

Feb. 21 Epic *Update Companion*



Single Billing Office Leadership

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:

- Directors
- Managers
- Supervisors

Top Changes for Role/Department:

1. [Revenue and Usage report is now called HB Posted Charges Summary Report and is in Reporting Workbench.](#)
2. [Report on COVID-19 information in Denials Report.](#)
3. [Easily create payment plans from Enterprise Guarantor Summary.](#)
4. [Use quick distribution shortcuts in Payment Collection.](#)
5. [Paste like a pro in Hospital Account Lookup.](#)



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.



Reporting



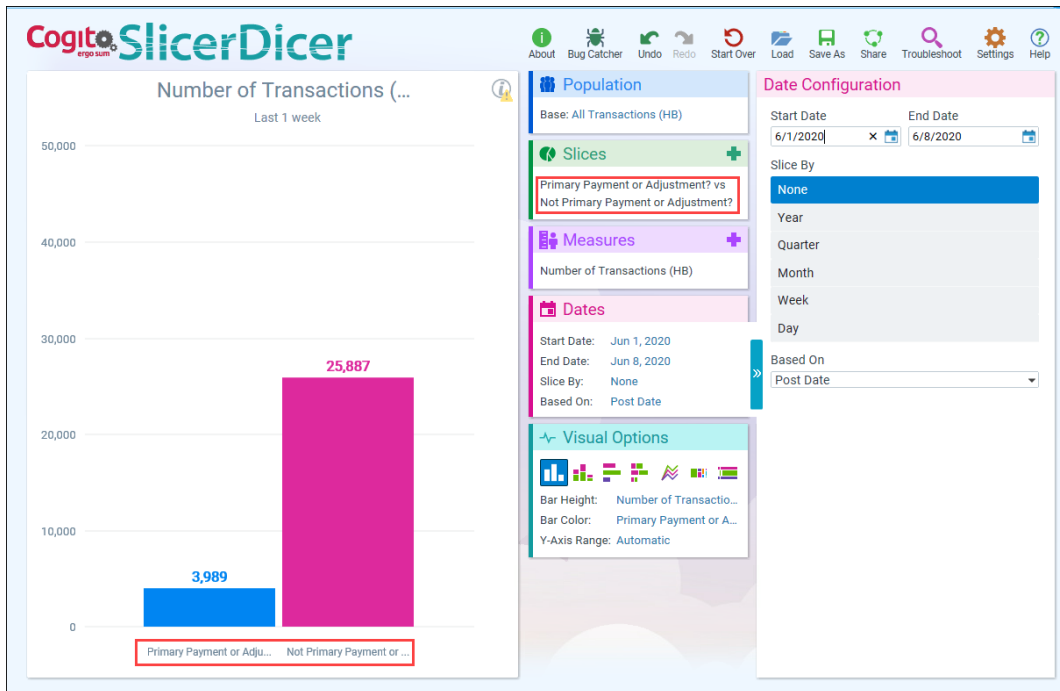
Sort by Primary Payer in Transactions Data Models

Key Benefits:

- Financial benefit

Description:

Use a new filter to sort transactions data based on whether a given payment or adjustment came from the primary payer on a patient's account. This filter can help you investigate payer trends and potentially identify areas for improvement in collecting payments from primary payers.





Meet the HB Posted Charges Summary Report

Key Benefits:

- More efficient

Description:

The **Hospital Billing Revenue and Usage report** has a new name: the **HB Posted Charges Summary report**. It has been migrated to **Reporting Workbench**, so you can now schedule reports to run automatically at specified times and export the results to a spreadsheet.

HB Posted Charges Summary				
Report Settings		Summary		
Date range by post date:	5/30/2020 - 6/4/2020	Charges	Quantity	Amount
Grouped by:	Primary Financial Class, User	-14,257	-14,489	87,496.46
Service areas:	All			Late Charges
				0
Additional Report Settings				
Financial classes:	Commercial, Medicare, Medicaid, Self-Pay			
Commercial				
User ^	Charges	Quantity	Amount	Late Charges
HB, BACKGROUND [HBCKGRND]	-627	-627	4,807.35	0
Commercial Total	-627	-627	4,807.35	0
Medicaid				
User ^	Charges	Quantity	Amount	Late Charges
HB, BACKGROUND [HBCKGRND]	-86	-86	1,294.91	0
TANG, TED [8836]	66	66	11,550.00	0
Medicaid Total	-20	-20	12,844.91	0





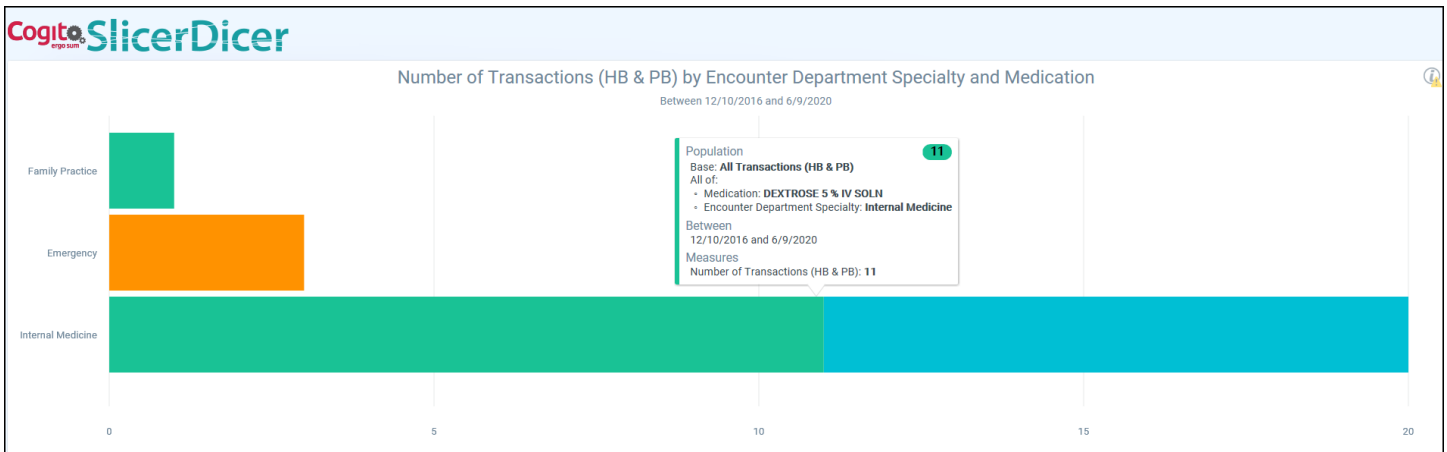
Sort Billing Data by Charge Source, Encounter Department, and More

Key Benefits:

- Financial benefit
- More efficient

Description:

We've added several new **SlicerDicer** filters to match some of the data used for the **HB Posted Charges Summary Report**. For example, you can now see which medication transactions originate from any given specialty area within your organization.



