Feb. 21 Epic *Update Companion*

Inpatient Ancillary Staff

Updated: 1/25/21

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:

- PCA
- Mental Health Tech
- Unit Secretary
- Cardiac/Pulmonary Rehab
- MAT Staff
- Respiratory Therapy
- Case Manager/Social Worker

- Apheresis Tech
- Infection Control
- Dietician
- Diabetes Educator
- Spiritual Care
- Utilization Review

- Physical Therapy
- Occupational Therapy
- Speech Therapy
- Bioethics
- EEG Tech
- Quality Management

Top Changes for Inpatient Ancillary Staff:

1. [A Fresh Look for the MAR](#)

2. [The Event Log Gets a Boost](#)

3. [Wound Care Specialists Can Monitor Healing and Care with New Wound Clinic Dashboard](#)

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.
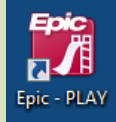
Guided Playground Practice

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.

Log into the Playground as the appropriate user listed below, the password is **train.**

Keep the defaulted login Department. On the **Patient List** activity, use the **Search All Admitted Patients** field to search for and use the patient listed by your role/login below.

Role	Login ID	Patient Name
• PCA	pca00	Grace
• Mental Health Tech	mht00	Norah
• Unit Secretary	us00	Grace
• Respiratory Therapy	resp01	Grace
• Cardiac/Pulmonary Rehab	cardrehab00	Hunter
• MAT Staff	mat00	Joy
• Physical Therapy	pt00	Danielle
• Occupational Therapy	ot00	Danielle
• Speech Therapy	slp00	Danielle
• Apheresis Tech	aptech00	Angelina
• Infection Control	icp00	Noah
• Dietician	iprd00	Angela
• Diabetes Educator	dmedu00	Abby
• Spiritual Care	sc00	Carlos
• Bioethics	bioethics00	Bella
• EEG Tech	eeg00	Andrew
• Quality Management	qual01	Nolan
• Case Manager	cm00	Bobby
• Social Worker	sw00	Bobby
• Utilization Review	ur00	Bobby
• PPS Coordinator	Ppscoord00	Quinn

Key workflows for you to practice include:

- **Set Favorites in Secure Chat on Epic workstations.**
    1. From the **Patient List** workspace, select **Secure Chat** in the toolbar.
    2. Search the name of the person you want to add as a favorite in the recipient name field.
    3. Hover over the name and select the Star icon to save as a favorite.
- **Select the Columns to Print in the Unit Manager.**
    1. From the **Unit Manager** workspace, select the **Print** button in the upper right corner.
    2. The **Columns to Print** section appears when you click the wrench icon.
    3. Use suggested columns that match those used in **Patient Lists** printing or select custom columns.

LDA (Lines, Drains, Airways)

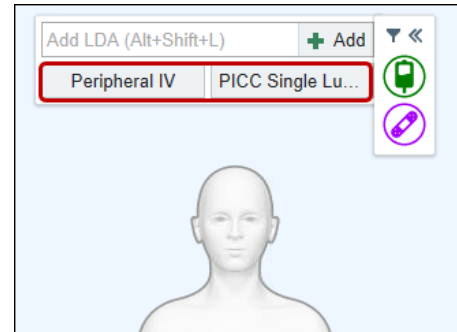## Add Commonly Used LDAs to the Avatar with Quick Buttons

Key Benefits:
- Time Saver

Description:
Quick buttons display the two most commonly added LDAs in your department.

How to:
Click one of the quick buttons to create a new LDA of that type.

## Document LDA Information for Another Staff Member – NN 750024 (Danielle)

Key Benefits:
- Improved Workflow

Description:
Nurses can use the **Responsible** button in the **LDA Avatar** to indicate that they documented LDA information on behalf of another nurse.

