

Feb. 21 Epic *Update Companion*



Perioperative Staff

Updated: 1/22/21

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:

- Perioperative Nurses
- Surgical Schedulers
- Preference Card Builders
- Charge Posters

Top Changes for Perioperative Staff:

1. [Filter Events with Fewer Clicks](#)
2. [A New Way to Document SDOH](#)
3. [A New Look for Case Depot Settings](#)
4. [Preference Card Edits Update All Sections for New Cases and Logs](#)
5. [Improved Posted/Unposted Logs Report](#)



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: pre00-pre10 (AOD/Pre-op/Phase II)
circ00-circ10 (Intra-op Nurse)
pacu00-pacu10 (Recovery Nurse)
orsched00-orsched10 (OR Scheduler)
orpcb01-orpcb10 (Preference Card Builder)
orcharg00-orcharg10 (Charge Poster)

Playground Password: **train**

Key workflows for you to practice include:

- Submit Your Ideas with Epic
- A New Look for Case Depot Settings
- An Improved Posted/Unposted Logs Report



Perioperative Nurses



Filter Events with Fewer Clicks

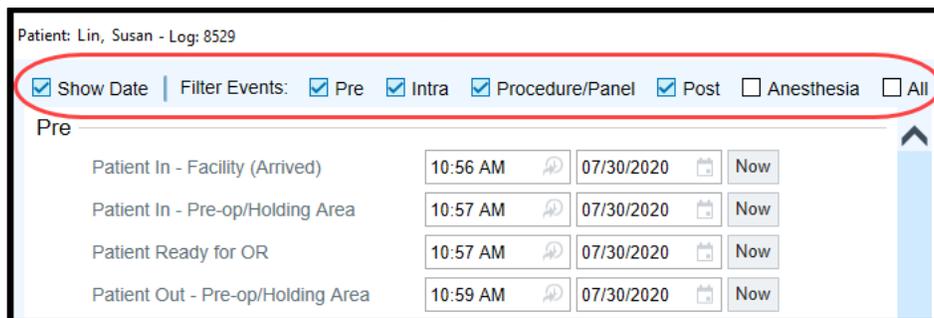
Key Benefits:

- Time Saver

Description:

All check boxes in the **Event** window, where you document case tracking and procedure/panel events, appear without you needing to click the wrench icon, allowing you to filter events quickly..

Filtering events is also more straightforward. A **Procedure/Panel** check box is included with other filter options to select which events appear, instead of a **Show procedure/panel times?** check box. Because procedures and panels appear only for intra-op events, selecting and clearing the **Intra-op** check box also selects and clears the **Procedure/Panel** check box





A New Way to Document Social Determinants of Health

Key Benefits:

- Less Clicks

Description:

A new window appears where you can document a flowsheet for the corresponding domain. This behavior is consistent with what already happens for the Depression, Postpartum Depression and Housing Stability domains. Note that for the Tobacco Use domain, the **History** activity still opens.

The screenshot displays the Epic Social Determinants of Health interface. At the top, a purple header reads "Social Determinants of Health". Below it is a circular menu with various icons representing different domains. The "Food Insecurity Present" domain is highlighted in red. To the right, a "History" window for "Food Insecurity" shows a timeline starting from 5/2017 to Today, with a red bar indicating "Food Insecurity Present" from Feb 20 2020 to Today. Below the timeline, two statements are listed: "Worried About Running Out of Food in the Last Year" and "Ran Out of Food in the Last Year", both with a "Sometimes true" status. The main window below shows a "Food Insecurity" flowsheet with a time taken of 5/20/2020 at 1530. It contains two statements: "Within the past 12 months, you worried that your food would run out before you got the money to buy more." and "Within the past 12 months, the food you bought just didn't last and you didn't have money to get more." Both statements have a "Sometimes true" status and a "Patient refused" option. The interface includes standard Epic navigation and action buttons like "Accept", "Accept and New", and "Cancel".





