

Feb. 21 Epic *Update Companion*



Inpatient Surgeon, MD, PA, NP

Updated: 1/29/21

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:

- Inpatient Surgeon
- Inpatient Physician
- Inpatient Physician Assistant
- Inpatient Nurse Practitioner

Top Changes for Role/Department:

1. [Place Future Outpatient Orders from Manage Orders](#)
2. [Click the X to Resolve Problems During Admission or Discharge](#)
3. [See More Information About Patients on the Patient Lists Glance](#)
4. [Find and Communicate with Care Team Members More Easily](#)



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: **IM00, Sur00**

Playground Password: **train**

Key workflows for you to practice include:

- Write future outpatient orders.
- From the **Orders** activity, you can place and sign future outpatient orders, such as post-discharge referrals that you want to initiate while the patient is still admitted, or imaging procedures that will be done at a different facility.
 1. Select desired patient.
 2. Go to **Manage Orders** tab.
 3. Select **Future Outpatient** tab.
 4. Click **New Order**. Search for and select the order you want and click **Sign Orders**.



Mobile Apps



Hey Epic! Talks Back

Key Benefits:

- Time saver.

Description:

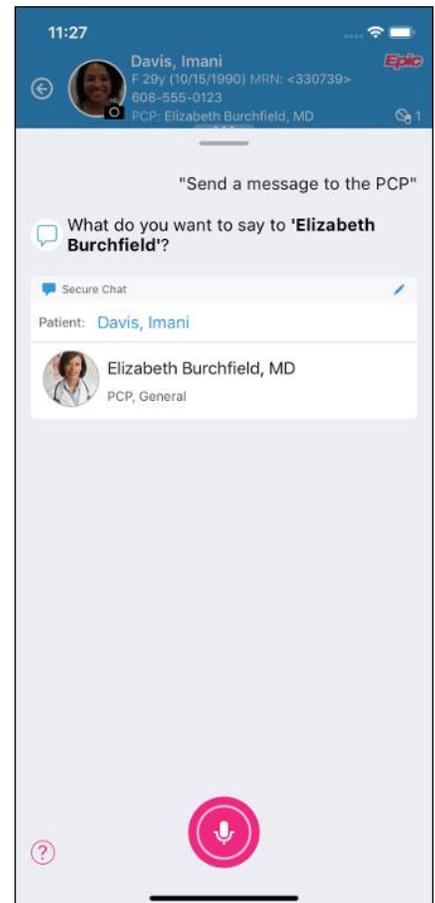
With some commands, **Hey Epic!** now asks follow-up questions for more details and confirmation. You can respond by speaking.

How to:

Open **Hey Epic!** and try out one of these commands:

- “Start a call.”
- “Message Dr. Blue.”
- “Remind me tomorrow.”

Hey Epic! responds with a prompt for details. Spoken follow ups are available in the patient picker and call, reminder and Secure Chat commands.





Secure Chat with Hey Epic!

Key Benefits:

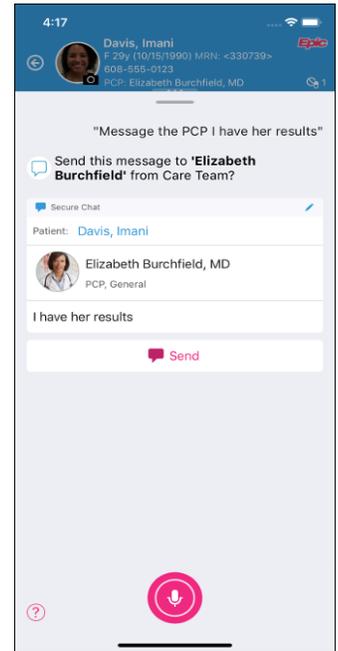
- Improved workflow.

Description:

Use **Hey Epic!** to contact people from your favorites or frequent contacts. In a patient's chart, you can contact a member of the care team by name, role or specialty.

