

# Feb. 21 Epic *Update Companion*



## Physician Organization Central Business Office Staff

Updated: 1/26/21

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

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

- Coders
- Cash Applications Representatives
- Insurance Follow-up Representatives

## Top Changes for Role/Department:

1. [Guarantor Account Maintenance now has one Inquiry tab.](#)
2. [Navigate the updated Claim Edit workqueues.](#)
3. [More efficient charge review workqueues.](#)
4. [Quickly review and act on transactions.](#)
5. [Transfer to system-suggested guarantors.](#)



*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: **pbadm**

Playground Password: **epic**

Key workflows for you to practice include:

- Open a guarantor account in Guarantor Account Maintenance and explore the new Inquiry activity tab.
- Open a claim in a claim edit workqueue and explore the Storyboard, Details, and Claim Edit sidebar.
- Open a charge review workqueue and explore the updated screen.



## Account Maintenance



### Simple Filters in Inquiry

#### Key Benefits:

- More efficient

#### Description:

Fill out the simple filters at the top of the screen and then click **Apply Filters** to quickly filter out transactions in inquiry. Click **Advanced filters** for more specialized filters.

The screenshot displays the 'Prof Tx Inquiry' interface. At the top, there are navigation tabs: 'Guar Summary', 'Guar Acct Note', 'Prof Tx Inquiry' (active), 'Patient Summary', 'Coverages', 'Guar Account Edit', 'Statement History', 'Correspondence List', and 'CRM List'. Below the tabs, there are utility buttons: 'Refresh', 'Guar List', 'Prev Guar', 'Next Guar', 'Functions', 'Finish', 'Go To', 'Hide Filters', and 'Advanced Filters'. A 'Filters' section is highlighted with a red box, containing fields for 'Tx #', 'Service Date', and 'Billing Provider'. The 'Billing Provider' field has a search icon. To the right of the filters is a 'Clear All' button and a 'Filters Applied' button, also highlighted with a red box. Below the filters, a summary line shows 'Undistributed: (Count: 1; Amount: -1,194.20)'. There are tabs for 'Visit Accounts', 'Invoices', and 'Transactions'. A transaction is highlighted in blue: '10/8/2015 Texans Sboirthree Visit Acco... 45000005... McLendon, Terry Bowman, MD in INT...'. Below this is a table of transactions:

Tx#	Description	Modifiers	Status	CSN	Service	Amount
11	99214 (CPT®)-PR OFFICE OUTPATIENT VIS...		Auto W/O	2003010041984	MCLENDON,...	314.00
79	1015-TIME OF SERVICE PAYMENT/FRO...		Left Later			-188.40
12	5023-DISC PRG SELF PAY					-125.60

A 'Filters Applied' pop-up window is visible, showing the applied filters: 'Billing Provider: MCLENDON, TERRY BO...' and 'Service Date: 10/8/2015'. On the right side of the interface, there is a sidebar with a search icon and a list of patient information, including '10/8/2015: Visit McLendon, Terry Bowman, MD in INT... MED CLEAR LAB...'. At the bottom right, there is a 'Coverages' link.





## Transfer to System-Suggested Guarantors

### Key Benefits:

- Improved workflow

### Description:

The **Transfer** action in inquiry is now a one-stop shop for transferring to **Hospital** and **Professional Billing**. When transferring transactions to **Professional Billing**, click **suggested guarantors** to see target guarantors associated with your source guarantor.

	Insurance	Self-Pay	Total
MILSON,IMOGEN - 4455 Dental	0.00	24.00	24.00
MILSON,IMOGEN - 112372 Personal/Family	6,190.37	1,696.79	7,695.91

Transfer Options

Open guarantor account after transfer

Comment





## 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. The 'Account Maintenance' button is highlighted with a red box. The interface includes a navigation bar with icons for 'Open Chart', 'Triage', 'Appt Desk', 'Apply Template', 'Account Activities', 'View Notes', and 'Benefit Collection'. Below the navigation bar, the patient's name 'Smith, Jenny' is displayed. The 'Adm Date' is 11/8/2013 and the 'Adm Time' is 11:43 PM. The 'IP Adm Date' is 11/8/2013 and the 'IP Adm Time' is 11:43 PM. An 'Auth/Cert ID' field is visible on the right side of the window.



## Billing



### Quickly Process Back-End Refunds with Amount Shortcuts

#### Key Benefits:

- Financial benefit
- Time saver
- More efficient

#### Description:

We've added new **Undistributed** and **Total** amount shortcuts to the **Refund activity**. These shortcuts automatically select individual charges to source the refund. You can still manually select individual charges for a refund by clicking **Advanced**.