Submit Your Ideas with Epic

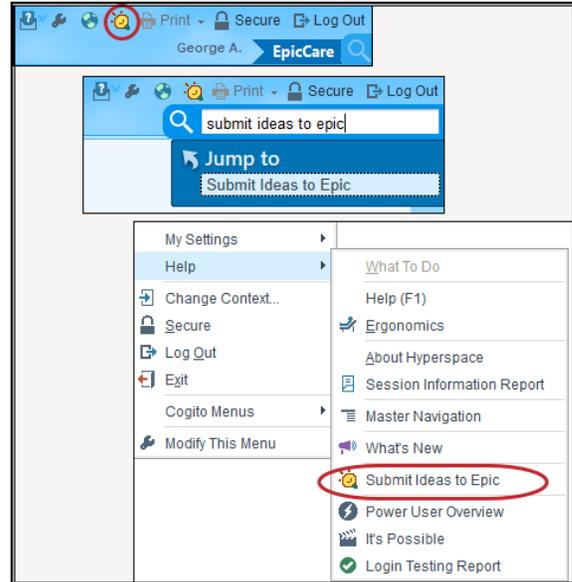
Key Benefits:

- Improved Communication

Description:

Submit ideas for enhancements and view ideas to ideas.epic.com within Epic by one of three methods:

1. Click a new lightbulb icon on the main toolbar in Epic on your workstation.
2. Use **Chart Search** (search: "Submit Ideas to Epic").
3. Select the **Submit Ideas to Epic** option on the **Help** menu (**Epic button > Help**).



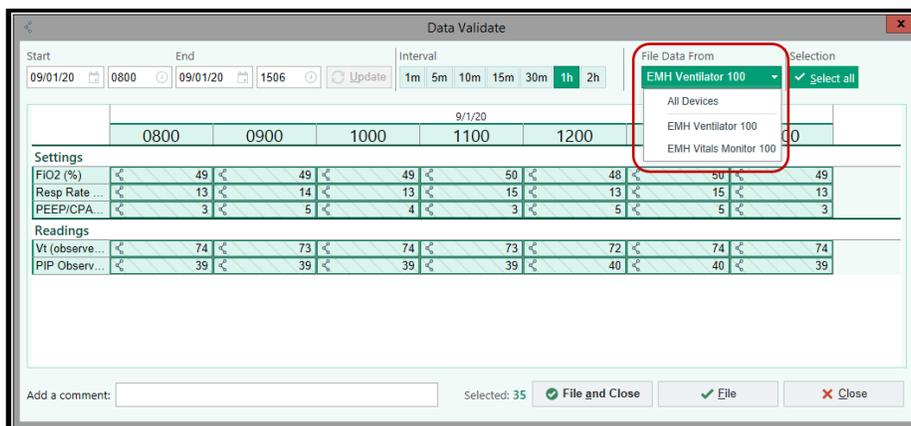
Filter Devices in the Data Validate Activity

Key Benefits:

- Time Saver

Description:

You can now filter information in the **Data Validate** activity to focus only on the data from a single device. This is especially helpful when multiple devices show unvalidated data at the same time in the **Data Validate** activity. To filter data, select a device from the dropdown menu in the **File Data From** field.





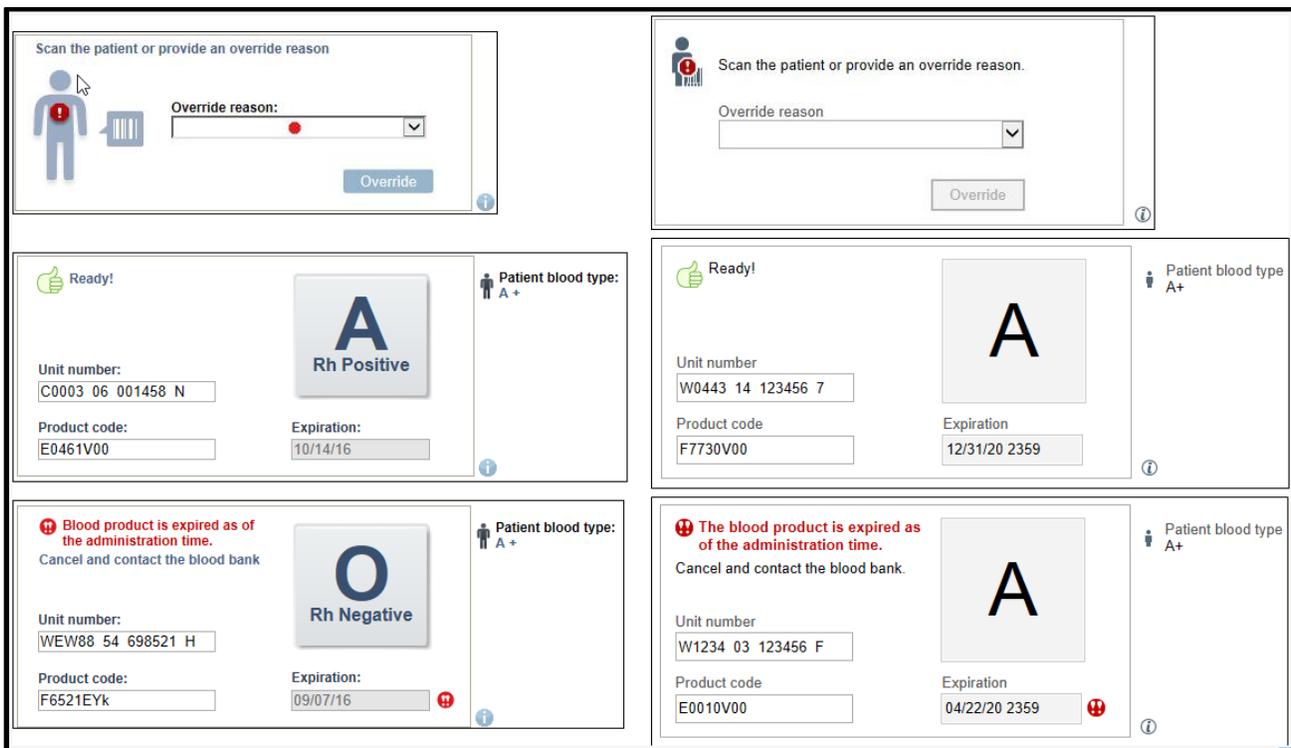
Updated Look for the Blood Product Administration Module