Examples:

- “Message the gastroenterologist ‘I have her results.’”
- “Send a message to Dr. Jones ‘I’m referring my patient to you for a consult.’”
- “Message the attending ‘His BP dropped to 80/50.’”



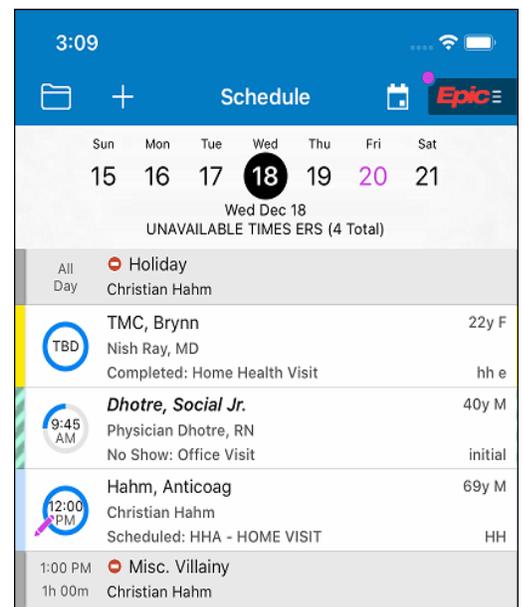
See Unavailable Times in the Schedule

Key Benefits:

- Time saver.

Description:

Holidays, meetings and other unavailable times in your schedule now appear as **gray rows**, so you can review these times and avoid scheduling visits at the same time.





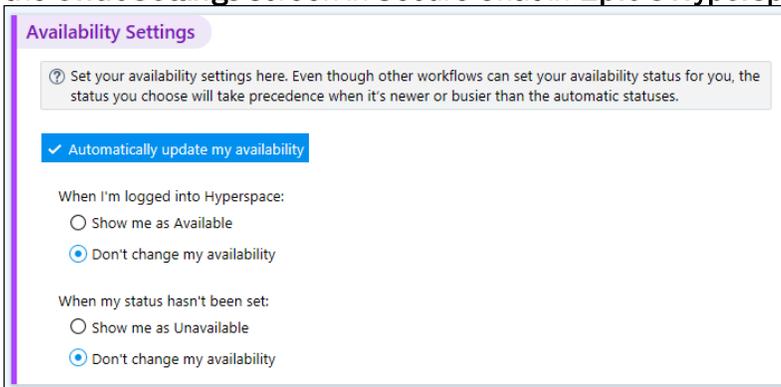
Automatic Secure Chat Availability Updates

Key Benefits:

- Improved workflow.

Description:

You no longer have to set your availability status in Secure Chat for everyday workflows, like logging in or out of **Epic's Hyperspace** – they are now set for you. You can change your personal availability settings on the **Chat Settings** screen in Secure Chat in **Epic's Hyperspace**.



Similar Orders are Flagged in Haiku and Canto on iOS

Key Benefits:

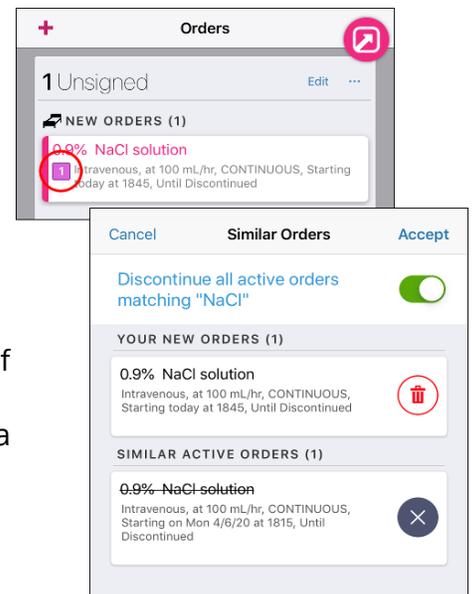
- Improved workflow.

Description:

In **Haiku** and **Canto** on iOS devices, when you queue up an order that's similar to active orders the patient already has, a number appears next to the order.