How to:
Click the **Responsible** button in the **LDA Avatar** to document the staff member who placed, assessed, or removed the LDA for a patient.
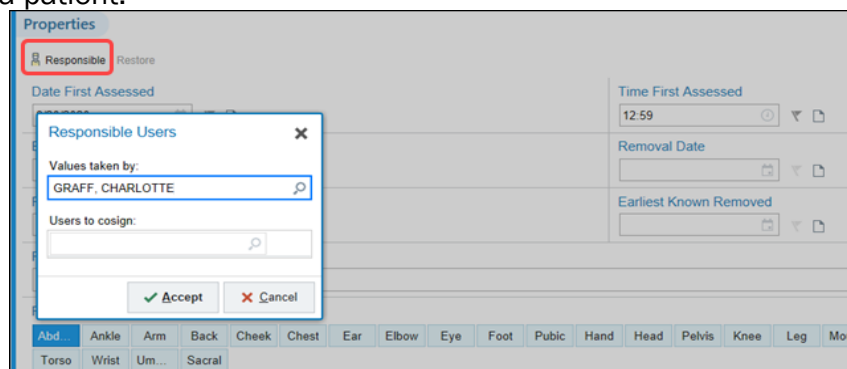
Flowsheets

| New Feature	Filter Devices in the Data Validate Activity

Key Benefits:
- Improved Workflow

Description:
To focus on data from a single device, you can now filter information in the **Data Validate** activity. This helps when multiple devices show unvalidated data at the same time in the **Data Validate** activity.

How to:
Select a device from the dropdown menu in the **File Data From** field to show data from that device only.
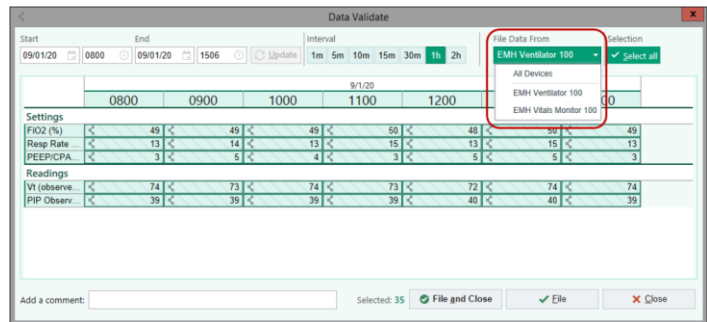
Secure Chat

| New Feature	Set Favorites in Secure Chat on Your Epic Workstation

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 in **Secure Chat** on a workstation.

epictraining@houstonmethodist.org | it.houstonmethodist.org
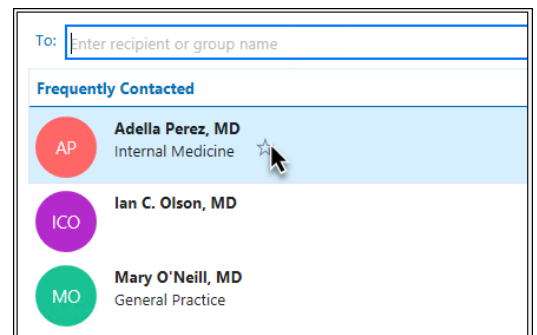
See More Clearly Whether a Colleague Is Available

Key Benefits:
- Easily Visible in Secure Chat

Description:
The availability status in Secure Chat 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.
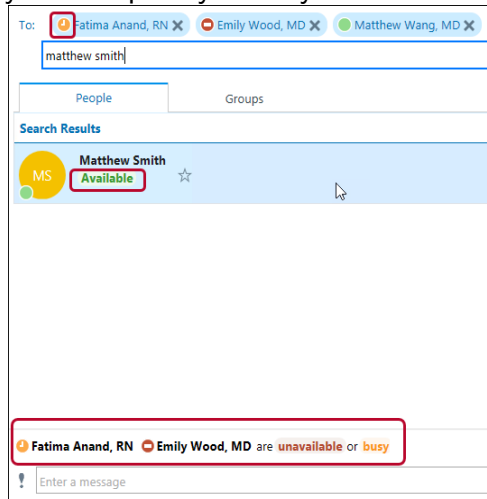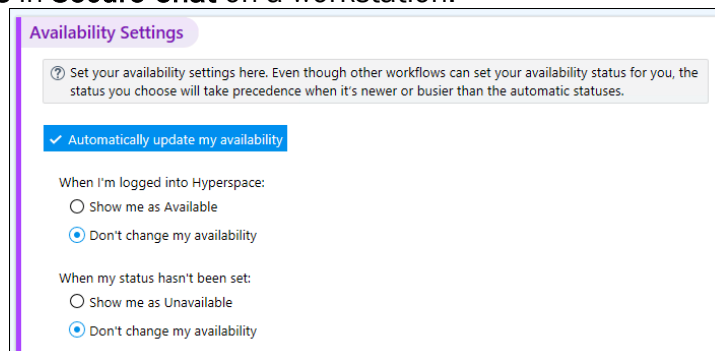

Automatic Secure Chat Availability Updates

Key Benefits:
- Time Saver

Description:
System actions that you take in your everyday workflows, like logging in or out of Epic on your workstation, will automatically change your availability status in **Secure Chat**. To change how your status is updated, use the **Availability Settings** in **Secure Chat** on a workstation.