Key Benefits:

- Improved Communication

Description:

The **Blood Product Administration Module** has an updated look that better reflects the look and feel of other activities. Some icons and elements on the screen have a cleaner, flatter look.





Use a Status Board or Surgical Cases Report Instead of a Pre-op and Post-op Appointment Report

Key Benefits:

- Time Saver

Description:

Use a **Status Board** report or a **Surgical Cases** report to see pre-op and post-op appointment status.

| Appt Status | Trav Pre-op S... | Inf | Iso | Phone | Patient Info | Location | Pt Class | Procedures |
|-------------|------------------|-----|-----|------------------|-------------------------------------|----------|----------|--|
| ✗ | | | | Hm: 555-555-5555 | Paris, Janet Female 25 years | EMH OR | | Appendectomy, Open |
| ✗ | ✗ | | | Hm: 555-555-5555 | Paris, Janet Female 25 years | EMH OR | | Appendectomy, Open |
| ✗ | | | | | Cooper, Tessa Female 23 years | EMH OR | | Appendectomy, Laparoscopic |
| ✓ | | | | | Order, Casey Female 25 years | EMH OR | | Incision And Drainage, Knee - Left |
| ✗ | ✗ | | | | Draisait, Kailer Male 25 years | EMH OR | | Repair, Hernia, Inguinal, Laparoscopic - Bilateral |
| ✗ | | | | | Gallagher, Caulkin Male 34 years | EMH OR | | Appendectomy, Open |
| ✗ | | | | Hm: 608-555-5555 | Schmidt, Hazel C Female 41 years | EMH OR | | Arthroplasty, Knee, Total, Open - Left |



SmartPhrase Manager Has Improved User Experience and Streamlined Workflows

Key Benefits:

- More Efficient

Description:

The **SmartPhrase** activity includes new workflow changes that make it more user-friendly. Inline buttons also have been added for ease of use.

1. Switch between your phrases and system phrases.
2. Searching for **SmartPhrases** from the current **SmartPhrase** list
3. Access the **Share** and **Copy** actions through two separate toolbar buttons.

Click [here](#) for video on **Borrowing SmartPhrases**.

Click [here](#) for video on **Sharing SmartPhrases**.