How to:

- Tap the number to see the similar orders and discontinue them, if appropriate.
- This feature works the same as in the **Manage Orders** activity at a workstation.





Review Outside Problems During Rounding

Key Benefits:

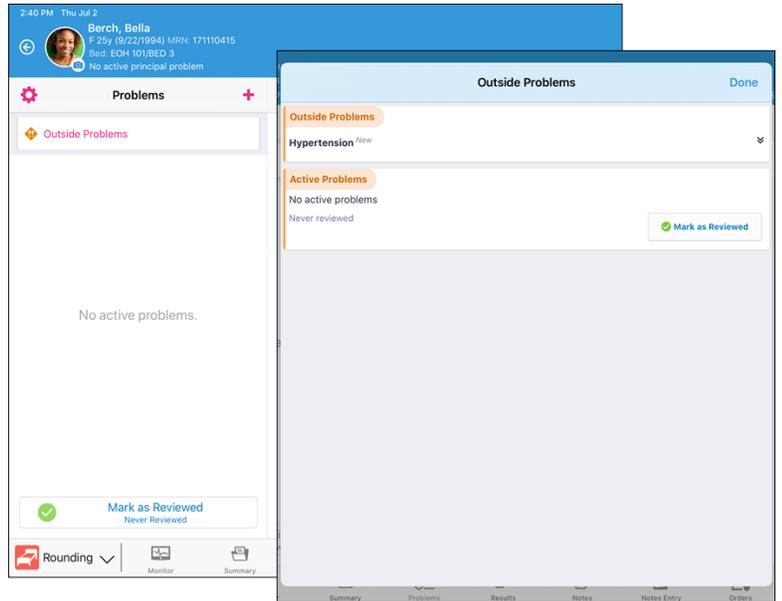
- Improved workflow.

Description:

The **Canto Problems** activity in the **Rounding** workflow now lets you know when a patient has outside problems documented at another organization that need review.

How to:

- Tap to review the list.



Can't Act on a Best Practice Advisory in Mobile? Defer it for Later

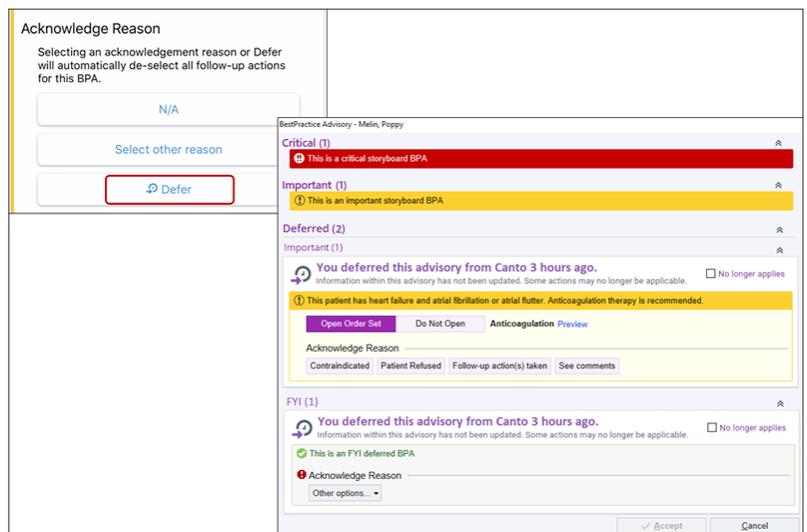
Key Benefits:

- Improved workflow.

Description:

If a BPA appears in **Haiku** or **Canto** that you can't immediately address, tap **Defer** to snooze the BPA until you can log back into a workstation and act on it.

Deferred BPAs appear alongside non-deferred BPAs in Storyboard. You can either act on the deferred BPA, acknowledge it or indicate that it no longer applies using a check box.