Single Billing Office Leadership Feb. 21 Epic Update Companion



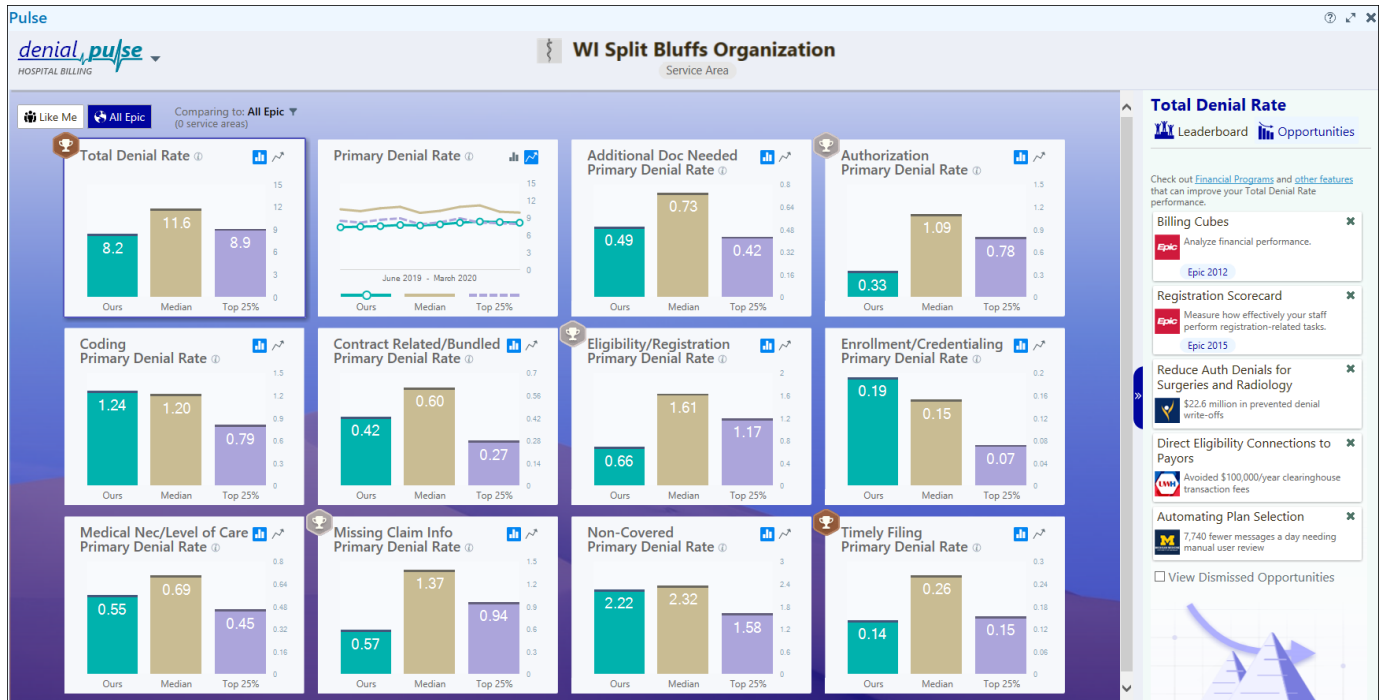
See How Your Denial Rates Measure Up

Key Benefits:

- Financial benefit

Description:

You can now compare denial rates and reasons with the broader Epic community using **Denial Pulse**, available alongside both **Financial Pulse** and **Automation Pulse**. The new dashboards allow you to perform benchmarking against other Epic organizations and help you identify opportunities to increase your revenue cycle efficiency.





Report on COVID-19 Information in Denials Reports

Key Benefits:

- Financial benefit

Description:

To help you investigate and follow up on COVID-19 denials, use new criteria such as billing indicators and claim diagnosis codes in your **Denials Reports**.

Report Settings - (New)

Criteria | Display | Appearance | Summary | Print Layout | Toolbar | Override | General