**Refund** 17.50 of 30.00

Refund Code  
REFUND [1018]

Amount  
**Undistributed** Total Advanced  
17.50

Send To  
**Guarantor (Default)** Patient Other  
CRICHTON, JOHN  
123 N Moya Rd  
Suite 5  
PORT ORANGE Florida 32123

Reasons  
Overpayment

Comment

Additional Information

Print Refund Slip

Print Now Don't Print

No refund slip will be printed.





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

### Key Benefits:

- Time saver
- Improved workflow
- More efficient

### Description:

**Enterprise Self-Pay Payment Posting** has been redesigned to be more visually friendly and to help you speed up your workflow with improved filters, based on account statuses, for manual distribution. In this example, you can de-select **On Payment Plan** to hide payment plan accounts as you distribute a payment.

The screenshot shows the 'Distribution' section of the Epic software. At the top, there are tabs for 'Patient Responsibility' and 'Other', with 'Advanced Filters' to the right. Below this, a table titled 'Hospital Accounts (1 of 2 accounts selected)' is visible. The table has columns for 'Acct ID' and 'Self-Pay Status'. Two rows are shown: one with Acct ID 4000000610 and status 'Pmt Plan', and another with Acct ID 4000001273 and status 'No Stmt'. A modal window is open over the table, showing a filter menu for 'Outstanding' with three options: 'On Payment Plan' and 'Not on Statement', both of which are checked. At the bottom of the modal are 'Apply' and 'Cancel' buttons. Below the table, there are buttons for 'Reset', 'Clear Distribution', and 'View Las'.

Acct ID	Self-Pay Status
4000000610	Pmt Plan
4000001273	No Stmt





## Use Quick Distribution Shortcuts in Payment Collection

### Key Benefits:

- Time saver

### Description:

When manually distributing payments in **Payment Collection**, you can use new quick shortcuts to filter by **Patient Responsibility** or **All Balances** with a single click. **All Balances** appears only if there are non-MyChart accounts or in-progress accounts to show. You can click **Other** for a variety of other context-specific filters.

Outstanding Self-Pay

Marley B. Leamon  
P/F #112590

**Pay Now** **Due**

**Professional** 1,910.85

Bad Debt: 42,126.00 ⓘ  
Total Outstanding: 44,036.85 ⓘ

**Distribute** Manual ✎

Include: **Patient Responsibility** All Balances Other ▾ Advanced Filters ⚠ Remaining to Distribute 500.00

Collecting 500.00



## Charge Review



### More Efficient Charge Review Workqueues

#### Key Benefits:

- More efficient

#### Description:

**Charge Review Workqueues** are now more consistent and efficient with other workqueues:

- You can use the **SmartText comment field** that appears when you click **Delete** to save and access comments you use multiple times.
- The **Review** button is now the **Edit** button.
- The options on the **Go To** and right-click menus are more focused on the activities you're likely to perform.

The screenshot displays the Epic Charge Review interface. At the top, it shows 'Charge Review ALL PENDED CHARGES [432] Last refreshed: 5/5/2020 3:06:20 PM'. Below this is a table of charges with columns for Status, Service Date, Patient, Account, Coverage, Department, Place of Service, and Amount. A 'Delete Charge' dialog box is open in the foreground, featuring a 'Comment' field and 'Delete' and 'Cancel' buttons. To the right, a 'Go To' menu is visible, listing various actions like 'Appointment Desk', 'Bundled Episode Review', 'Chart', etc. The interface also includes sections for 'Session History' and 'Original Charge Details'.

Sts	Svc Date	Patient	Account	Coverage	Department	Place of Service	Amount
	05/20/2005	HLM,BPA MED	HLM,BPA MED		JMM FAMILY PRACTICE	Model System	0.00
	10/01/2019	JJCHARLE,CA...	JJCHARLE,...		QA MYCHART PHARM...	Model System	5.97
	01/31/2020	KONKLE,ELLI...	KONKLE,EL...		KLB EMERGENCY DEPT	Model System	18.00
	05/16/2019	LEIBEE,AGAT...	LEIBEE,AGA...	RFL QA PAYO...	INITIAL DEPARTMENT	Model System	72.79
	05/16/2019	LEIBEE,AGAT...	LEIBEE,AGA...	RFL QA PAYO...	INITIAL DEPARTMENT	Model System	123.08
R	06/25/2019	LEIBEE,SETH	LEIBEE,SETH	RFL QA PAYO...	INITIAL DEPARTMENT	Model System	0.00





## 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**

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Pending Adjustments/Refunds

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

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**Charges**

Select All Deselect All Filters

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

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

Total (9)  
**1,845.60**

Show Cost

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**Adjustments**

Reverse Transfer

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

Total (3)  
**-2,713.92**





## Meet the Improved Charge Entry Batch Activity

### Key Benefits:

- More efficient

### 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.

**Batch 21**  
EHS SERVICE AREA

User: PB\_ADMIN  
Sessions: 7

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

Dr hash: 2176148 / 2176148  
Prov hash: 645578 / 789002

### Charge Entry Batch - 21 (Open)

**Summary**

Service Area: EHS SERVICE AREA (10)