Note Writing



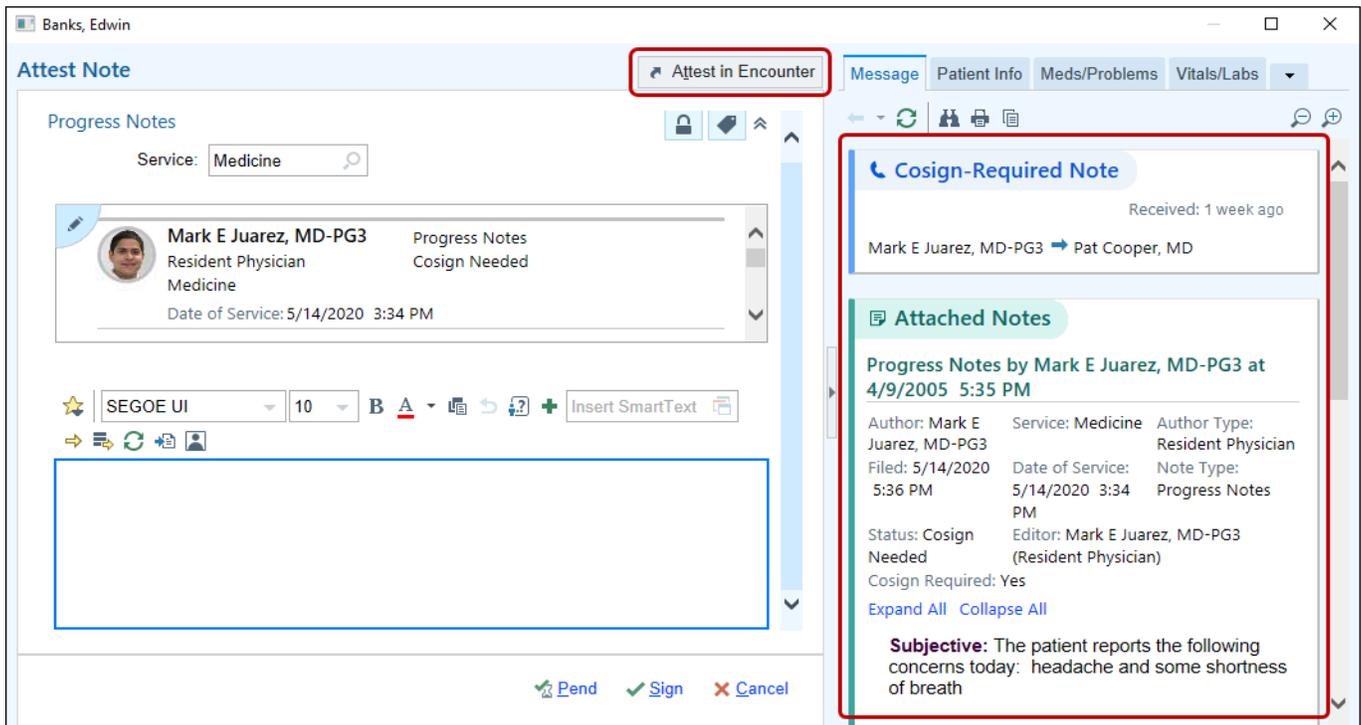
Write Notes from In Basket in a Clean, Focused Workspace

Key Benefits:

- Time saver.

Description:

When you edit or attest to notes from **In Basket**, the note editor now appears in a floating window. Review **In Basket** reports to the right of your note and if you need more information from the patient's chart, click **Edit in Encounter** or **Attest in Encounter** to pend your note and reopen it in the sidebar of the patient's chart.





Edit in Encounter, in the Sidebar

Key Benefits:

- Time saver.

Description:

When you click **Edit in Encounter** to edit a note from **In Basket**, the note appears in the sidebar rather than in a separate window. This makes it easier to search the patient's chart for the information you need to complete your note.

