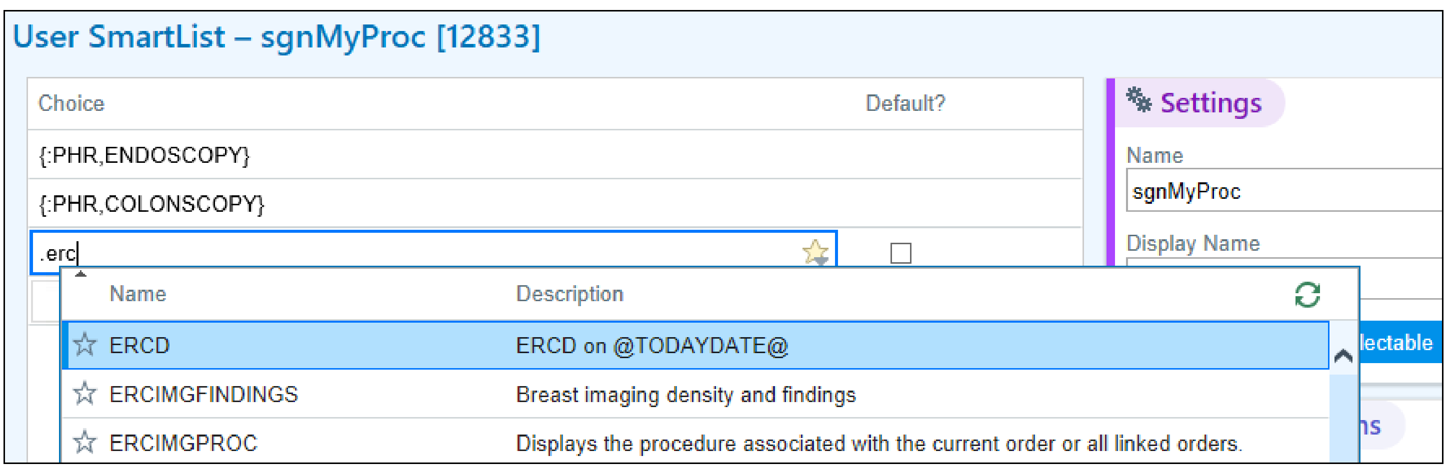
Key Benefits:

- 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.



New Look

MyChart's New Home Page

Key Benefits:

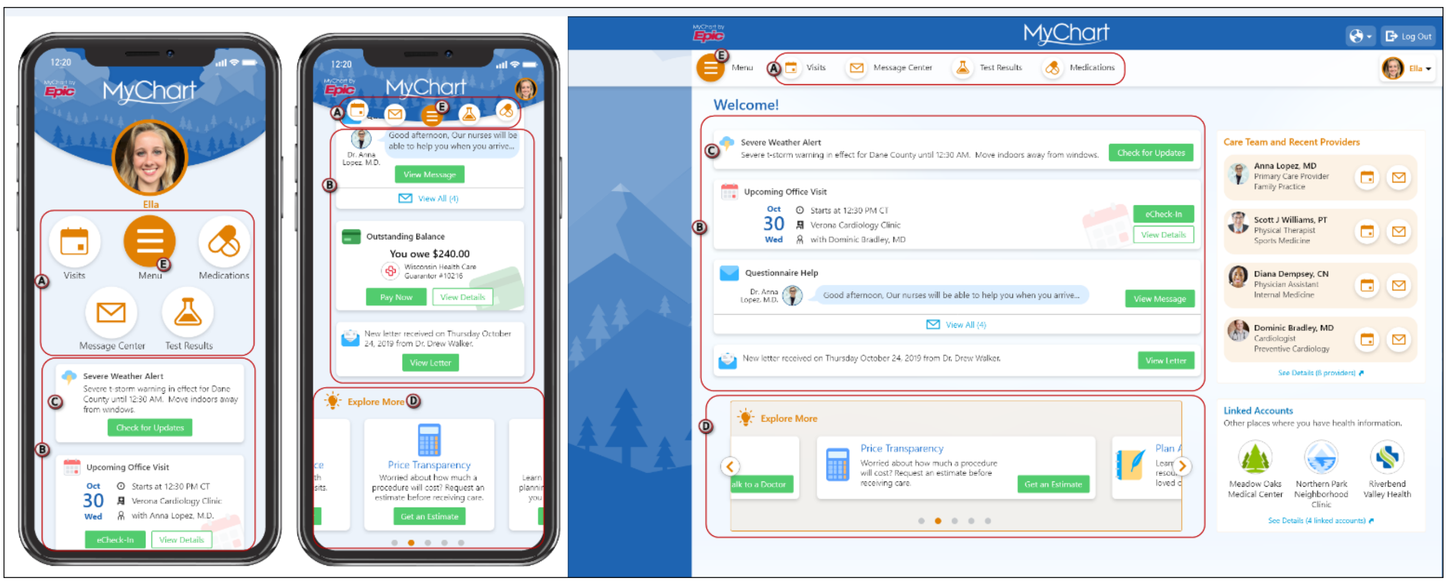
- Improved workflow
- More efficient

View the [New MyChart Experience](#) video.

