

Feb. 21 Epic *Update Companion*



Research Coordinators

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:

- **Research Coordinators**

Top Changes for Role/Department:

1. [Inactive Treatment Plans No Longer Appear by Default in Study Calendars](#)
2. [New Break-the-Glass Icon in Reports](#)
3. [Add SmartPhrases to Your Notes Using SmartLists](#)



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: **Intrc119**

Playground Password: **train**

Key workflows for you to practice include:

- Add **SmartPhrases** to your notes using **SmartLists**.
 1. Select any patient from the schedule.
 2. Select from **Research Notes** from navigator.
 3. Select the **My Research Templates** quick button.
 4. Hit **F2** to activate list, then select desired template.



Chart Review



Inactive Treatment Plans No Longer Appear by Default in Study Calendars

Key Benefits:

- Time saver.

Description:

Inactive treatment plans no longer appear by default in the **Study Calendar** section of the **Research Studies** activity and in the **Link Encounter to Timeline** window. This keeps you from accidentally linking an encounter to an inactive treatment plan. If needed, you can select the check box to show inactive treatment plans.

The screenshot shows the 'Research Studies' interface for 'BREAST CANCER STAGE II-BRCA0142'. The 'Study Calendar' section is visible, showing a table with columns for Study Visit, Date, Encounter Type, Dept, and Provider. The 'Prescriptions, Day 1 (10/8/2020)' entry is listed. In the top right of the Study Calendar section, there are three checkboxes: 'Link encounter', 'Hide Past', and 'Hide Unlinked Inactive'. The 'Hide Unlinked Inactive' checkbox is checked and highlighted with a red box.

The screenshot shows the 'Link Encounter to Timeline' window. At the top right, there is a checkbox labeled 'Show Inactive Treatment Plans (1)' which is currently unchecked and highlighted with a red box. Below this, there is a table for selecting a protocol with columns for Name, Status, ID, and Order. The table contains one entry: '(BRCA0142) DOXOrubicin / CYCLOphosphamide / Trastuzumab - Breast (Active Treatment Plan)' with Status 'Active', ID '1159000...', and Order '1'. Below the protocol table, there is a section for selecting a day with columns for Name and Tolerance Window, showing 'Prescriptions, Day 1' for '10/8/2020'.





Hover to Discover New Demographics Information in Storyboard

Key Benefits:

- Time saver.

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 are documented for the patient:

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



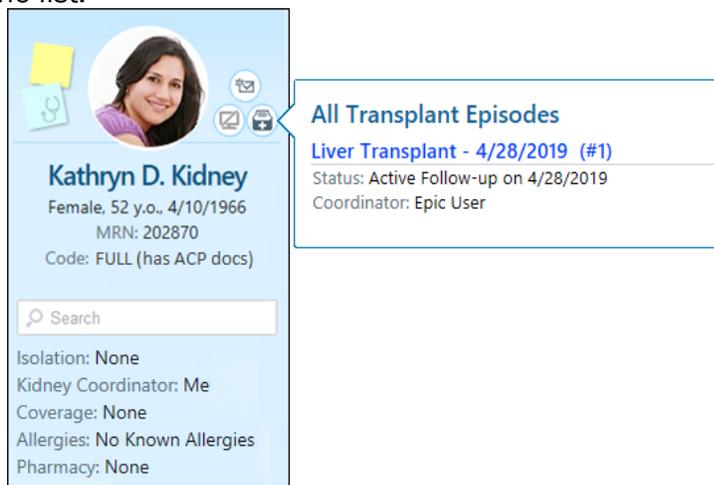
Hover over the Cooler Icon in Storyboard to See Transplant Episodes

Key Benefits:

- Time saver.

Description:

You no longer must click the **cooler** icon in Storyboard to see a list of your patient's transplant episodes – simply hover to see the list.



Kathryn D. Kidney
Female, 52 y.o., 4/10/1966
MRN: 202870
Code: FULL (has ACP docs)

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



New Look



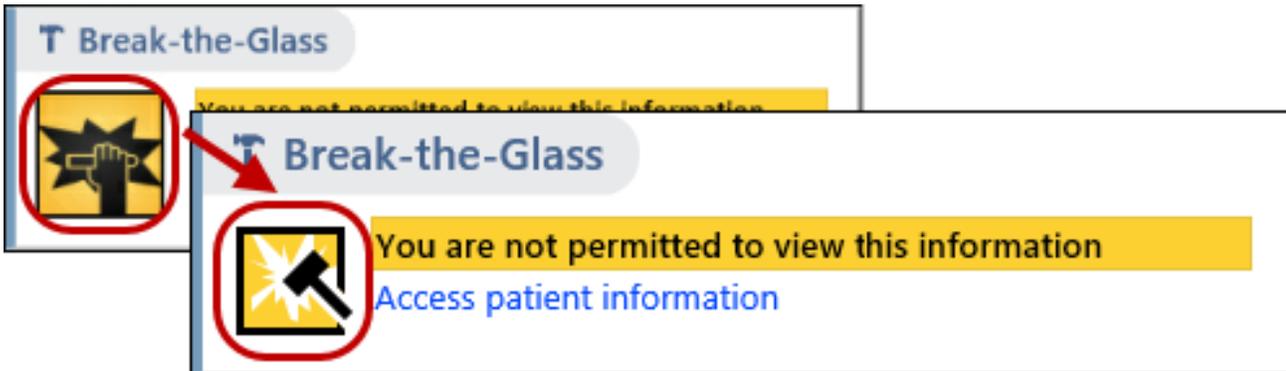
New Break-the-Glass Icon in Reports

Key Benefits:

- New look.