The screenshot shows the Epic EMR interface. At the top, a navigation bar includes buttons for 'Cosign', 'Attest', 'Edit', 'Encounter', and 'Edit in Enc' (which is highlighted with a red box). Below this is a breadcrumb trail: 'Message', 'Patient Info', 'Meds/Problems', 'Vitals/Labs', 'My Last Note', and 'Help'. The left sidebar shows the patient's profile for Edwin Banks, including his photo, name, gender, age, date of birth, MRN, and phone number. It also lists his PCP (Marty Seeger, MD) and coverage. The main content area displays a 'Cosign-Required Note' by Mark E Juarez, MD, for Pat Cooper, MD. Below this, there is a section for 'Attached Notes' with a sub-header 'Progress Notes by Mark E Juarez, MD-PG3 at 6/23/2020 3:15 PM'. The note details include: Author: Mark E Juarez, MD; Service: Medicine; Author Type: Resident Physician; Filed: 6/23/2020 3:19 PM; Date of Service: 6/23/2020 3:15 PM; Note Type: Progress Notes; Status: Cosign Needed; Editor: Mark E Juarez, MD (Resident Physician); and Cosign Required: Yes. The 'Subjective' text reads: 'The patient reports the following concerns today: headache and some shortness of breath'.





SmartPhrase Manager Has a New Look and Streamlined Workflow

Key Benefits:

- Improved workflow.

Description:

It's now easier to search, share and copy **SmartPhrases**.

The screenshot shows the 'SmartPhrase Manager' interface for user 'MD, ROBERT SUTTON [50001]'. The interface includes a navigation sidebar on the left with options like 'SmartTexts', 'SmartLists', 'SmartPhrases', 'Manage Phra...', 'SmartLinks', and 'Find SmartLinks'. The main area displays a table of SmartPhrases with columns for Name, Description, Editors, and ID. The first row is highlighted.

Name	Description	Editors	ID
CLINEXAM	CLINICAL: Screening examination. Clinical breast examination performed by the technologist toda...	MD, ROBERT SUTTON	101634
BASEEXAM	CLINICAL: This is a baseline examination. *** FINDINGS: Bilateral XCCL, CC, and MLO views wer...	MD, ROBERT SUTTON	101635
FINALASSESS	FINAL ASSESSMENT: BIRADS: Category 0 - Incomplete. The imaging department will send a lett...	MD, ROBERT SUTTON	101636
CLINSCREEN	CLINICAL: Screening. Clinical breast exam performed by the technologist today was negative for...	MD, ROBERT SUTTON	101637



Order Entry



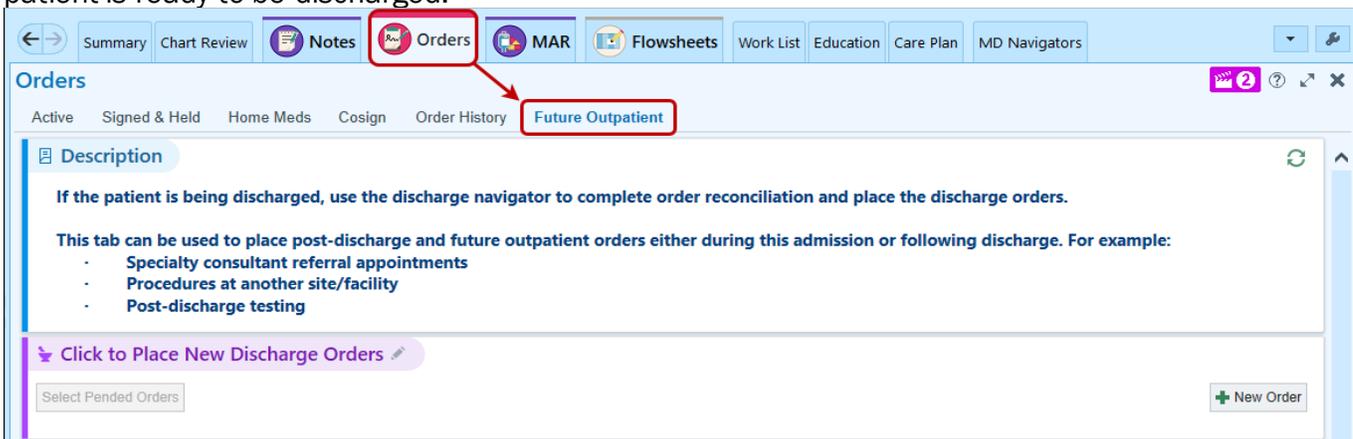
Place Future Outpatient Orders from Manage Orders

Key Benefits:

- Improved workflow.