Care Teams

New Look 🔍   Find and Communicate with Care Team Members More Easily

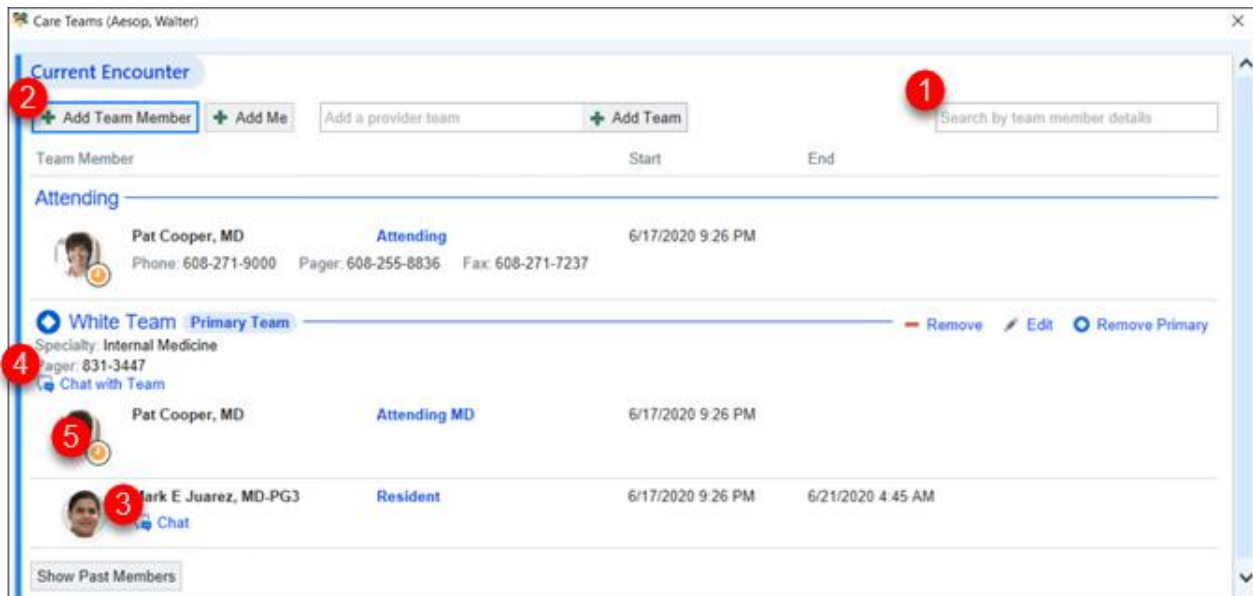**Key Benefits:**
- More Efficient

Description:
The **Care Teams** window (previously **Treatment Teams**) in **Patient Lists** has been reorganized, condensed, and revamped with features that make it easier to view, edit and communicate with patients' care teams.

How to:
To open the **Care Teams** window, right click a patient's name from **Patient Lists**.
1. Use the Search field to search for team members.
2. Use the **Add Team Members** button to add any type of team member.
3. Click **Chat** to send a Secure Chat message to an individual team member.
4. Click **Chat with Team** to send a Secure Chat message to a provider team.
5. Use the **Secure Chat** icon to see a provider's current Secure Chat availability.

Case Manager Updates

### Generate a Patient Choice Handout

Key Benefits:
- More Efficient
- Improved Communication

Description:
Use the **Continuing Care: Patient Choice** section to create a **Patient Choice** handout so patients and their families can document their service provider preferences. The **Patient Choice** handout includes a list of service providers, quality data from CMS when available and a form that patients use to indicate their preferences.