The screenshot shows the SmartPhrase Manager interface for user MD, ROBERT SUTTON. The interface includes a top navigation bar with tabs for Level, User, Profile, Department, Location, Facility, and User. Below this is a toolbar with buttons for 'Share With' and 'Copy To', both circled in red and labeled with a '3'. A search box on the right is also circled in red and labeled with a '2'. The main area displays a list of SmartPhrases with columns for Name, Description, Editors, and ID. The first row is highlighted in blue and labeled with a '1'.

| 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 |





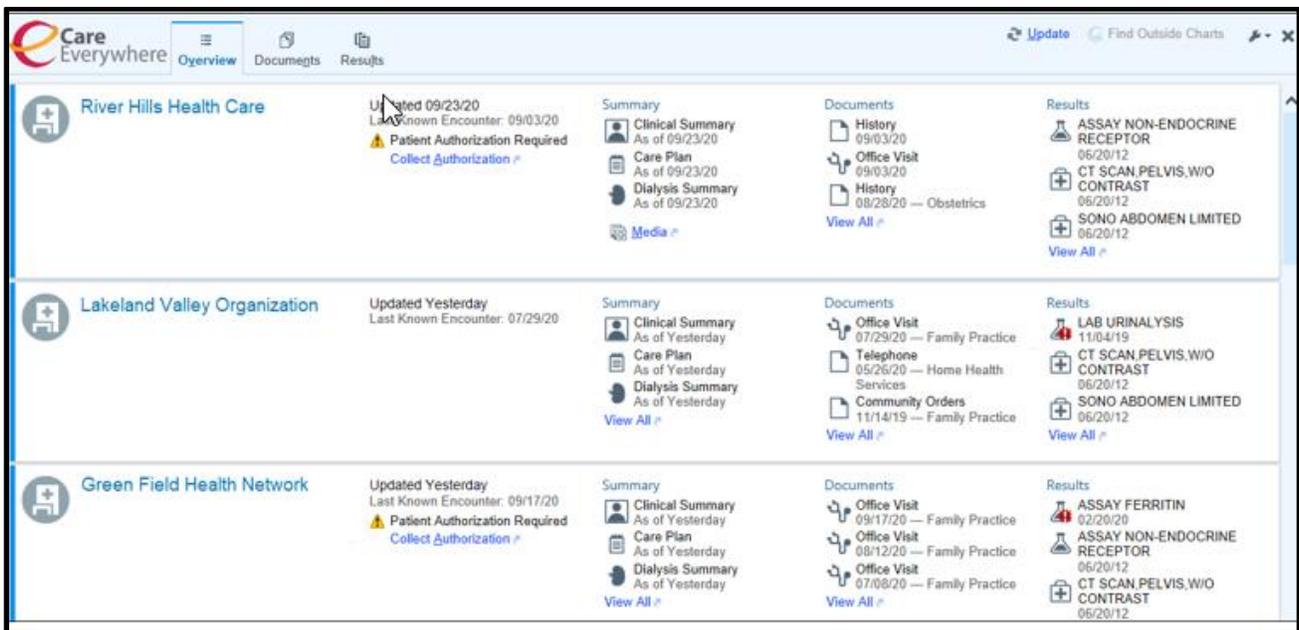
New Look and Features for the Care Everywhere Outside Records Activity

Key Benefits:

- More Visibility in Care Everywhere

Description:

The **Care Everywhere Outside Records** activity has been redesigned to make it easier for you to access the most relevant patient information and to be more consistent with **Chart Review**.



Surgical Schedulers



A New Look for Case Depot Settings

Key Benefits:

- More Efficient

Description:

The **Case Depot** report settings activity has a new look, while the basic functionality remains the same.

The screenshot shows the 'Criteria' configuration page for Case Depot. It features a search bar for 'Select Case Depot Criterion' (A), a list of criteria including 'Locations' (B), 'Created Date', and 'Add-on'. Each criterion has 'And', 'Or', 'Not', and 'X' options. At the bottom, there is a 'Use column defaults' checkbox (C) and a 'Show Criteria Summary' button (D).

Steps:

1. To add criteria, search for criteria in the **Select Case Depot Criterion** field (A) and configure it below (B).
2. The **Override individual user settings** check box is now named **Use column defaults** (C).
3. To see a summary of the report's criteria, click **Show Criteria Summary** (D).





Set a Default Depot

Key Benefits:

- Less Clicks

Description:

You can now set a specific Case, Request or Visual Depot report to be the default for a Snapboard if it generally uses that Depot report. Whenever the Snapboard is opened, the associated depot opens as well, saving you clicks.

The screenshot shows the 'Display' tab of the Snapboard report settings. The interface includes several checkboxes for display options, dropdown menus for configuration, and a table for selectable captions. The 'Default depot' field at the bottom is highlighted with a red circle and contains the text 'ASC Suites'.

| Caption | Display Name |
|---|--------------|
| Snapboard Horizontal Caption with Patient | Patient |
| Snapboard Provider & Procedure Horizontal Caption | Procedure |
| | |

Steps:

1. To set a default depot, open the **Snapboard** report settings.
2. Go to the **Display** tab.
3. Enter the depot report in the **Default depot** field.