Description:

Conveniently place future outpatient orders for currently admitted patients from the **Manage Orders** activity, prior to discharge. **Note:** You must still complete **Discharge Medication Reconciliation** when your patient is ready to be discharged.



Problem List



A New Look for Diagnosis Association

Key Benefits:

- Improved workflow.

Description:

The windows you use to associate diagnoses and problems with orders have a new, modern look. The workflow hasn't changed, but the windows look a little different, and fields appear in a slightly different order.

The screenshot displays two overlapping Epic software windows. The background window is titled "Diagnoses Search - WORDEN, LOUISE" and shows a search for "headache". It contains a table of search results with columns for External ID, Name, Code, and Code Set. The foreground window is titled "Associate Diagnoses" and shows a "New Problem" form for "Headache". The form includes fields for "Problem", "SNOMED CT", and "Display", all containing the word "Headache". It also features several checkboxes: "Hospital problem" (checked), "Principal problem", "Chronic", and "Share with patient". A "Present on admission?" section has buttons for "Yes", "No", and "Clinically undetermined". At the bottom, there are fields for "Noted" (5/19/2020) and "Resolved", along with "Add to Hx", "Make Active", "Accept", and "Cancel" buttons.

External ID	Name	Code	Code Set
R51D:ICD-9-CM	Headache	R51	ICD-10-CM
486045	Headache, short unilat neuralgiform, w/conjunctival injection/tearing	G44.059	ICD-10-CM
524467	Headache above the eye region	R51	ICD-10-CM
1475344	Headache affecting lower half of face	R51	ICD-10-CM
1599639	Headache after spinal puncture	G97.1	ICD-10-CM
478296	Headache around the eyes	R51	ICD-10-CM
1237723	Headache as late effect of brain injury	G44.309, S06.9X05	ICD-10-CM
1073377	Headache as manifestation of blood transfusion reaction	R51, T80.89XA, Y84.8	ICD-10-CM
688722	Headache associated with hormonal factors	G44.89	ICD-10-CM
465949	Headache associated with orgasm	G44.82	ICD-10-CM





Click the X to Resolve Problems During Admission or Discharge

Key Benefits:

- Improved workflow.

Description:

The **Resolved** button now uses an X icon in the (1) **Admission Problem List** and (2) **Discharge Problem List** navigator sections. This provides:

- Better indication that resolving a problem will remove it from the active list.
- More consistency with other **Problem List** sections.

The image displays two screenshots of the Epic EHR interface. The top screenshot shows the 'Admission Problem List' for a patient. It features a search bar, a '+ Add' button, and a table of active problems. The first problem is 'Hypertension, uncontrolled', and the second is 'AMI (acute myocardial infarction)'. Both have 'Resolved' buttons with an X icon, marked with a red circle '1'. The bottom screenshot shows the 'Discharge Problem List' with a similar search and add interface. It includes a 'Review all problems to determine which can be resolved and which still require a plan for treatment after discharge' section. The first problem, 'AMI (acute myocardial infarction)', is highlighted in yellow and has an 'X Resolved' button, marked with a red circle '2'. Other problems include 'Hypertension, uncontrolled' and 'Seasonal allergies'. Both screenshots include 'View Drug-Disease Interactions' and 'Show: Past Problems' options.



Chart Review



See More Information About Patients on the Patient Lists Glance

Key Benefits:

- Time saver.