How to:
1. In **Discharge Navigator** click on the **Continuing Care: Patient Choice** section.
2. Select **Continuing Care Need**.
3. **Preview and Print**.
4. View **Previous Option Lists**.
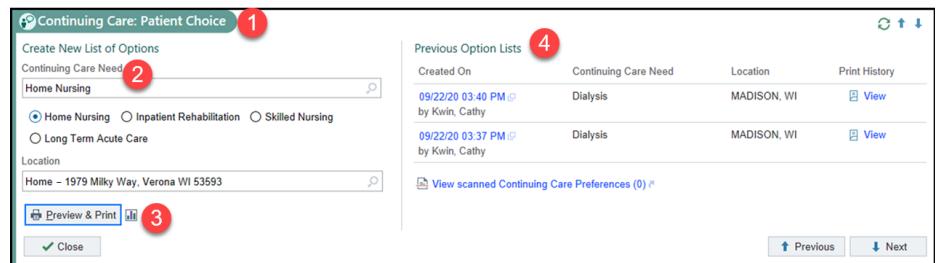
Care Everywhere

Chart Search Results Load More Quickly for External Documents

Key Benefits:
- Time Saver

Description:
To reduce the time it takes to preview very large Care Everywhere documents in **Chart Search** results, a link in the **Chart Search** hover bubble allows you to open the full document, rather than a preview, if the document exceeds the size set in the **Set partial document view** threshold field.

How to:
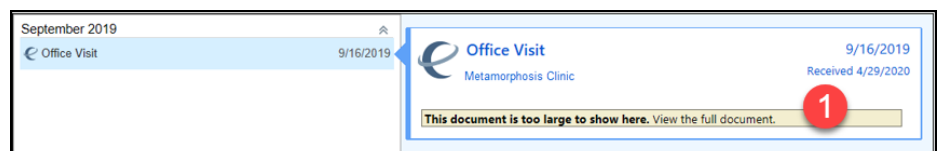1. Click **View the full document** to open it in the document viewer.

Chart Review

New Feature — Bookmark Outside Encounters in Chart Review
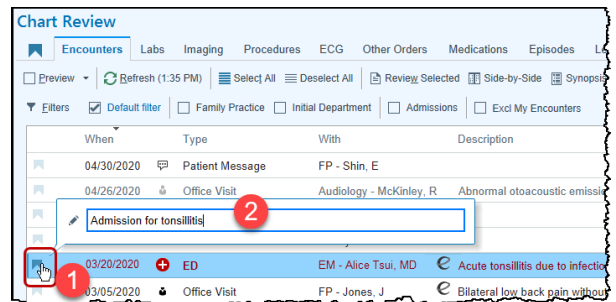
Key Benefits:
- More Efficient
- Improved Communication

Description:
Reviewing encounters from outside sources can give you a broader view of the patient's care and fill in gaps you might otherwise be unaware of. Now, you can bookmark and add comments to outside encounters to easily reference later on the **Bookmarks** tab, alongside any other bookmarked data from the chart.

How to:
1. Click the **Bookmarks** icon.
2. Add a comment about an outside encounter and revisit the information later on the **Bookmarks** tab.

Unit Manager
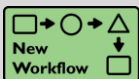
New Workflow — Select the Columns to Print in the Unit Manager
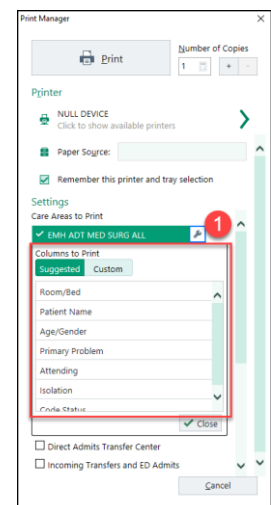
Key Benefits:
- New Workflow

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

How to:
1. The **Columns to Print** section appears when a user clicks the wrench icon next to the selected care area to print.

Resize Care Areas on the Unit Manager

Key Benefits:
- New Workflow.
- Personalizing your Workflow.

Description:
Inpatient nurses, nurse managers, unit clerks, and bed planners can now adjust the size of their care areas to see more beds or optimize spacing directly from the **Unit Manager**.