Description:

A cleaner visual cue in your reports lets you know when you need to break the glass to access patient information.



New Look



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

Key Benefits:

- New workflow.
- Clarity.

Description:

A check box or radio button now appears on many toolbar buttons throughout **Epic's Hyperspace** so it's clearer when a button has been selected.



Personalization



Modify Your Workspace in Epic's Hyperspace via Browser

Key Benefits:

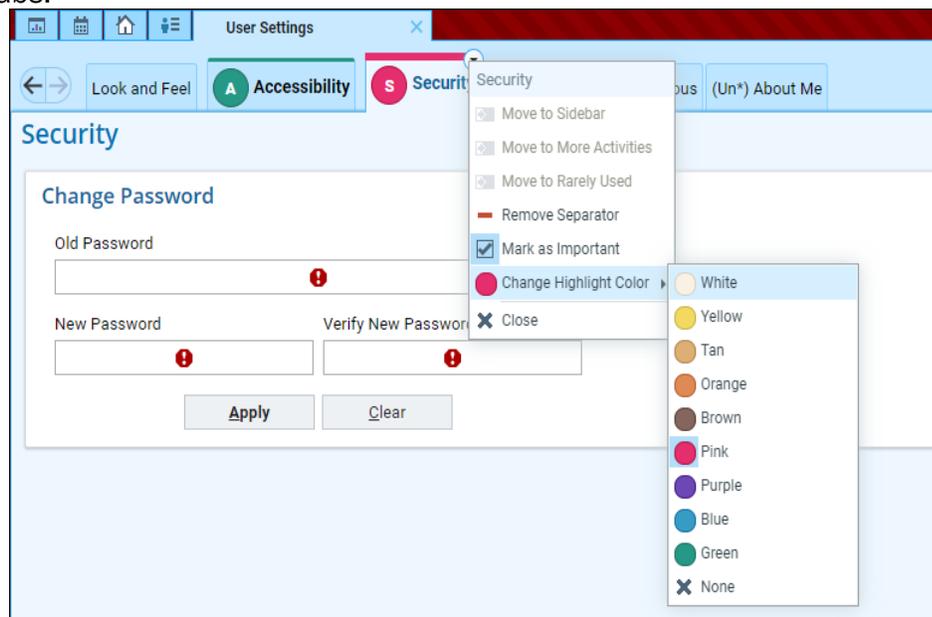
- More efficient.

Description:

Make your workspace your own.

How to:

- Drag and drop to reorganize your activity tabs.
- Right click an activity tab to update its appearance or move it to the **More Activities** or **Rarely Used** menus.
- Click the **wrench** on the far right of your activity toolbar to update whether text or icons appear on your activity tabs.





Add SmartPhrases to Your Notes Using SmartLists

Key Benefits:

- Time saver.

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's Hyperspace, Haiku and Canto**.

Example: Create a **SmartList** that includes all the **SmartPhrases** you use to document your most commonly performed procedures so you can quickly pull in any of the **SmartPhrases** by adding the same **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.





Merge Table Cells in Certain SmartText Boxes

Key Benefits:

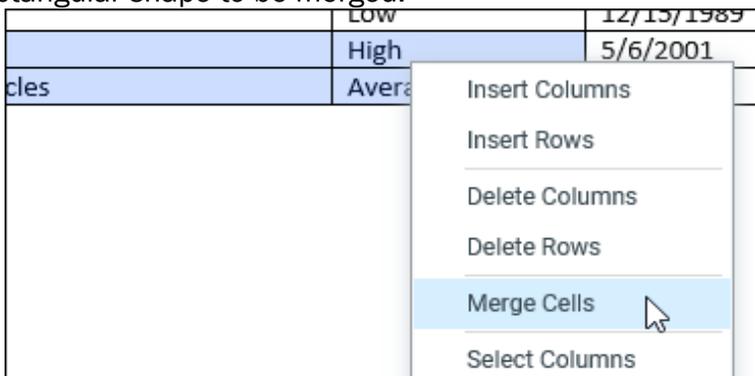
- Timer saver.

Description:

You can now merge the cells of tables you use in certain **SmartTool**-enabled text boxes in **Epic's Hyperspace**, such as **Flowsheet** notes.

How to:

Highlight the cells you want to merge, right click, and select **Merge Cells**. Selected cells must be adjacent and form a rectangular shape to be merged.



It's Now More Obvious When You're Viewing Information for a Deceased Patient

Key Benefits:

- Time saver.

Description:

When you open an **In Basket** message or the chart for a deceased patient, the circle containing the patient's photo or initials is now grayed out and surrounded by a black border.