Find Denial Records ⓘ

Find Criteria

Open, completed, or any? ▼ ⓘ

Any

Billing indicators ⬆ ⓘ 🗑

	Billing Indicator
1	HM - Covid-19 Account [856]
2	<input type="text"/>

Criterion Logic **OR**

Claim diagnosis codes ⬆ ⓘ 🗑

	Diagnosis Code
1	2124
2	<input type="text"/>

Criterion Logic **OR**

Report Logic **AND** Show search summary

▶ Run 💾 Save 📄 Save As ⏪ Restore ✖ Close





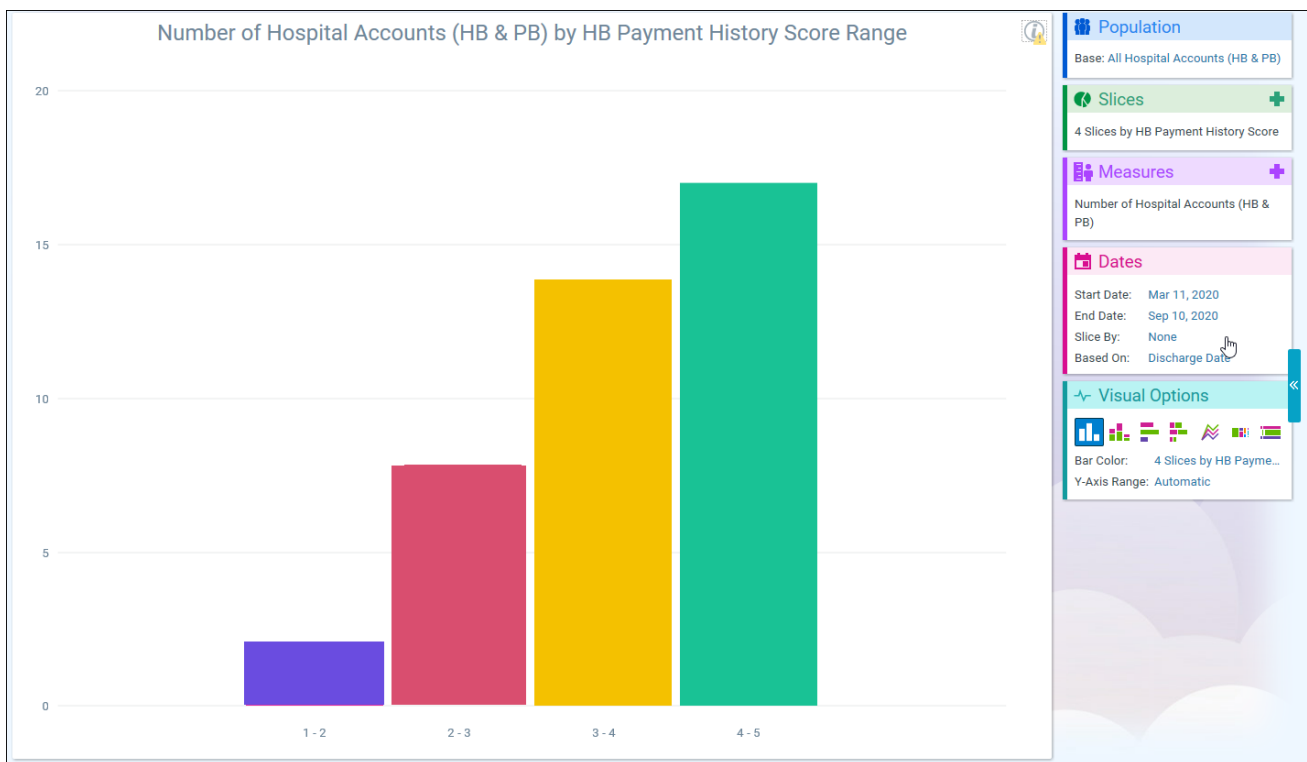
Evaluate Guarantors' Payment History

Key Benefits:

- Financial benefit

Description:

When you're reporting on transactions and hospital accounts in **SlicerDicer**, you can filter them by the payment history score of the associated guarantor.








Jump Between Linked-Up Workqueue Monitoring Dashboards and Components

Key Benefits:

- Time saver

Description:

No more rummaging through the **Analytics Catalog** when you need more information about something you spot in the **HB or PB Workqueues Needing Attention** dashboard components. They each now link directly to the **HB or PB Workqueue Monitoring Dashboard**.

Workqueues Needing Attention   

Report completed: Mon 8/24 02:26 PM

Includes HB workqueues with at least 1 item that has been on the workqueue's active tab for 14 days or more.

Owning Area	Qualifying Count	Qualifying Amount	Avg Days on Worst WQ	WQ Count
[No Value]	22,998	4,432,607,935,134	943	186
Hospital Coding	601	3,063,318	63	10
Hospital Billing	47	18,171	446	7
Customer Service	5	7,379	63	4
Billing	4	30,385	60	3
Clinical Documentation Improvement	203	1,100,797	70	2
Information Technology	1	25	44	1
Insurance Follow-up	8	34,011	57	1
test<script><script>{"n&test"< >hello	4	1,062	58	1

Includes workqueues from all service areas you have access to.

HB Workqueue Monitoring

Overview

HB Workqueue Monitoring Report Trending

Report completed: Mon 8/24 02:44 PM


Shows a trending graph of the number of results returned by the workqueue monitoring components over the past 30 days.

Run Date	Total Results
07/27/2020	188
08/11/2020	188
08/11/2020	208
08/24/2020	215
08/24/2020	215

Hospital Billing

HB Workqueue Status by Owning Area

Includes HB workqueues with at least 1 item.


 Run report

Report: HB WORKQUEUE STATUS BREAKDOWN

Charge Router

Charge Router Workqueue Status by Owning Area

Includes Charge Router workqueues with at least 1 item.

 Run report

Report: CHARGE ROUTER WORKQUEUE STATUS BREAKDOWN





HB Late Charges Cost Center Dashboard Now Groups by User

Key Benefits:

- More efficient
- Time saver

Description:

When you click a cost center link in the **HB Charge Timeliness Report**, the **HB Late Charges Cost Center child dashboard** appears. This dashboard now groups late charges by user as the default, which should allow you a clearer starting place for investigation. You can still switch to other groupers as needed.

← 170 - PHARMACY Charge Timeliness Details ▾

3,868
Total Charge Amount
100
Percent On-Time

170 - PHARMACY

Rank By: Late Charge Grouper:

HB Charge Timeliness - Last 4 Weeks by Total Charge Amount

Data collected: Wed 7/15 12:00 AM

Users	% On-Time	Avg Chg Lag	Late Chg Cnt	Tot Chg Cnt	Late Chg Amt	Tot Chg Amt	<7 Days Late	8 - 14 Days	15 - 30 Days	31+ Days
MCAHON, PADDY	100% <div style="width: 100%; height: 10px; background-color: #0070c0;"></div>	0.00	0	2	0	10	0	0	0	0
Totals	100% <div style="width: 100%; height: 10px; background-color: #0070c0;"></div>	0.00	0	19	0	3,868	0	0	0	0

Charges qualify as late if they are posted more than 3 days after the service date.





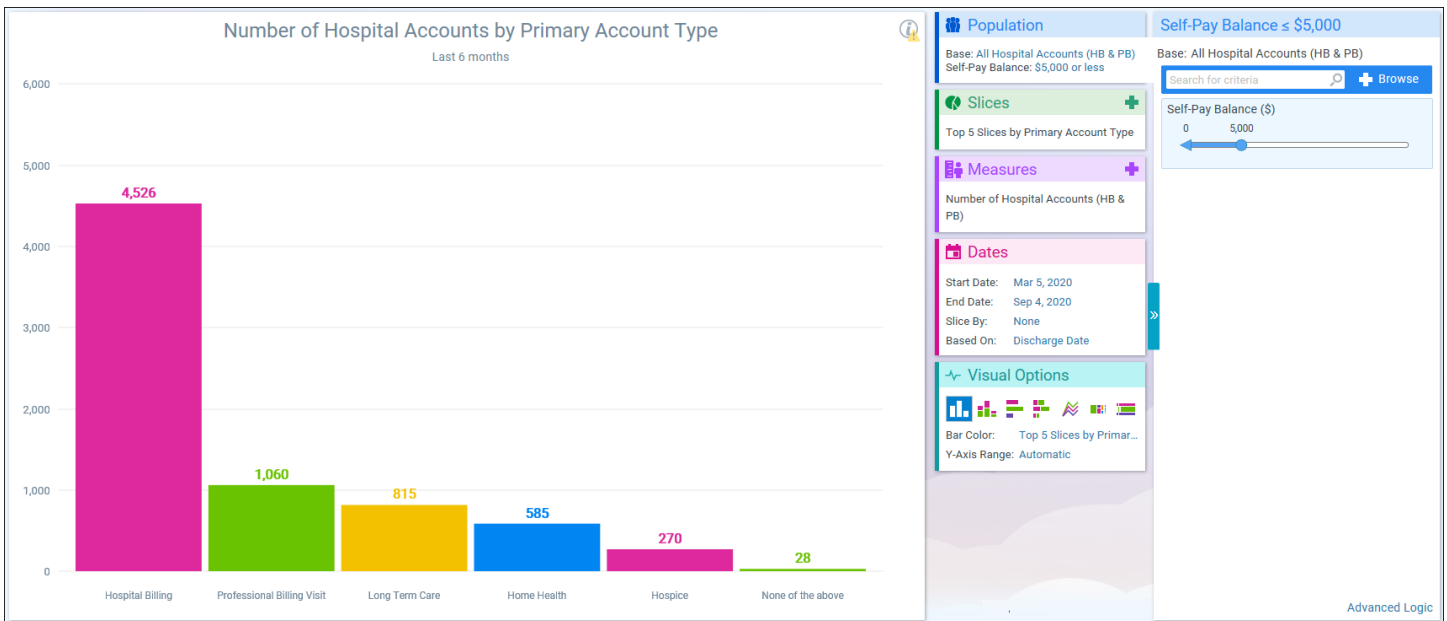
Explore Hospital Account Data Based on Account Type