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**

#	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 COLLAGE...	09/04/2020		FAMILY MEDICINE, PHYSIC...	99901 - EMH UNASSIGNED...	EMC FAMILY MEDICINE	1

**Batch is not balanced**

Batch Report    Reject Batch    Close Batch    Process Batch



## Claims



### Navigate the Updated Claim Edit Workqueue

#### Key Benefits:

- More efficient
- Improved workflow

#### 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.

The screenshot displays the 'PB Claim Edit' interface. On the left, there is a user profile for Thomas Baker (40 years, 11/3/1979, Guar ID: 3340, Personal/Family EHS SERVICE AREA) and patient information for MRN: 205355. The main area shows a table of claims with columns for Score, Status, Invoice #, Account Name, Payor Name, Amount Due, # Errors, Timely Filing, Min Service Date, Form, and Account Type. Below the table, a detailed view for 'Invoice P1000003960' is shown, including a 'Claim Summary' card with a red 'Error Claim' icon and a 'Claim Errors' card listing two errors: '100 Invalid claim mailing address for coverage payer AETNA: all address items are missing. [Rule 71108]' and '200 Claim max days are exceeded. [70402]'. The interface also includes navigation buttons like Refresh, Filter, Previous, Next, Edit, Dgfer, Transfer, Test All Claims, Resubmit All OK, Claim Actions, and Go To.

Score	Status	Invoice #	Account Name	Payor Name	Amount Due	# Errors	Timely Filing	Min Service Date	Form	Account Type	E
60	New	P1000003960	BAKER, THOMAS	AETNA	34.00	2	-8	11/03/2017	CMS Claim	Personal/Family	0
60	New	P1000003970	MILSON, TESSA	AETNA	204.00	2	-8	11/03/2017	CMS Claim	Personal/Family	0
60	New	P1000003980	GONZALES, CHRIS...	AETNA	64.00	2	-7	01/11/2018	CMS Claim	Personal/Family	0
60	New	P1000003990	KNUDSEN, NATE	AETNA	200.00	2	-7	01/15/2018	CMS Claim	Personal/Family	0





## 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.

**PB Claim Edit**  
Claim Edit ADMIN-CATCH ALL QUEUE [203] Last refreshed: 5/19/2020 1:32:02 PM

**Thomas Baker**  
40 years, 11/3/1979  
Guar ID: 3340  
Personal/Family  
EHS SERVICE AREA

608-555-1414  
tbaker@gmail.com

**BALANCES**

Total	Ins:	238.00
238.00	SP:	0.00
	Undist:	0.00

**PATIENT**  
MRN: 205355  
Patient is the Guarantor  
Coverages

- 1 AETNA - AETNA HMO
- 2 BCBS IN STATE - BCBS IN...
- 3 ALLIANCE - ALLIANCE

**Guarantor Demographics**  
**THOMAS BAKER** [3340] (P/F) EHS SERVICE AREA

**Birthdate** 11/03/1979, 40 years  
Male (Legal sex)  
xxx-xx-5113 (SSN)

**Language** English

**Address** 1623 School Street  
PACKWAUKEE WI 53953

**Phone** 608-555-1414 (Home)

**Email** tbaker@gmail.com (Patient)

**MyChart Status:** Receives paper billing. Guarantor does not use MyChart.

**Communication preferences** Receives billing emails. [Manage preferences](#)

**Electronic payment method information** No electronic payment method on file. [Manage payment methods](#)





## Fix Errors Faster with the Redesigned Claim Edit Assistant

### Key Benefits:

- Time saver
- 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 for a claim with Invoice P1000005480. The interface is organized into several sections:

- Header:** Guarantor: THERRA, PETER A. Invoice: P1000005480 Payer: MEDICARE Form: (E) CLAIMS PB CEV 837 V5010 PROFESSIONAL
- Left Sidebar (Patient Info):** Peter A. Therra, 48 years, 1/30/1972, Guar ID: 5268, Personal/Family, EHS SERVICE AREA. Contact: 608-111-1111, pt@sunsten.com. Balances: Total 442.00, Ins: 442.00, SP: 0.00, Undist: 0.00. Patient MRN: 208022. Coverages: 1. AETNA - AETNA PPO, 2. MEDICARE - MEDICARE PART...
- Main Content Area:**
  - Claim Summary:** Invoice P1000005480 | E-CMS MEDICARE | MEDICARE PART A AND B. Total Charges: 178.00. Claim Mailing Address: MEDICARE, 123 ANYWHERE STREET, VERONA, WI 53593.
  - Recent History:** Today, 8:33 AM. Comment added. Contacted payer.
  - System Context:** Form: CLAIMS PB CEV 837 V5010 PROFESSIONAL [30890001], Payer: MEDICARE [400001], Plan: MEDICARE PART A AND B [40000101], Place of Service: EHS CLINIC [10501], Location: EHS CLINIC [10501], Department: EMC FAMILY MEDICINE [10501101].
  - Claim Attachments:** Attachment Record ID: 1385, Attachment Control Number: 2539, Type Code: Radiology Reports [RR], Mail [EM], Status: Not Generated, Output Method: Printer.
  - Claim Edit Workqueues:** Table with columns Workqueue and Days.
- Right Sidebar (Claim Errors):** Claim Edit > P1000005480. Showing 6 Active Errors. Filter options: User, Master File, External, Overridden. Error list:
  - Insurance ID Format is Not Valid:** Extension 70176, 100 - Registration. Invalid subscriber identification number. Edit Claim Values - Subscriber, Registration - Coverage.
  - Claims Check Whether MSPQ is Filled:** Extension 3087122201, 100 - Registration. Medicare Secondary Payer Questionnaire is not complete and the coverage list contains a Medicare coverage.
  - Claim Max Days Exceeded:** Extension 70402, 200 - Billing. Claim max days are exceeded. Invoice Inquiry.





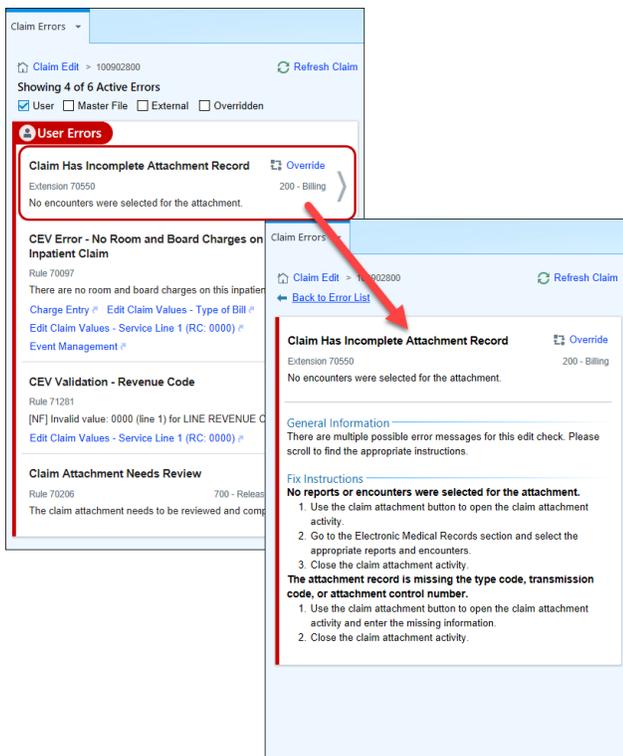
## Find Fix Instructions in New Claim Edit Assistant Sidebar

### Key Benefits:

- More efficient
- Less clicks

### Description:

Fixing a claim? Click **errors** in the new **Claim Edit Assistant** sidebar to see the fix instructions. Make sure you read them all before addressing the problem. The new sidebar doesn't stay open when you go to activities in separate workspaces, such as **Registration**.





## Find Information About Prior Payments in New EOB Sidebar

### Key Benefits:

- Improved workflow
- Time saver
- More efficient

### Description:

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

The screenshot shows the 'Remittance Image (7/22/2020)' sidebar in the Epic system. It is divided into three main sections:

- Payment from COMMERCIAL PAYOR:**
  - Invoice Number: HB429020023
  - Adjudication Date: 07/22/20
  - Claim Status Code: Billed
  - Amount: 258.00
  - Paid: 129.00
  - Patient Responsibility: 0.00
  - Claim Filing Indicator Code: ICN
  - Value: 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 Amount

PR2	38.75
CO45	38.75

Rev Code 0960 Svc Dt: 07/22/20

Billed	Paid	Mods	Qty
103.00	51.50	—	1

Reason Code Amount

PR2	25.75
CO45	25.75



## Insurance Follow-up



### Contract Variance Reporting Gets a New Look

#### Key Benefits:

- More efficient

#### Description:

**Contract Variances** and **Undercharging reports** have an updated look now that they're based on **Reporting Workbench templates**. You can refine what data appears in the reports by modifying parameters, adding columns, and grouping data by up to four groupers. In the **Variances report**, you can include overpayments, allowing you to review all variances in one place.