Description:

Click the **View Detail** icon in the **Patient Lists Glance** section of your dashboard to see a report with more information about the patient, such as an encounter summary.

	Patient Name	Age/Gender	Room/Bed	Patient Location	Primary Problem
	Liana, Abbey	33 y.o. / F	145/145-02	145-02	None
	Ranchod, Jairaj	27 y.o. / M			None



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.

Admitted - 4/30/2020 1201
Admitting provider: Hanna Pan, MD
Total duration of encounter: 11d
Admitted to inpatient: 4/30/2020 1201
Inpatient length of stay: 11d
Current Department - EEN ICU DEPT
Patient class: Inpatient
Time in unit: 11d





Hover to Discover New Demographics Information in Storyboard

Key Benefits:

- New look.

Description:

You now have easy access to more demographics information when you hover over a patient's name at the top of Storyboard in a clinical and HIM (1) or patient access (2) context.

Look for these new items, if they're documented for the patient:

- **Patient Contacts**
- **Time of Birth** (until a baby is one month old)
- **Written and Spoken Language** (clinical and HIM only)
- **Unit** (clinical and HIM only)

<p>Nusaybah Odeh (Legal) 1</p> <p>Pronouns: she/her/hers</p> <p> 26 yo, 2/17/1994 Gender identity: Female Legal sex: Female Sex assigned at birth: Female Marital status: Significant Other Ethnicity: African American</p> <p> Preferred language: English</p> <p> Employer: Betty's Pastry Shop Occupation: Baker</p> <p> MRN: <383666></p> <p> Patient Contacts Odeh, Alana (Mother) 608-555-1234 (Mobile)</p> <p> Unit: WI PRAIRIE BLUFF ED Bed: WI PB CRITICAL CARE 2 / PB CRITICAL CARE 2</p> <p> 1979 Milky Way Drive Verona WI 53593</p> <p> 608-555-1979 (Home Phone) ★ 608-555-9791 (Work Phone)</p>	<p>Nusaybah Odeh (Legal) 2</p> <p>Pronouns: she/her/hers</p> <p> 26 yo, 2/17/1994 Gender identity: Female Legal sex: Female Marital status: Significant Other</p> <p> Employer: Betty's Pastry Shop Occupation: Baker</p> <p> SSN: xxx-xx-3521 MRN: <383666> CSN: 10002147367</p> <p> Patient Contacts Odeh, Alana (Mother) 608-555-1234 (Mobile)</p> <p> 1979 Milky Way Drive Verona WI 53593</p> <p> 608-555-1979 (Home Phone) ★ 608-555-9791 (Work Phone)</p>
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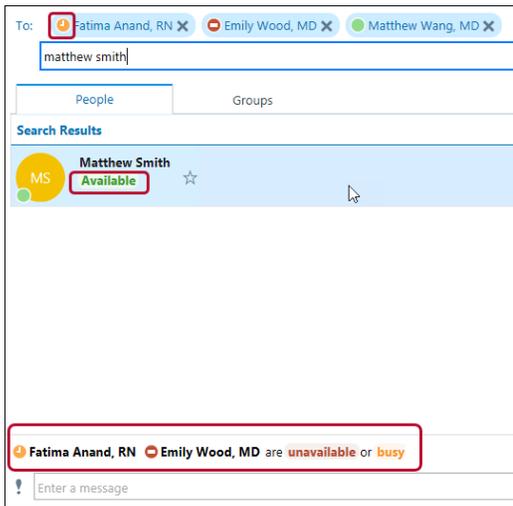
See More Clearly Whether a Colleague Is Available

Key Benefits:

- Time saver.

Description:

In **Epic's Hyperspace** and on mobile devices, availability statuses now stand out more. If someone is busy or unavailable, you can quickly see if you should contact someone else.





Quick Disclosures Are Even Faster with an Updated Activity

Key Benefits:

- Improved workflow.

Description:

The updated **Quick Disclosure** activity appears in a window instead of an activity tab.