How to:
1. To resize a care area, you can hover over the space between care areas and drag the highlighted line until the care area is the desired size.
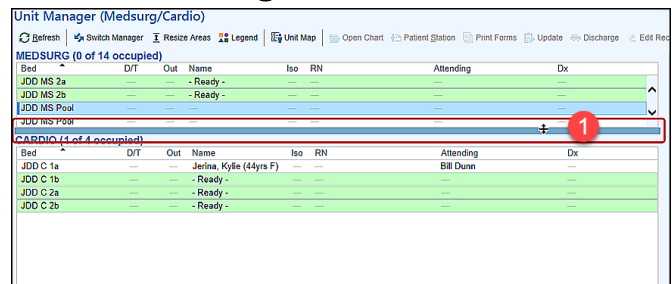

Chart Search

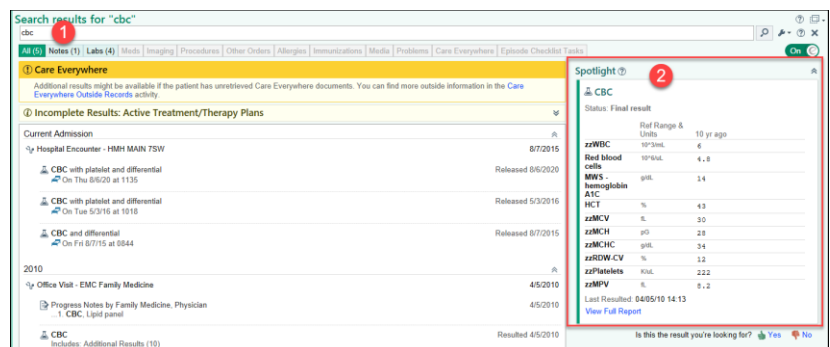## See the Most Recent Lab Results Faster

Key Benefits:
- Time Saver
- More Efficient

Description:
The **Lab Spotlight** sections summarize the most recent lab results and components.

How to:
1. Search for CBC in the search field and press enter.
2. In the **Spotlight Card**, you can see the patient's most recent values right away and can act on that information immediately.

Dashboards

| New Feature	Wound Care Specialists Can Monitor Healing and Care with New Wound Clinic Dashboard

Key Benefits:
- More Efficient

Description:
Wound care clinic managers or providers can see trends in healing rates, days to heal, and risk of pressure injuries for patients with active wounds while keeping an eye on patients with consult orders.

How to:
1. **Wound Care Healing Rates** shows a line graph that displays the percentage of wounds that healed within the 4-week, 8-week, 12-week, 16-week, and 20-week intervals for a revenue location.
2. You can select the type of wound and revenue location that they want to view.
3. **Wound Care Days to Heal** shows the average days to healing for all wounds that healed during the given time range for a revenue location.
4. **Wound Care Pressure Injury Incidence Rates** shows a line graph of the percentage of patients seen at a revenue location who had a hospital-acquired pressure injury.
5. **Patient Lists Glance** shows your **My List** or shared list of choice. For example, you might show a list of patients with wound consult orders.

MAR
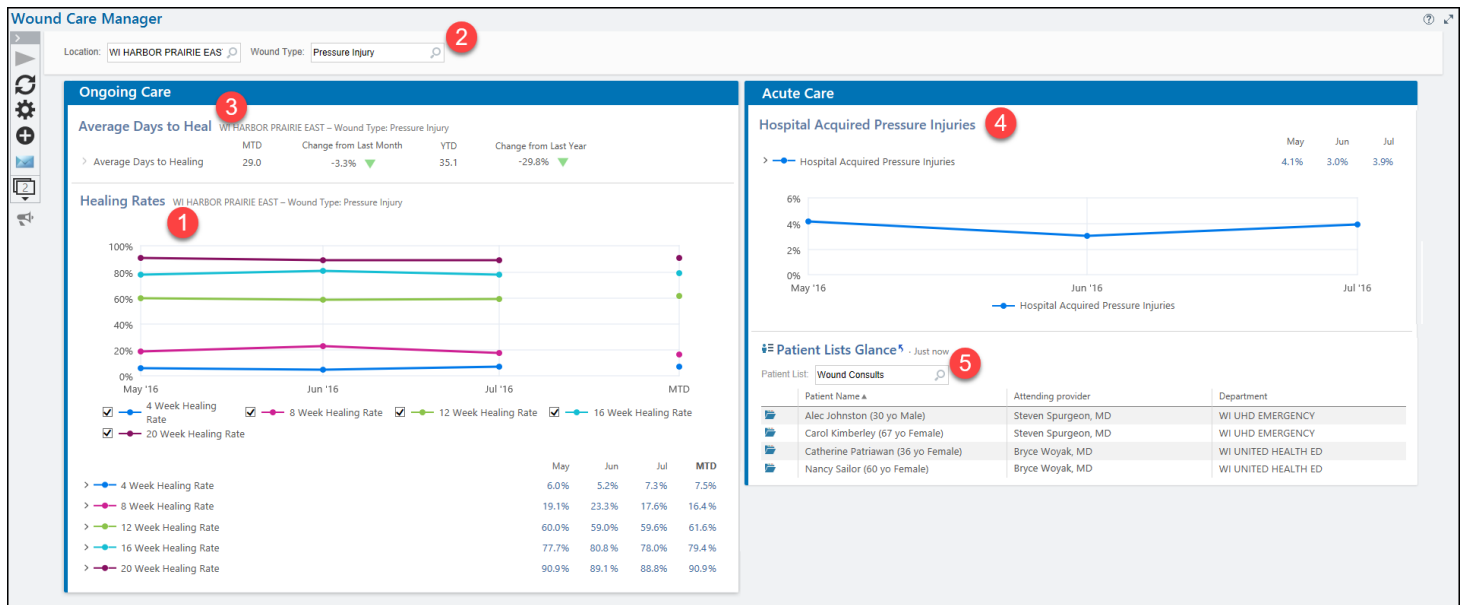
New Feature ✦   A Fresh Look for the MAR