PB Contract Variances							
Report Settings		Summary					
Date range by payment posting date:	1/1/2020 - 1/30/2020	Invoice Count	Billed Amount	Expected Allowed	Payer Allowed	Absolute Variance	% Absolute Variance
Service area:	All	2	1,000.00	1,000.00	900.00	100.00	10.00 %
Group by:	Payer, Location, Invoice Procedure						
INDEMNITY PAYOR [2759001]							
RAY Location							
Invoice Procedure		Invoice Count	Billed Amount	Expected Allowed	Payer Allowed	Absolute Variance	▼ % Absolute Variance
99211 - OFFICE/OUTPT VISIT & EST [7950]		2	1,000.00	1,000.00	900.00	100.00	10.00 %
<b>RAY Location Total</b>		<b>2</b>	<b>1,000.00</b>	<b>1,000.00</b>	<b>900.00</b>	<b>100.00</b>	<b>10.00 %</b>
<b>INDEMNITY PAYOR [2759001] Total</b>		<b>2</b>	<b>1,000.00</b>	<b>1,000.00</b>	<b>900.00</b>	<b>100.00</b>	<b>10.00 %</b>
<b>Grand Total</b>		<b>2</b>	<b>1,000.00</b>	<b>1,000.00</b>	<b>900.00</b>	<b>100.00</b>	<b>10.00 %</b>





## 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.

Payment and Adjustment History								Collapse All
Showing all insurance and self-pay payments and adjustments, currently or previously matched to the charges.								
Posted	Tx #	Code	Matched	Payer				
06/08/20	285	1021-WRITE-OFF (INSURANCE)	-16.67	PAYOR				
06/08/20	284	1013-INSURANCE PAYMENT	-125.00	PAYOR				
ICN:	None	Printable EOB						
Procedure	Mods	Billed	Allowed	Patient	COB	Paid		
Auto-distributed		900.00	800.00	50.00	—	750.00		
NAA		CO 45 - CHGS EXCD FEE SCH/MAX ALLOWABLE				100.00		
NRP		PR 3 - Co-payment Amount				15.00		
NRP		PR 2 - Coinsurance Amount				25.00		
NRP		PR 1 - Deductible Amount				10.00		



## General Updates



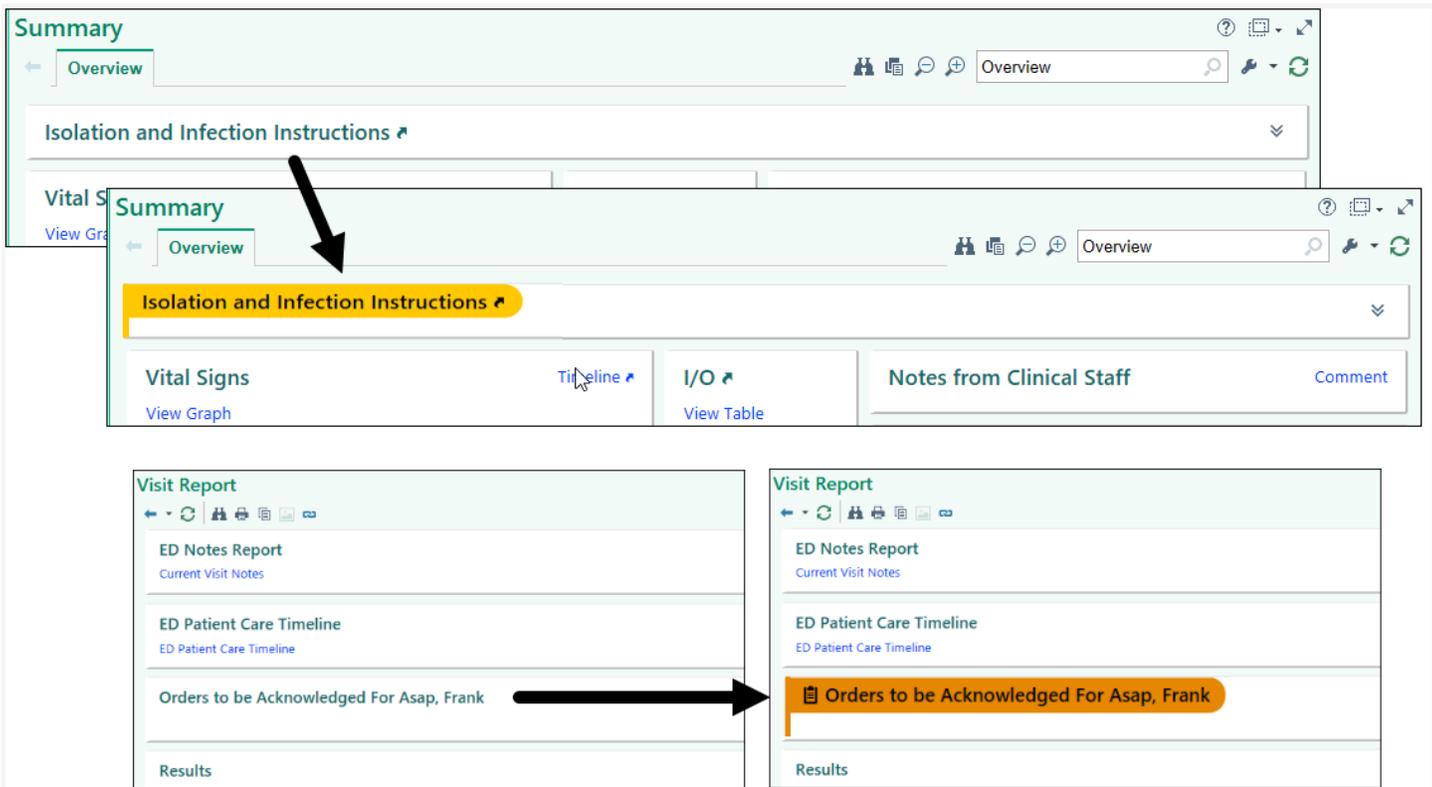
Colored Headers for Important Information More Consistently Appear for Users with Fewer Colors Setting