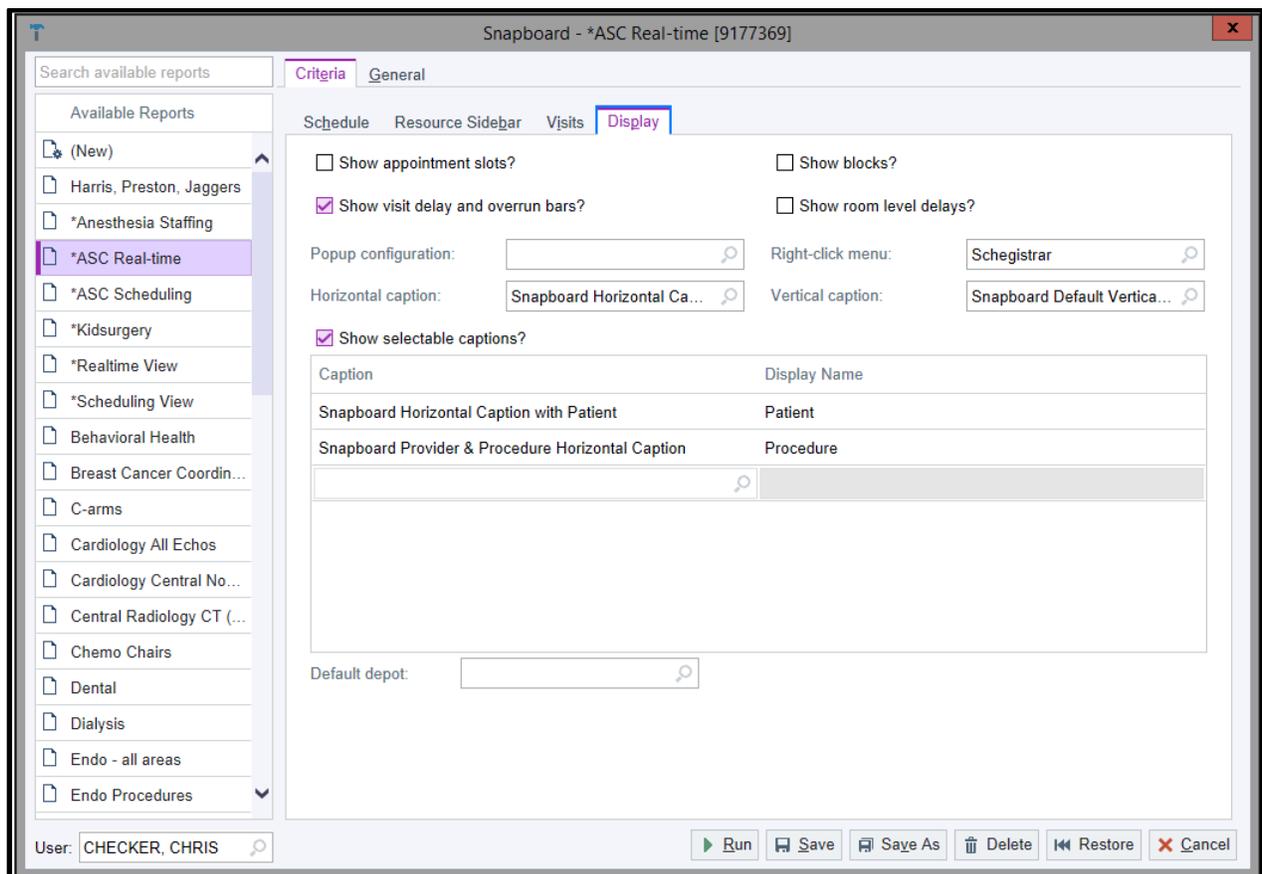
Reorganized Snapboard Report Settings

Key Benefits:

- More Efficient

Description:

Snapboard report settings are now reorganized to make it more intuitive to find the settings you're looking for. You can find the following subtabs: **Schedule**, **Resource Sidebar**, **Visits** and **Display**.