Key Benefits:
- Time Saver
- New Look

Description:
Complete your documentation faster with a fresh look for the MAR Administration form.

How to:
1. Warnings appear below the field that caused them to appear so you can more quickly resolve them.
2. Click **Go to Next** at the bottom of the **Administration** form to go to the next warning or required flowsheet row to complete.
3. Significant flowsheet documentation can be flagged by selecting the flag icon.

Storyboard

PPS Coordinators Storyboard Displays Team Conference and IRF-PAI Columns
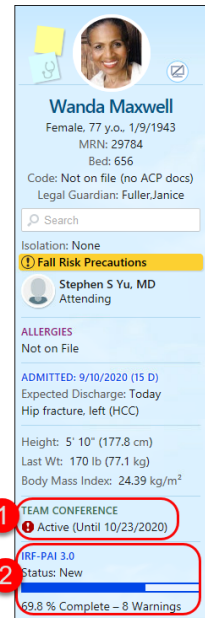
Key Benefits:
- More Efficient

Description:
The PPS Coordinator Storyboard displays the Team Conference and IRF-PAI columns.

How to:
1. See if your patient has an active team conference plan of care or click to open the team conference plan of care.
2. Hover to discover more information about the IRF-PAI assessment or click to open the IRF-PAI.

IRF-PAI

See Warning in the IRF-PAI for Diagnoses CMS Will Not Accept
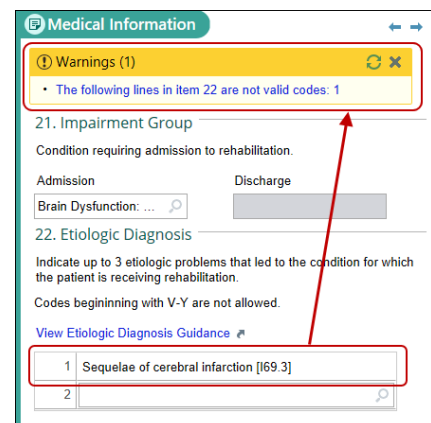
Key Benefits:
- Financial Benefit
- Time Saver

Description:
The IRF-PAI assessment tool now let PPS coordinators know when they have entered an ICD-10 diagnosis code that CMS will not accept as billable.

How to:
1. If staff enter a non-billable ICD-10 code into items: 22-Etiologic Diagnosis, 24-Comorbid Conditions, or 47-Complications, and click **Validate**, a warning will appear.

Event Log

New Feature	The Event Log Gets a Boost

Key Benefits:
- More Efficient
- Time Saver

Description:
The **Event Log** has a new layout containing a main event pane and a sidebar for graphs and reports.

How to:
1. Filters you use to show or hide event types in the **Event Log** now appear in a floating panel on the left side of the screen. A **Pin** button is available to have the panel remain open.
2. Hover on a point in time in the graph to see more information about the data available at that time.
3. The **Event Log** now shows blood gas and vent setting information in the **Event Log's** main pane.
4. When hovering on a medication event, an enhanced hover bubble shows a snapshot of the recent administrations of that medication to the patient.