### 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.



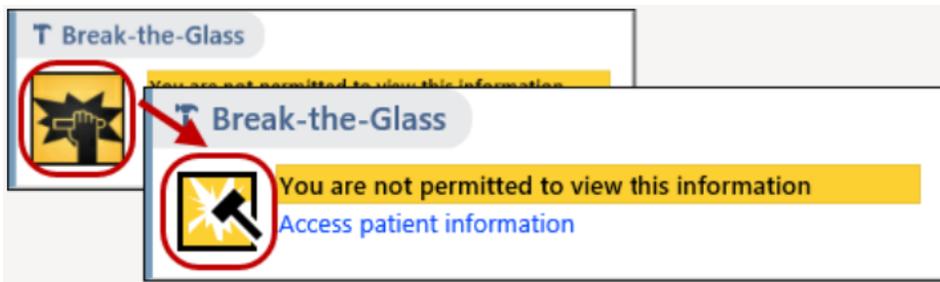
## New Break-the-Glass Icon in Reports

### 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.



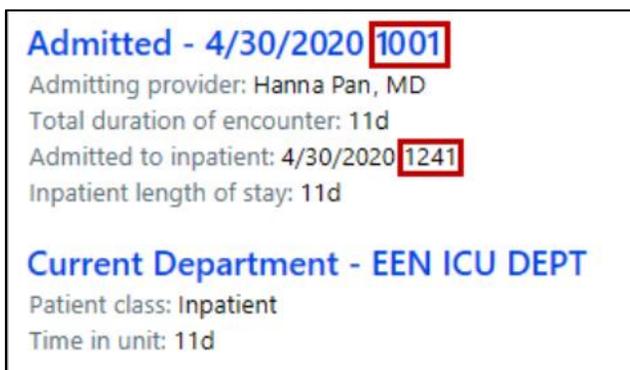
## See a Patient's Admission Time in Storyboard