How to:

Click **Me** to add yourself as a recipient (A) and use the **wrench** icon to update the purpose and info released speed buttons (B).





Bookmark Outside Encounters in Chart Review

Key Benefits:

- Improved workflow.

Description:

See a broader view of your patient's care on the **Bookmarks** tab in **Chart Review** by reviewing and bookmarking encounters from outside organizations.

The screenshot shows the 'Chart Review' interface with the 'Encounters' tab selected. The table below lists several encounters, with the third row highlighted in blue. A red box highlights the bookmark icon in the first column of this row, and a tooltip shows the text 'Admission for tonsillitis'.

When	Type	With	Description
04/30/2020	Patient Message	FP - Shin, E	
04/26/2020	Office Visit	Audiology - McKinley, R	Abnormal otoacoustic emission
03/20/2020	ED	EM - Alice Tsui, MD	Acute tonsillitis due to infection
03/05/2020	Office Visit	FP - Jones, J	Bilateral low back pain without





Easily See Treatment and Therapy Plan Information in Storyboard

Key Benefits:

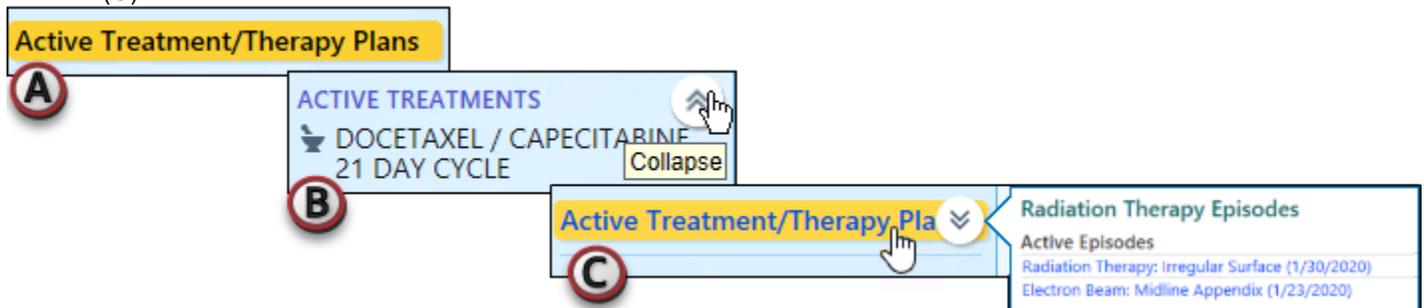
- Time saver.

Description:

You now have more control over how you see a patient's cancer treatment and therapy plan information in Storyboard.

How to:

- If a patient has an active treatment or therapy plan, you can expand the highlighted banner (A) to show more details.
- Hover over the banner and click the **chevrons** to collapse or expand the section (B).
- Your preference for expanding the section is then saved. If a patient has active radiation therapy episodes, treatments or therapies, that information now appears when you hover over the section (C).



New
Look



Find and Communicate with Care Team Members More Easily

Key Benefits:

- Improved workflow.

Description:

Use new features in the **Care Teams** window in **Patient Lists** to quickly find and communicate with team members:

- A. Search for team members.
- B. Send Secure Chat messages.
- C. Use icons to view current Secure Chat availability.

Care Teams (Aesop, Walter)

Current Encounter

[+ Add Team Member](#) [+ Add Me](#) [+ Add Team](#)

Team Member	Start	End
Attending		
 Pat Cooper, MD Phone: 608-271-9000 Pager: 608-255-8836 Fax: 608-271-7237 Attending	6/17/2020 9:26 PM	
White Team Primary Team Remove Edit Remove Primary		
Specialty: Internal Medicine Pager: 831-3447 Chat with Team		
 Pat Cooper, MD Attending MD	6/17/2020 9:26 PM	
 Mark E Juarez, MD-PG3 Resident Chat	6/17/2020 9:26 PM	6/21/2020 4:45 AM

[Show Past Members](#)