Key Benefits:

- Financial benefit

Description:

You can now slice data based on hospital account type using the new **Primary Account Type**, **Related Account Type**, and **Account Types (All)** filters in the **Hospital Accounts (HB & PB) SlicerDicer** data model. For example, you might use the filters to compare self-pay balances on different primary account types.





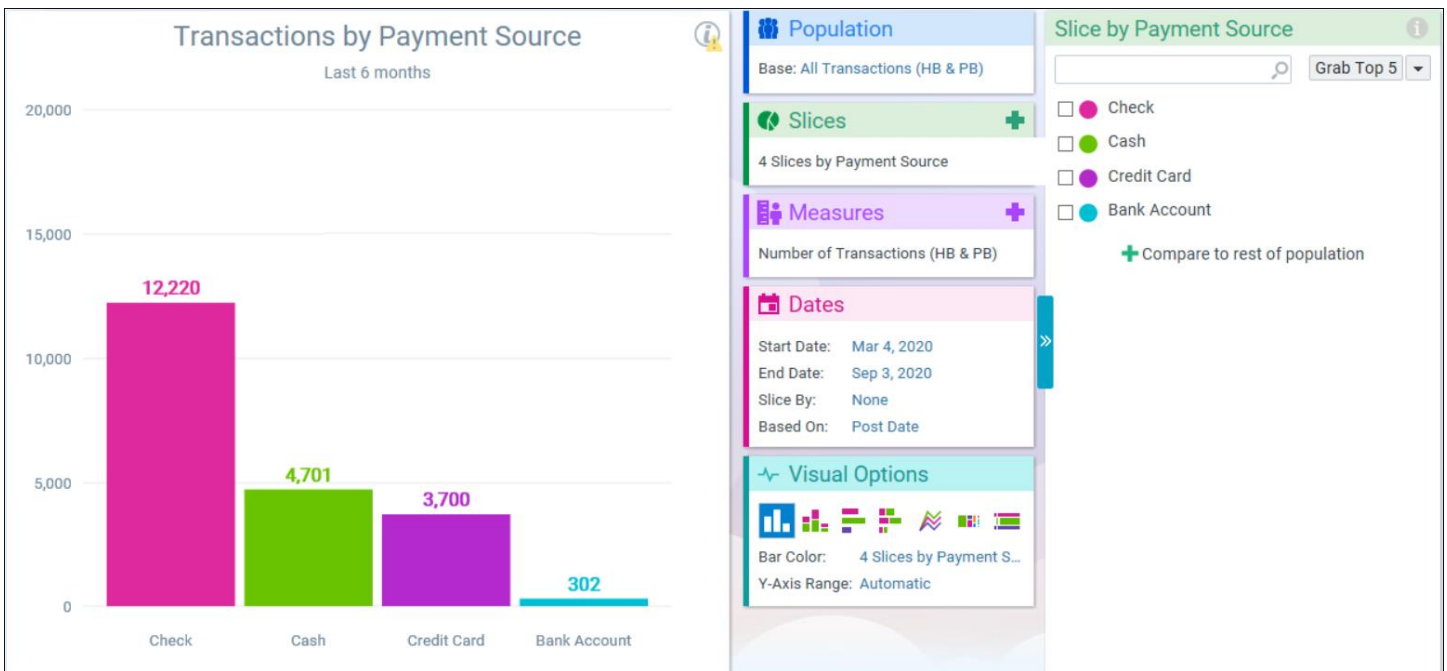
Delve Deeper into Transaction Data in SlicerDicer

Key Benefits:

- Financial benefit

Description:

You can now dive deeper into transaction data using new filters in the **Transactions data models** in **SlicerDicer**. For example, you can filter by payment source to review the most common ones.





More Automation Metrics Come to a Dashboard Near You

Key Benefits:

- Financial benefit
- More efficient
- More accurate and reliable

Description:

We've added automation metrics to components in several dashboards to help you determine the extent to which you're taking advantage of automated processes in Epic. For example, you can take a quick glance at the **HB** or **PB Revenue Integrity Dashboard** to see what percentage of charges at your organization have been triggered automatically through clinical or coding workflows.





Say Hello to the PB Follow-Up Workqueue Lag Summary Report

Key Benefits:

- Financial benefit

Description:

The **PB application reports** for user and payer lag have been combined into a single, easy-to-use **Reporting Workbench report**: the **PB Follow-Up Workqueue Lag Summary**. You can specify payer or user as the criteria when creating new reports from the template.

PB Follow-up Workqueue Payer Lag Summary										
Report Settings					Summary					
Payer response dates:	9/29/2020 to 10/5/2020				0 to 30 Days	31 to 60 Days	Over 60 Days	Total Activities	Average Lag (Days)	
Service areas:	Model system, WI HARBOR BLUFF HOSPITALS, WI Split Bluffs Organization				11	0	0	11	0.0	
Group by:	Workqueue, Lag Start Activity									
Additional Report Settings										
Activities that start payer lag:	Follow-up Activity - Created [1], Follow-up Activity - Appeal [5], Follow-up Activity - Resubmit Selected [6], Follow-up Activity - Resubmit Claim [14], Billing Action - Resubmit Charge [201], Billing Action - Resubmit Claim [203], Billing Action - Send Invoice Letter [209], Billing Action - Log Denial/Remark [85]									
WI Split Bluffs Organization Default Catch-All [6540] ▶										
Lag Start Activity	Activities 0 to 30 Days		Activities 31 to 60 Days		Activities Over 60 Days		Total Activities	Avg Lag (Days)		
	Count	% of Total	Count	% of Total	Count	% of Total				
Follow-up Activity - Created [1]	11	100.0%	0	0.0%	0	0.0%	11	0.0		
WI Split Bluffs Organization Default Catch-All [6540] Total	11	100.0%	0	0.0%	0	0.0%	11	0.0		
Grand Total	11	100.0%	0	0.0%	0	0.0%	11	0.0		



Account Maintenance



Paste Like a Pro in Hospital Account Lookup

Key Benefits:

- More efficient
- Time saver

Description:

With the new **Hospital Account Lookup activity** (search: Hospital Account), you can paste in a list of HARs from a spreadsheet, and **filter** the results by **date range**, **account status**, and **billing system**. You can **search**, **select**, and **open** as many HARs as you want at a time.