Description:

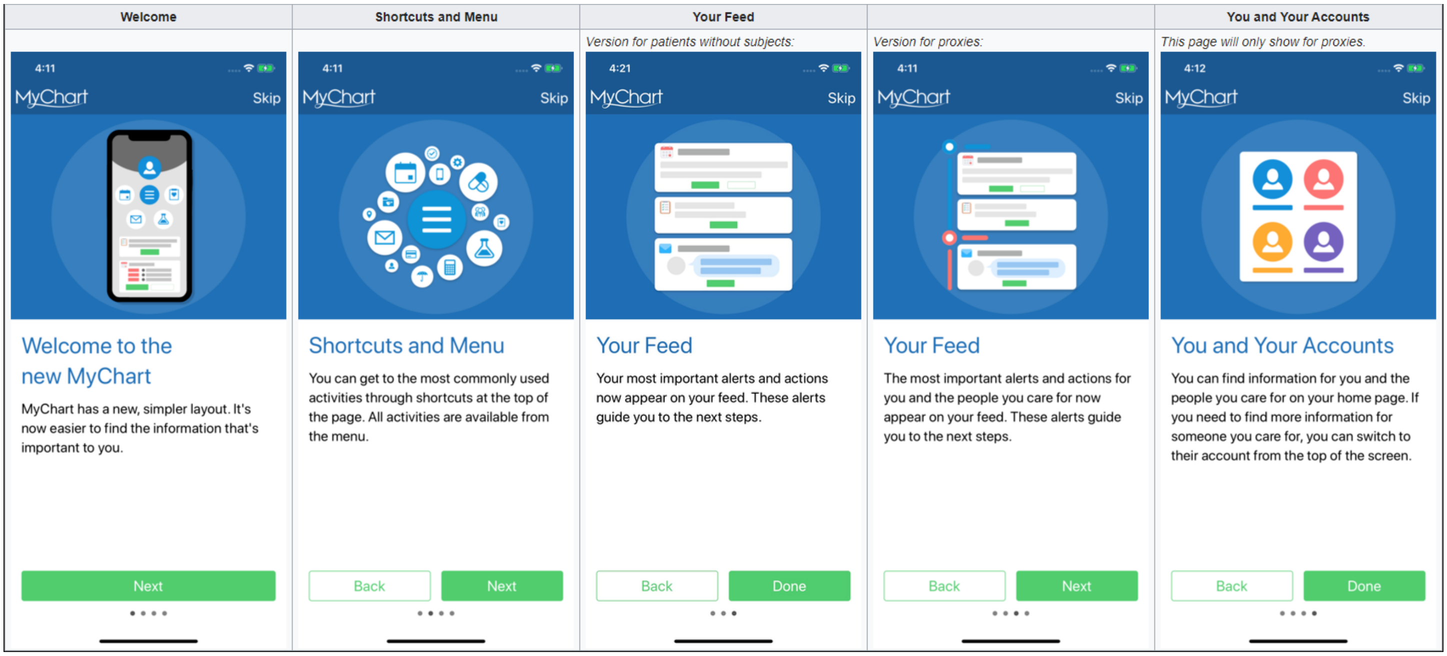
The **MyChart** homepage and user experience is being redesigned to make it cleaner and easier to use. All features and functionality are available on both the web and mobile app platform. The new design provides shortcuts to common activities and an actionable list of updates for the patient.

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.