More Intuitive Report Settings for Surgical Cases, Surgical Cases (Full Screen), and Confirm Cases Reports

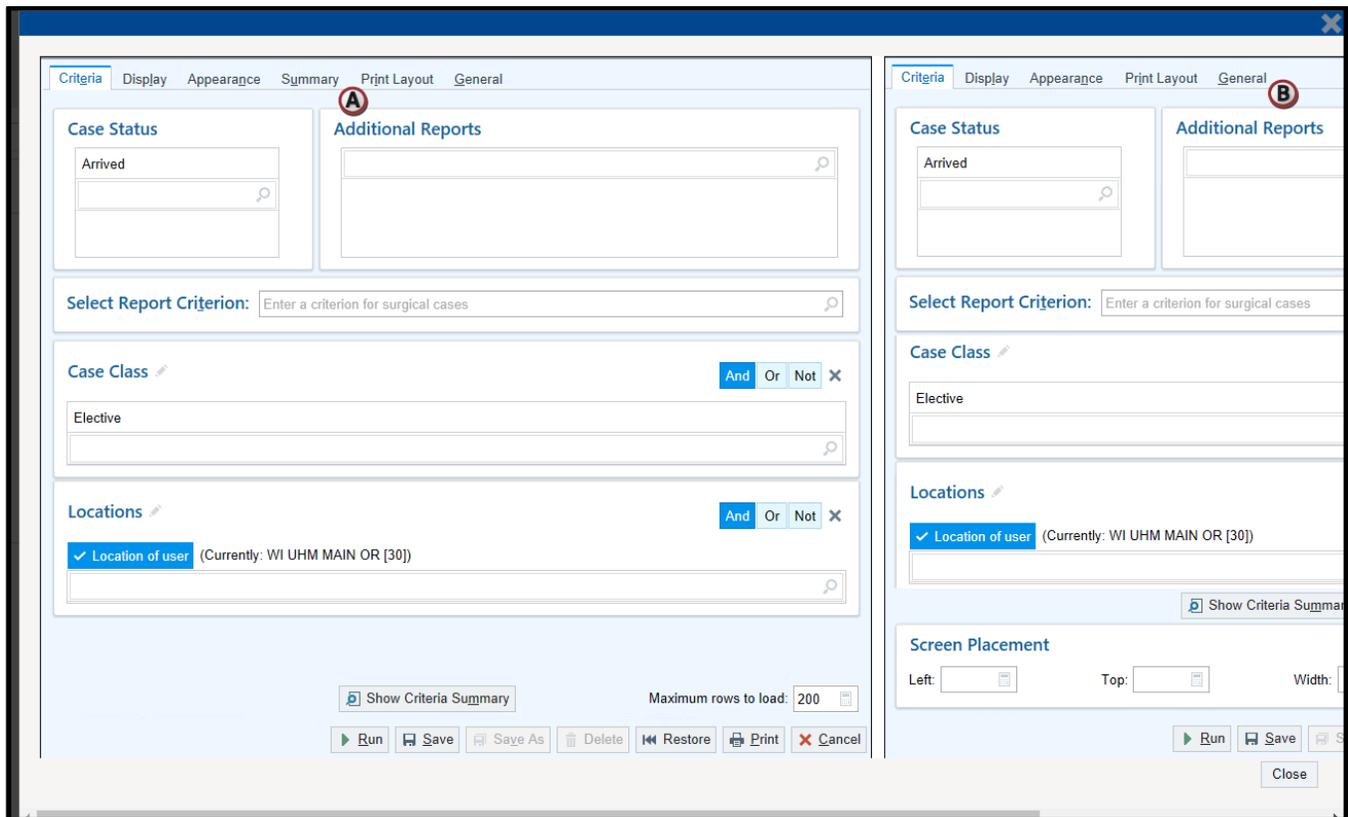
Key Benefits:

- More Efficient

Description:

The report settings window for the Surgical Cases, Surgical Cases (Full Screen) and Confirm Cases application reports has a new look, while the basic functionality remains the same. Both the **Criteria** tab and the **Summary** tab are now more intuitive and easier to navigate.

The **Criteria** tab is used by all three reports, while only the Surgical Cases and Confirm Cases reports use the **Summary** tab.





New Look for the Case Entry Supplies Section

Key Benefits:

- More Accuracy and Reliability

Description:

The **Case Entry Supplies** section has a different look which makes it easier to search. The **Search** bar is now at the top of the list and will filter as you type to narrow your search results quicker.