### 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 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:

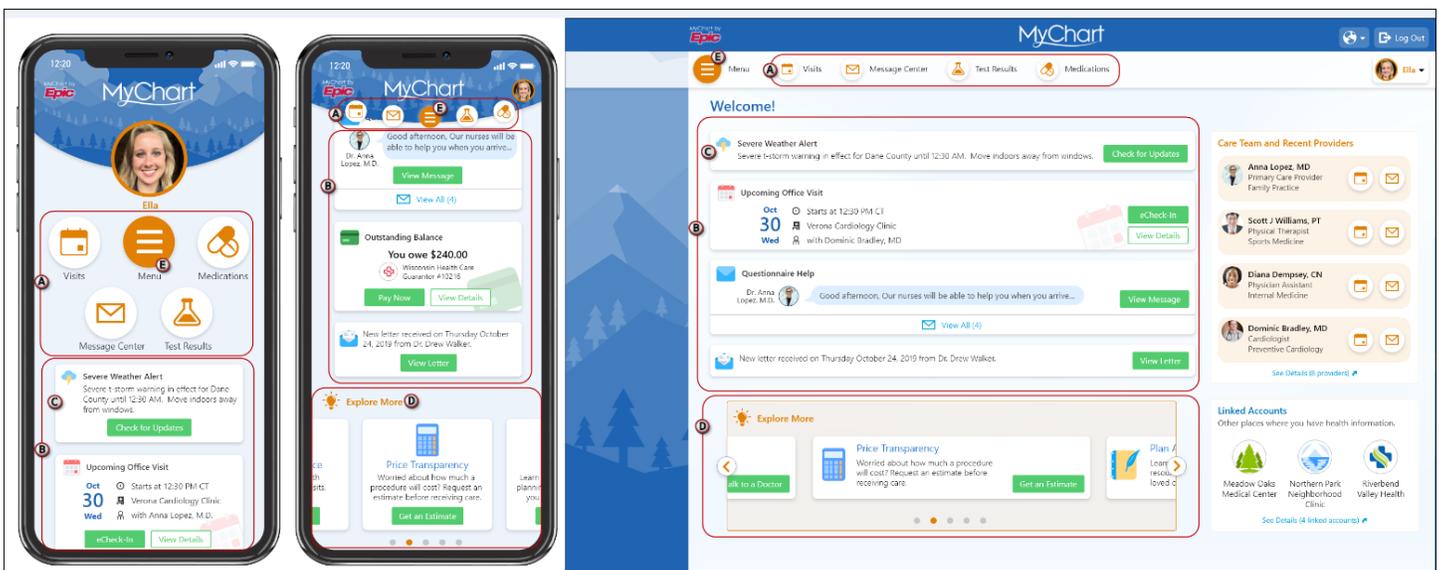
- Improved workflow
- More efficient

 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 to log.

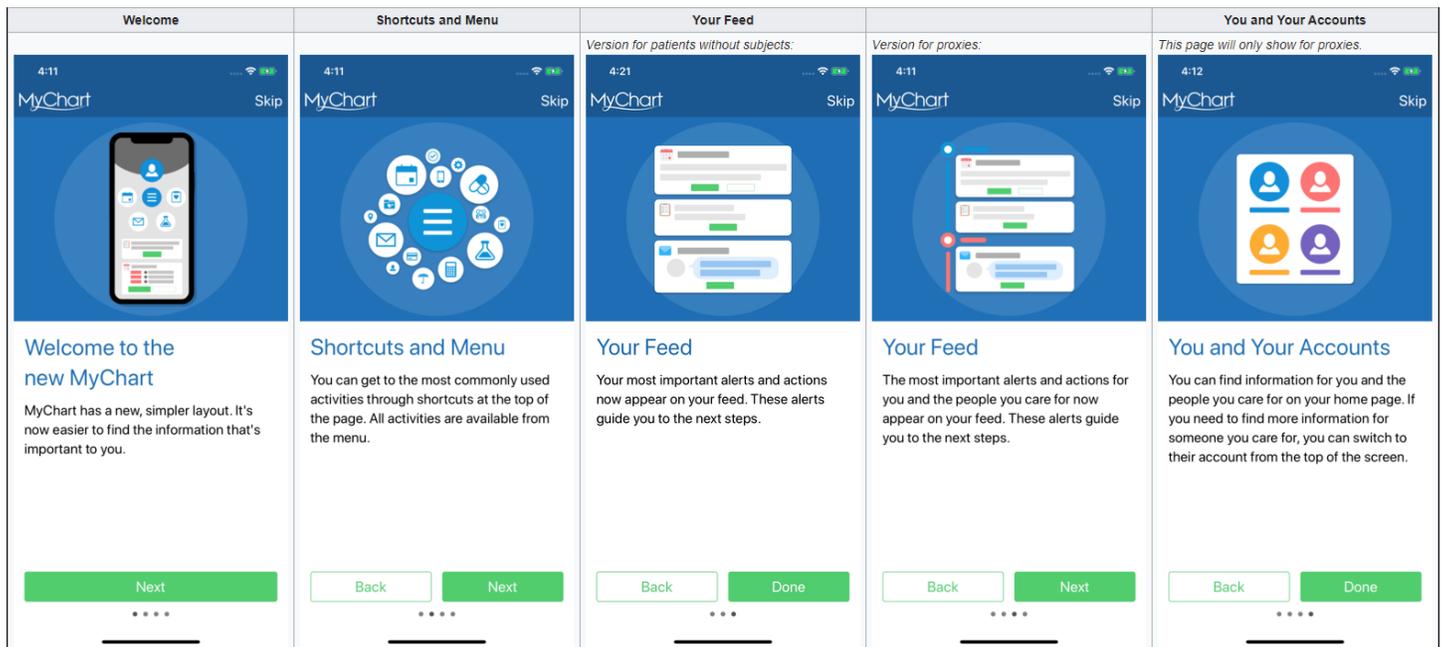
Patients must update the mobile app to version 9.3 or higher to view the changes. An overview of changes will appear when they first log in.