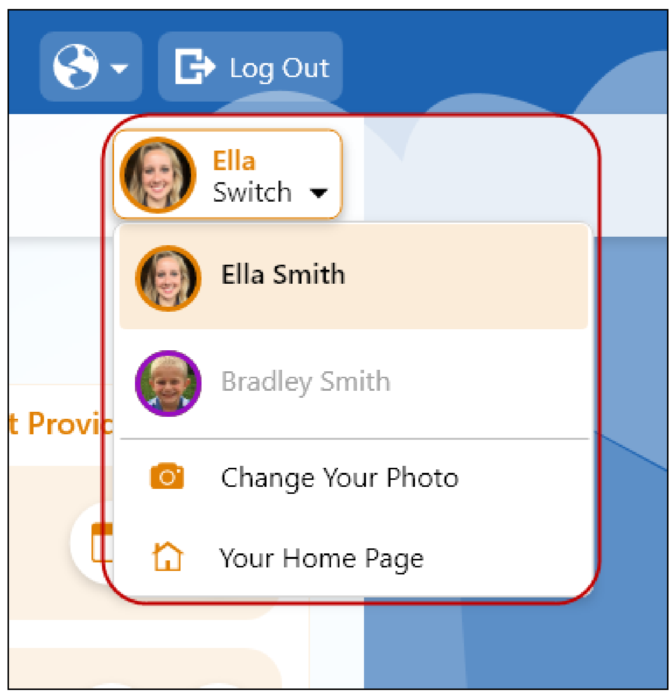


- Shortcuts on the homepage provide easy access to the four activities a patient uses the most.
- The **health feed** is a consolidated view of actionable health updates, including appointment reminders, check-in tasks and messages from the patient's care team.
- Information for proxies and patients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

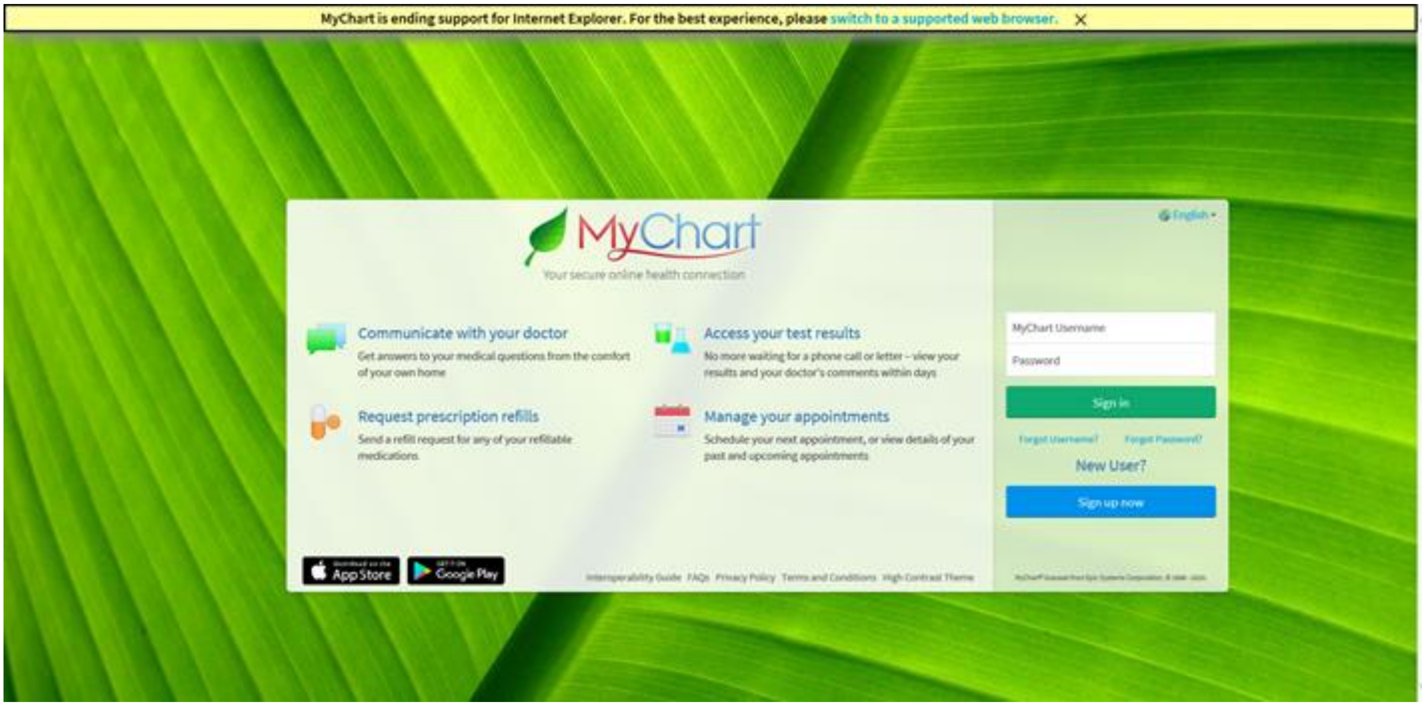
- More accuracy and reliability

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.**


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

Good to Know

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.