Supplies

Pick Lists

Total number of pick lists: 1

Procedures

Appendectomy, Laparoscopic [Imo968875]

+ Add

| Row ▲ | Supply | Open | PRN | Inv Location | Comment | Type | Mfr # | Charge |
|-------|--|------|-----|------------------------|---------|------------|-----------|-------------------------------------|
| 1 | BAG ENDO SPECIMEN RETRIEVAL REGULAR | 1 | 0 | EMH STERILE AND MAT... | | Other | ECATCH... | <input checked="" type="checkbox"/> |
| 2 | BLADE CLIPPER PREP ELECTRIC REGULAR | 0 | 1 | EMH STERILE AND MAT... | | Blade | 4406 | <input checked="" type="checkbox"/> |
| 3 | BLANKET WARMER UPPER BODY 74X24" | 1 | 0 | EMH STERILE AND MAT... | | Other | 42234 | <input checked="" type="checkbox"/> |
| 4 | CANISTER SUCTION 2000ML | 1 | 0 | EMH STERILE AND MAT... | | Anesthesia | 43206-01 | <input checked="" type="checkbox"/> |
| 5 | CATHETER FOLEY WITH BAG 16F KIT | 1 | 0 | EMH STERILE AND MAT... | | Catheter | 900016A | <input checked="" type="checkbox"/> |
| 6 | CIRCUIT ANESTHESIA WITH BAG MASK ADULT | 1 | 0 | EMH STERILE AND MAT... | | Anesthesia | AD6X2944 | <input checked="" type="checkbox"/> |



Preference Card Builders



Preference Card Edit Update All Sections for New Cases and Logs

Key Benefits:

- Improved Workflow

Description:

Any cases or logs using a preference card will have all their sections updated when editing the associated preference card. Previously, the only sections that were updated in the cases and logs were those that were updated in the preference card.

The screenshot shows a dialog box titled "Update Cases and Logs" with a close button (X) in the top right corner. The main text reads: "Update cases and logs for the following changes in Preference Card Entry for Marie Lee; APPENDECTOMY; MAIN OR (PACIFIC); General". Below this is a list of sections with checkboxes: Instruments and Staff. Underneath the list are date fields: "Start date:" with the value "8/5/2020" and a calendar icon, and "End date:" which is empty. Below the end date field is a checked radio button labeled "Indefinite". A red oval highlights the text: "Updating of cases and logs that currently do not use this preference card will have all sections updated, not just the above changes." At the bottom, there is a question "Perform updating of cases/logs?" followed by two buttons: "Update" and "Do Not Update".





A Preferable Preference Card Change Request Activity

Key Benefits:

- More Efficient

Description:

The **Preference Card Change Request** activity has a new look that puts all the information you need in one convenient place. When you click the buttons indicating the sections of the preference card you want to change, each of those sections appears on a single screen so you can make and review all of your modifications at once. Previously, each section appeared on a separate tab.

Medications ✕ Discard Changes

Add new medication + Add

| | Change Type | Amount | Unit | # Open | # PRN |
|--|-------------|--------|------|--------|-------|
| EPINEPHRINE (ANAPHYLAXIS) 1 MG/ML IJ SOLN [153507] | | 1 | ml | 1 | 3 |
| LIDOCAINE 2 % EX GEL [151329] | | 1 | Tube | 0 | 1 |

Comments:

Equipment ✕ Discard Changes

Add new equipment + Add

| | Change Type | # Open | # PRN |
|--------------------------|-------------|--------|-------|
| Heat Lamp | Modified | 1 -1 | 0 |
| Headlight Large | | 1 | 0 |
| Laparoscopic Camera Cart | | 1 | 0 |
| Suction Holder | | 1 | 0 |

Comments:

Supplies ✕ Discard Changes

Add new supply + Add

| | Change Type | # Open | # PRN |
|--------------------------------------|-------------|--------|-------|
| A SUTURE POLYSORB 0/KV-34 36" | Modified | 0 -1 | 0 -3 |
| B SUTURE SILK 3-0/P-12 18" | Removed | 0 | 0 -1 |
| SUTURE SURGIPRO 6-0/P-10 18" | Added | 1 +1 | 1 +1 |

Comments:



Charge Posters



An Improved Posted/Unposted Logs Report

Key Benefits:

- Easily Visible in Posted/Unposted Logs Report

Description:

In the **Posted/Unposted** Logs report, use the new **Comment** toolbar button to leave a comment for a log. Entering a comment can be helpful if you're waiting for more documentation on a log and want to clarify that that's why the log is remaining in the report.