The screenshot shows the 'Hospital Account Lookup' interface. At the top, there are tabs for 'Account', 'Patient', 'Guarantor', 'Invoice #', and 'Tx Ref #'. A search bar contains the text 'taylor'. Below the search bar, there are filter options for 'Date Range' (3/25/2020 to 9/24/2020), 'Account Status' (Open, DNB, Billed, Closed, Combined, Voided), and 'Account Type' (HB, PB, Default). There are also buttons for 'Reset Filters' and 'Search Again'. Below the filters, there is a section for 'Selected Accounts (4)' and 'Recent' results. A table displays the search results for 'taylor', with columns for ID, Patient Name, Type, Guar Type, Location, Class, Status, Primary Payer, Adm Date, Dis Date, and Balance. The table shows 17 records, with 4 selected. The selected records are highlighted in blue. At the bottom right of the table, there are 'Accept' and 'Cancel' buttons.

ID	Patient Name	Type	Guar Type	Location	Class	Status	Primary Payer	Adm Date	Dis Date	Balance
4000001598	TAYLOR,APPLE	P/F	P/F	WI HARBOR BLUFF...	Inpatient	OPEN	Self-pay	06/25/2020		0.00
61402	TAYLOR,CHRIS	P/F	P/F	WI HOME HEALTH S...	HH Alternate...	DNB (DNB Error)	Self-pay	08/03/2020	08/31/2020	0.00
71829	TAYLOR,CHRIS	P/F	P/F	WI HOME HEALTH S...	HH Alternate...	OPEN	Self-pay	09/01/2020		0.00
100000510	TAYLOR,ELIJAH A	P/F	P/F	WI Delta Main Hospital	Outpatient	BILLED	HB MEDICARE	05/07/2020	05/07/2020	3,219.54
4000006726	TAYLOR,HEATH	P/F	P/F	WI Split Bluffs Hospital	Inpatient	BILLED	BLUE CROSS BLU...	07/21/2020	07/24/2020	2,245.67
4000006733	TAYLOR,HEATH	P/F	P/F	WI Split Bluffs Hospital	Outpatient	BILLED	BLUE CROSS BLU...	07/24/2020	07/24/2020	344.11
4000013443	TAYLOR,HEATH	P/F	P/F	WI Split Bluffs Hospital	Inpatient	DNB	BLUE CROSS BLU...	09/17/2020	09/17/2020	0.00
4000013465	TAYLOR,HEATH	P/F	P/F	WI Split Bluffs Hospital	Inpatient	BILLED	BLUE CROSS BLU...	09/17/2020	09/17/2020	39,787.40
47238	TAYLOR,LIME	P/F	P/F	ESC SA Melbourne	Inpatient	OPEN	Self-pay	07/02/2020		0.00
49836	BAUMAN,TAYLOR	P/F	P/F	TBAUMAN SERVICE...	Inpatient	OPEN	Self-pay	07/07/2020		0.00





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. Below the navigation bar, the patient name 'Smith, Jenny' is displayed. The admission information is as follows:

Adm Date:	11/8/2013	Adm Time:	11:43 PM
IP Adm Date:	11/8/2013	IP Adm Time:	11:43 PM

An 'Auth/Cert ID' input field is visible on the right side of the window.



Guarantor 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 shows the 'Prof Tx Inquiry' interface. At the top, there are navigation tabs: Guar Summary, Guar Acct Note, Prof Tx Inquiry (selected), Patient Summary, Coverages, Guar Account Edit, Statement History, Correspondence List, and CRM List. Below the tabs, there are action 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 is currently empty. To the right of the filters is a 'Clear All' button and a 'Filters Applied' button. Below the filters, there is a summary for 'Undistributed: (Count: 1; Amount: -1,194.20)'. A 'Visit Accounts' section is visible, showing a visit on 10/8/2015 for 'Texans Sboirthree' at 'McLendon, Terry Bowman, MD in INT...'. A table of transactions is displayed below, with columns for Tx#, Description, Modifiers, Status, CSN, Service, and Amount. The table contains three rows of transaction data. A 'Filters Applied' popup is overlaid on the right side of the screen, showing the applied filters: 'Billing Provider: MCLENDON, TERRY BO...' and 'Service Date: 10/8/2015'. The popup has a close button (x) next to each filter. The interface also shows a 'Coverages' button at the bottom right.



Payments and Transactions



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.

Transfer Transaction #4

Transfer Adjustment 31.00

Select Guarantor

Suggested Guarantors Any Guarantor ⓘ

	Insurance	Self-Pay	Total
<input type="radio"/> MILSON,IMOGEN - 4455 Dental	0.00	24.00	24.00
<input type="radio"/> MILSON,IMOGEN - 112372 Personal/Family	6,190.37	1,696.79	7,695.91

Transfer Options

Open guarantor account after transfer

Comment





Easily Create Payment Plans from Enterprise Guarantor Summary

Key Benefits:

- More efficient
- Less clicks

Description:

The updated **Payment Plans activity** makes it easier to create plans, define terms, and see when you need to take action.

Quickly create a payment plan with all the guarantor's self-pay balances with guarantor activities from **Enterprise Guarantor Summary** or use account activities to select individual HARs for a payment plan.

Create Payment Plan

New Plan _____

Balances

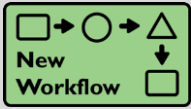
Self-pay accounts not on plan	2,245.67
New Plan Balance	2,245.67

Terms

Monthly Amount	Number of Payments
93.57	24
<i>Minimum: 0.01</i>	<i>Maximum: 2400</i>
Statement Day Of Month	Final Payment
29	August 2022

Add Auto Pay





Distribute Action Replaced by Transfer to Multiple in Transfer Transaction

Key Benefits:

- Improved workflow
- More efficient
- Time saver

Description:

The **Distribute** action for **self-pay payments** has been replaced by a multiple-destination option. You can select multiple accounts for distribution of a self-pay payment and add the target accounts to the **Account List** for further review while you're at it.

Transfer Transaction #798130

Transfer Payment 35.00 of 35.00

Send To: HB PB

Transfer Amount:

Select Hospital Accounts Remaining Amount 35.00

ⓘ

Hospital Account	Bucket	Balance	Transfer Amount
47827 - GOMEZ,VALERIA	Self-Pay	28.00	ⓘ
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Transfer Options

Add hospital accounts to account list

Comment





Edit Auto-Pay Payment Methods in Guarantor Snapshot

Key Benefits:

- Time saver

Description:

Click the **Change Auto Pay Method** button and then the **pencil** to edit auto-pay payment.