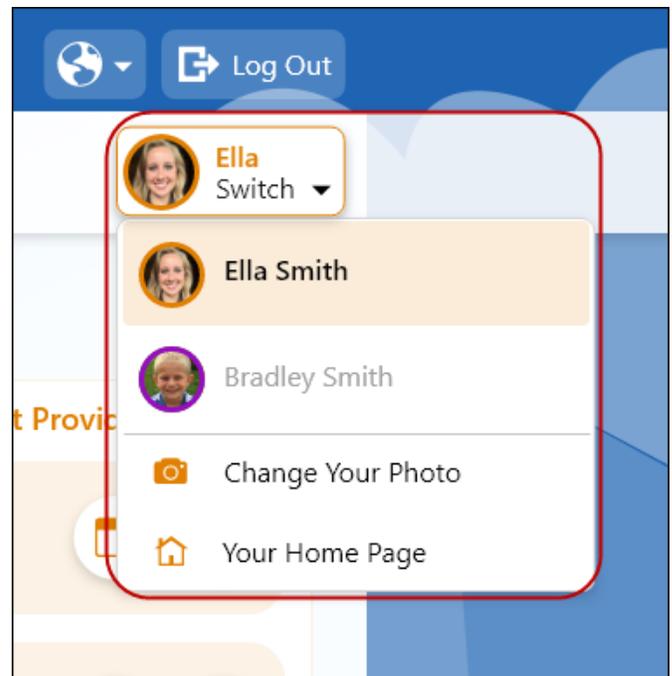
- Shortcuts on the homepage provide easy access to the four activities a patient uses the most.
- The **health feed** is a consolidated view of actionable health updates, including appointment reminders, check-in tasks and messages from the patient's care team.
- Information for proxies and patients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

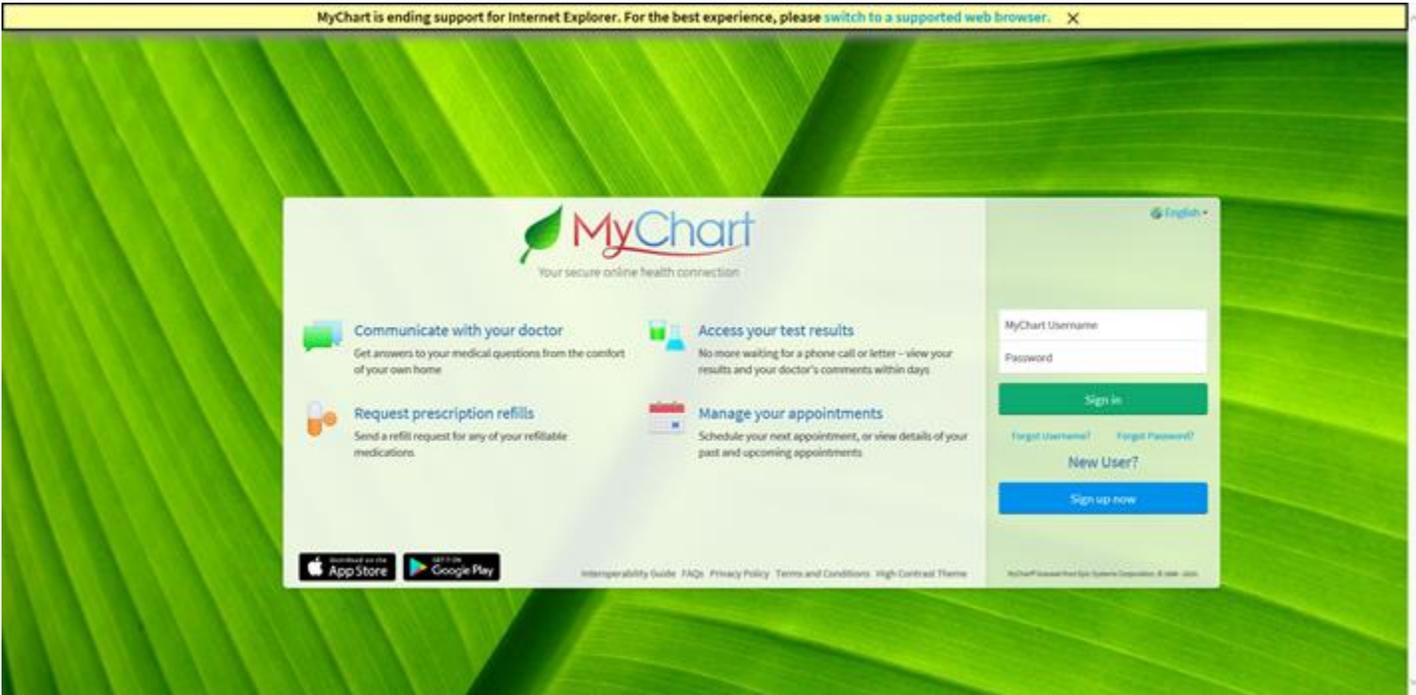
### Description:

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**      Category Select

**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:

Notice status:

Communication barriers:

Notice adjustments:

Service	Addition
1 URINALYSIS, AUTO, W/SCOPE	

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.