The screenshot shows the 'Guarantor Snapshot' interface for 'ALEE, GENIE'. A red circle highlights the 'Change Auto Pay Method' button in the 'Payment Plan (Auto Pay)' section. A red arrow points from this button to the 'Electronic Payment' dialog box. The dialog box has two sections: 'Use a Saved Payment Method' and 'Use a New Payment Method'. The 'Use a New Payment Method' section has tabs for 'Credit Card' and 'Bank Account', with 'Credit Card' selected. Below the tabs are buttons for 'Swipe and Save' and 'Manual'. A 'Go Back' button is at the bottom right of the dialog box. The background shows a table with payment plan details.

Payment Plan (Auto Pay)	
✓ VISA	Visa x1111 (Visa) (exp. 01/2024)
On	Total due 20.00
Time	Monthly amount 20.00
	Start date 6/23/2020
	Next payment due 10/23/2020
	Next auto pay date 10/23/2020
	Next auto pay amount 20.00





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**

Pending Adjustments/Refunds

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

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

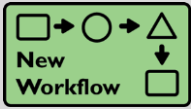
Adjustments

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





Distribute Action Replaced by Transfer to Multiple in Transfer Transactions

Key Benefits:

- Improved workflow
- More efficient
- Time saver

Description:

The **Distribute** action for **self-pay payments** has been replaced by a multiple-destination option. You can select multiple accounts for distribution of a self-pay payment and add the target accounts to the **Account List** for further review.

Transfer Transaction #798130

Transfer Payment 35.00 of 35.00

Send To: HB PB

Transfer Amount:

Select Hospital Accounts Remaining Amount 35.00

ⓘ

Hospital Account	Bucket	Balance	Transfer Amount
47827 - GOMEZ,VALERIA	Self-Pay	28.00	ⓘ
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Transfer Options

Add hospital accounts to account list

Comment





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' interface in Epic. At the top, there are tabs for 'Patient Responsibility' and 'Other', and a link for 'Advanced Filters'. 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' accounts. The menu has a dropdown arrow and a checked box next to 'Outstanding'. Below this, there are two options: 'On Payment Plan' and 'Not on Statement', both with checked boxes. At the bottom of the modal are 'Apply' and 'Cancel' buttons. The names 'Isabella Molina' are visible to the right of the table rows.

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





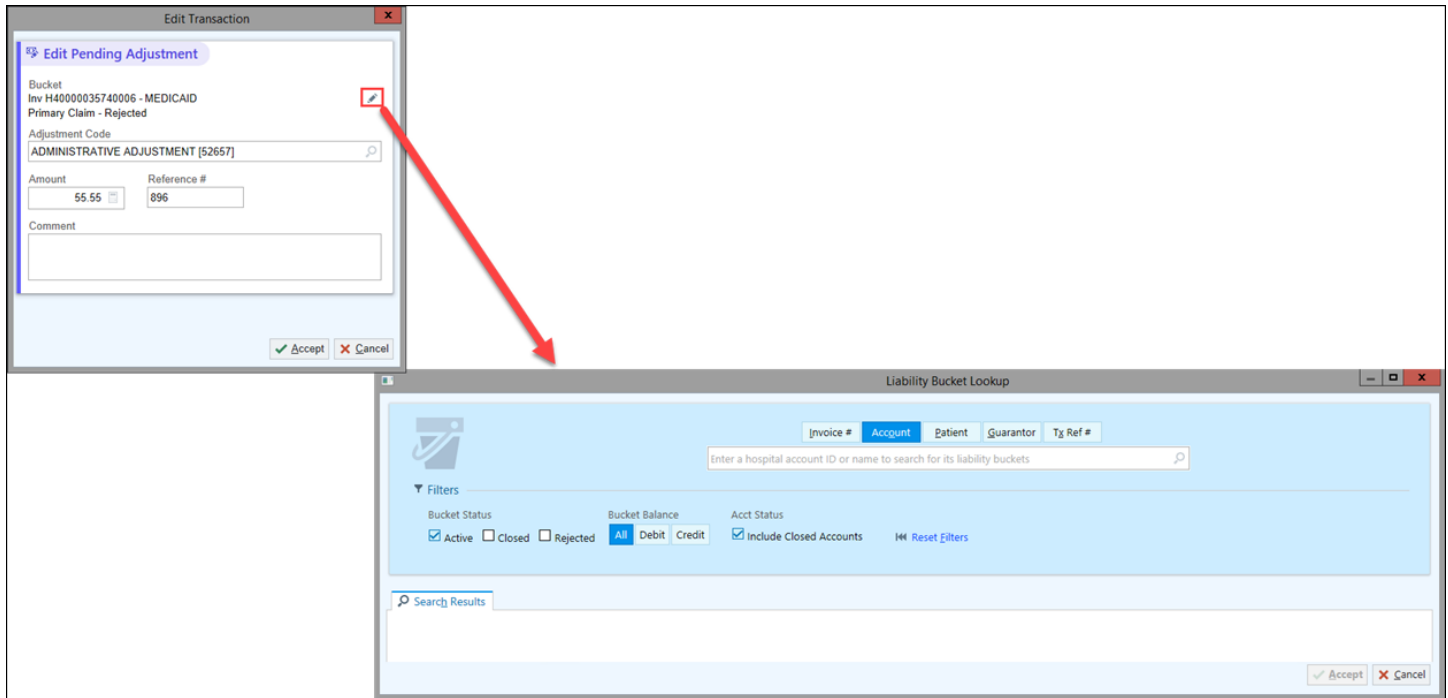
Get More Precise with Your Adjustment Edits in Liability Bucket Lookup

Key Benefits:

- More accurate and reliable
- Financial benefit

Description:

When editing adjustments in adjustment/refund review workqueues or in transaction inquiry, you can now click the **pencil icon** to launch **Liability Bucket Lookup**, where you can use filters and searches to find the correct destination bucket.





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 ⓘ

Collecting 500.00

Distribute Manual ✎

Include: Patient Responsibility All Balances Other ▾ Advanced Filters

⚠ **Remaining to Distribute** 500.00 **Collecting** 500.00





Process Self-Service Estimates with Only Service-Level Benefits

Key Benefits:

- Financial benefit
- More efficient
- More accurate and reliable

Description:

Patients who create self-service estimates can now do so with coverages that include only service-level benefits. These are the benefit options listed in the **Specific Benefits** section during estimate creation. As you process self-service estimates, expect to see some that have only service-level benefits.

Estimate for Upper Endoscopy

Coverage Information
Hylian Insurance Category

Please enter your benefits. These may be found on your member card or other material provided by your insurance provider. If you can't find this information, you can contact your insurance provider or call our customer service department at 608-271-9000.

Specific Benefits

This estimate involves the following service types, which might have different benefits under your insurance coverage. Check to see if you have benefits specific to any of these service types.

	Copay (\$)	Remaining Deductible (\$)	Coinsurance (%)	Maximum Out-of-Pocket (\$)
Diagnostic	<input type="text" value="50.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>





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**.

The screenshot shows the Epic Refund form interface. At the top right, a blue pill-shaped badge displays a dollar sign icon, the amount '17.50', and 'of 30.00'. The form fields include: 'Refund Code' with a search icon and the value 'REFUND [1018]'; 'Amount' with three tabs: 'Undistributed' (selected), 'Total', and 'Advanced', and a text input field containing '17.50'; 'Send To' with three tabs: 'Guarantor (Default)' (selected), 'Patient', and 'Other', followed by the address 'CRICHTON, JOHN, 123 N Moya Rd, Suite 5, PORT ORANGE Florida 32123'; 'Reasons' with a search icon and the value 'Overpayment'; and a 'Comment' text area. Below the form, there is an 'Additional Information' section with a dropdown arrow, a 'Print Refund Slip' link, and two buttons: 'Print Now' (with a printer icon) and 'Don't Print' (with a red X icon). A message at the bottom states 'No refund slip will be printed.'



Cash Management



New Reports on Cash Records and Control Groups

Key Benefits:

- More accurate and reliable
- Financial benefit

Description:

Use new reports to easily track outstanding cash records and cash control groups. Click **Edit Cash** or double-click on the rows to open the cash records.

Cash Management Summary [31763] as of Thu 9/24/2020 7:22 AM

Filters Options **Edit Cash**

Specialized View **Detail**

Ref Number	Routing Number	Routing Code	Deposit Date	Service Area	Source	Status	Payer/Guarantor	Total Amt	External Amt	Posted Amt	Pending Amt	Outstanding Amt	DPR ID	CSH ID
547	120246PROF...	PROFESSION/	09/02/2020	WI Split Bluffs Organi...	Cash	Confirmed	Medicare	10.00	0.00	0.00	10.00	0.00	859	1420
614	120246PROF...	PROFESSION/	09/02/2020	WI Split Bluffs Organi...	Credit Card	Fully Posted	Commercial Payer	11.00	0.00	11.00	0.00	0.00	863	1422
615	120246PROF...	PROFESSION/	09/02/2020	WI Split Bluffs Organi...	EOB	Fully Posted	Commercial Payer	11.00	0.00	11.00	0.00	0.00	863	1423
752	120246PROF...	PROFESSION/	09/02/2020	WI Split Bluffs Organi...	Cash	Fully Posted	Medicaid	11.00	0.00	11.00	0.00	0.00	864	1424
1001	120246PROF...	PROFESSION/	09/02/2020	WI Split Bluffs Organi...	Check	Fully Posted	Medicare	110.00	0.00	110.00	0.00	0.00	863	1425
1033			09/02/2020	WI Split Bluffs Organi...	Check	Voided	Commercial Payer	1.00	1.00	0.00	0.00	0.00		1476
1105	120246PROF...	PROFESSION/	09/02/2020	WI Split Bluffs Organi...	Check	Created	Commercial Payer		0.00	0.00	0.00	0.00	867	1477
1211	120246PROF...	PROFESSION/	09/02/2020	WI Split Bluffs Organi...	Check	Created	Commercial Payer		0.00	0.00	0.00	0.00	867	1478
1314	120246PROF...	PROFESSION/	09/02/2020	WI Split Bluffs Organi...	Check	Created	Medicare		0.00	0.00	0.00	0.00	867	1479
1494	120246PROF...	PROFESSION/	09/02/2020	WI Split Bluffs Organi...	Check	Created	Medicaid		0.00	0.00	0.00	0.00	867	1480

Cash Summary

Cash Summary

Payer: COMMERCIAL PAYOR
 Routing #: 120246PROFESSIONAL042
 Comment: —

Service Area: WI Split Bluffs Organization
 Routing Code: Professional Payments Automatic

Department: INTERNAL MED
 Reference Date: 09/21/2020

Credit Card #614 | Created

Reference #: 614
 Deposit Date: 09/21/2020

Balances

Posted: 11.00
 Pending: 0.00
 External: 0.00
 Outstanding: 0.00

Cash Amount: **11.00**

Payment Posting Activity

There are no posted payments associated with this cash record.

History

Time	Summary	User
September 21		





Transfer Cash Records with One Action

Key Benefits:

- Time saver

Description:

To transfer cash records from the **Edit Cash Control Group** screen, click **Transfer**. You no longer need to disassociate records before you associate them with another group.

Editing Cash Control Group - 1423

Group Summary

Status: Pending
Department: EPIC MEDICAL DEPT.
Routing Code: Professional Payments Automatic
Routing Number: 20200923PROFESSIONAL1722
Deposit Date: 09/23/2020
Comment: This is a cash control group comment used as an example. Control group created by Epic, User with a control amount of \$350.00

Amounts

- Control: \$350.00
- Entered: \$350.00
- Remaining: \$0.00

Cash List

Errors?	Source	Ref #	Ref Date	Payer/Guarantor	Provider ID	Cash Amount	External	Pending	Comment	Cash ID
	Check	T3993KID8I9	09/23/2020	EPIC HEALTH		75.00	0.00	0.00	This is a cash record...	7953
	Check	B37838W9EP	09/23/2020	EPIC HEALTH		120.00	0.00	0.00		7954
	Check	N873839Z9A	09/23/2020	EPIC HEALTH		55.00	0.00	0.00		7955
	Check	V56302594ER	09/23/2020	EPIC HEALTH		62.00	0.00	0.00		7956
	Check	A9484ROC8Q	09/23/2020	EPIC HEALTH		38.00	0.00	0.00		7957

Cash Edit

Source: Check

Transfer Cash

Select cash control group to transfer to:
1295 [20200818PROFESSIONAL1455]

Comment:
Sample comment - Transferring a cash record from control group 1423 to control group 1295.

Transfer Don't Transfer

Cash Amount: 75.00

Group is ready to be confirmed

ACCEPT AND CONFIRM ACCEPT CANCEL





View Cash Lists and Control Groups in Cash Management

Key Benefits:

- Improved workflow

Description:

To see a list of all the cash records in a control group in the main grid of the **Cash Management** activity, click the **control group** and then click **View Cash**. To see a filterable list of all the cash records regardless of control group, click **Cash** in the top right of the main grid.

Errors?	ID	Routing #	Status	Deposit Date	Control Amt	Total Amt	User	Comment	Ext Amt
✓	1784	20201001PROFESSIONAL2125	Confirmed	10/01/2020	13.00	13.00	STRICKLAND, AMAN...	Imported on 10/1/2020 8:11 AM	0.00
	1783	20201001PROFESSIONAL2124	Confirmed	10/01/2020	13.00	13.00	STRICKLAND, AMAN...	Imported on 10/1/2020 8:11 AM	0.00



General Updates



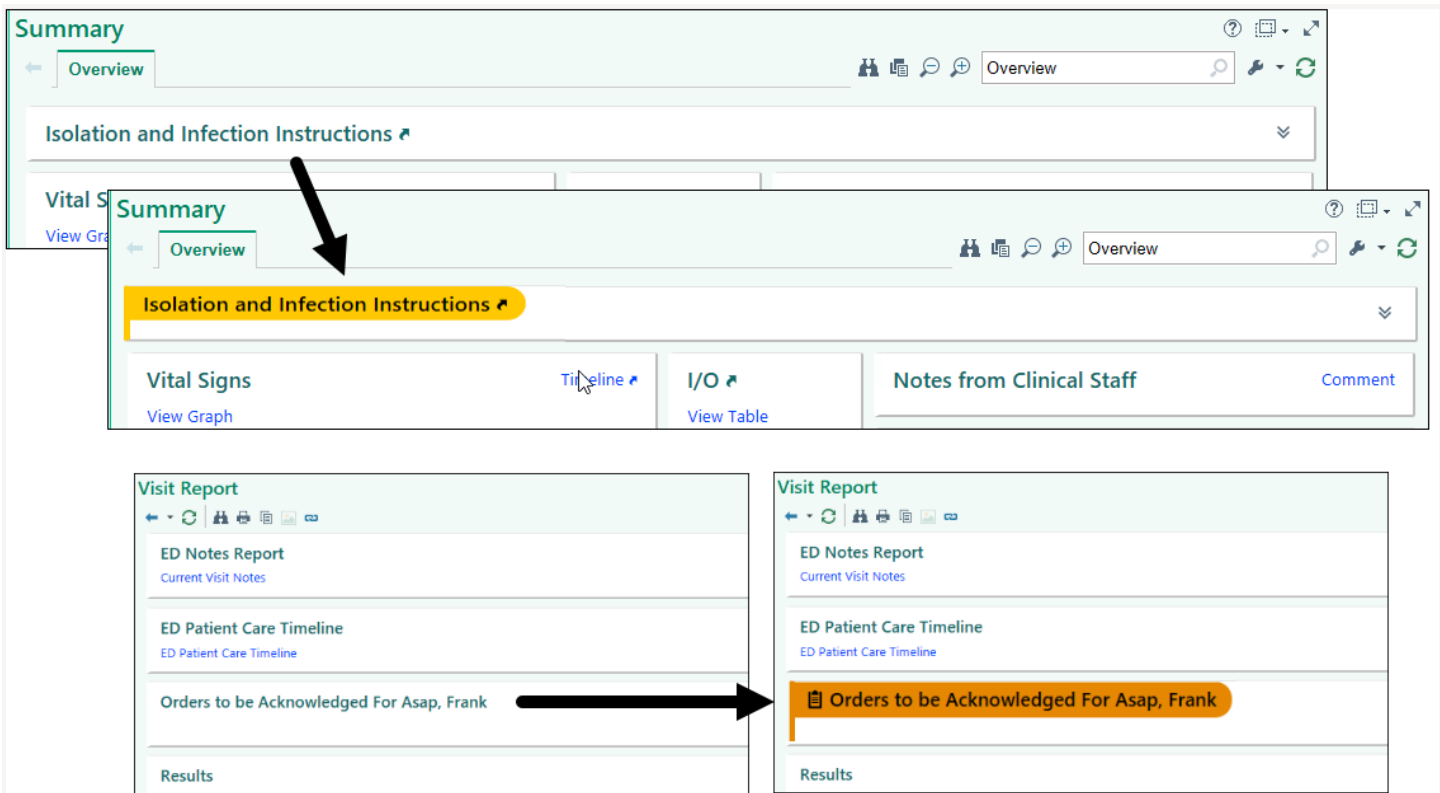
Colored Headers for Important Information More Consistently Appear for Users with Fewer Colors Setting

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.



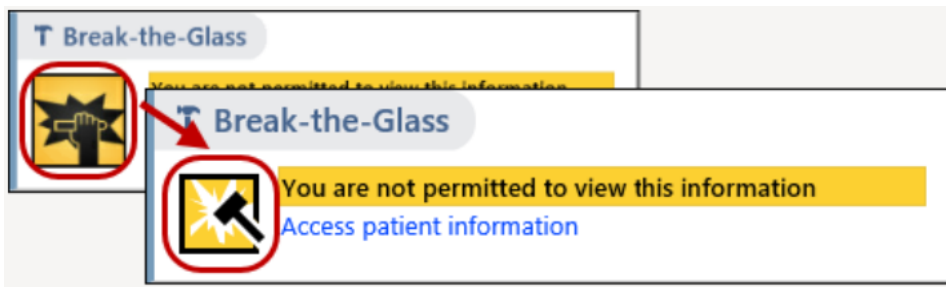
New Break-the-Glass Icon in Reports

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.



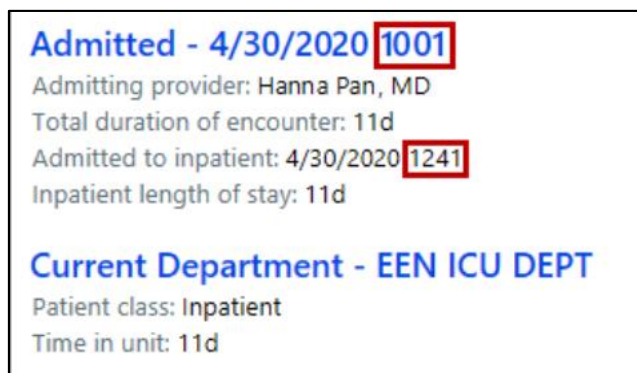
See a Patient's Admission Time in Storyboard

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 Hyperspace, 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.

The screenshot shows the 'User SmartList - sgnMyProc [12833]' interface. It features a table with columns for 'Choice' and 'Default?'. The 'Choice' column contains entries like '{:PHR,ENDOSCOPY}', '{:PHR,COLONSCOPY}', and '.erc'. A star icon is visible next to the '.erc' entry. To the right, there is a 'Settings' panel with fields for 'Name' (sgnMyProc) and 'Display Name'. Below the table, a dropdown menu is open, showing a list of SmartPhrases with columns for 'Name' and 'Description'. The first item is '☆ ERCD' with the description 'ERCD on @TODAYDATE@'. Other items include '☆ ERCIMGFINDINGS' and '☆ ERCIMGPROC'.

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.



Single Billing Office Leadership Feb. 21 Epic Update Companion



MyChart's New Home Page

Key Benefits:

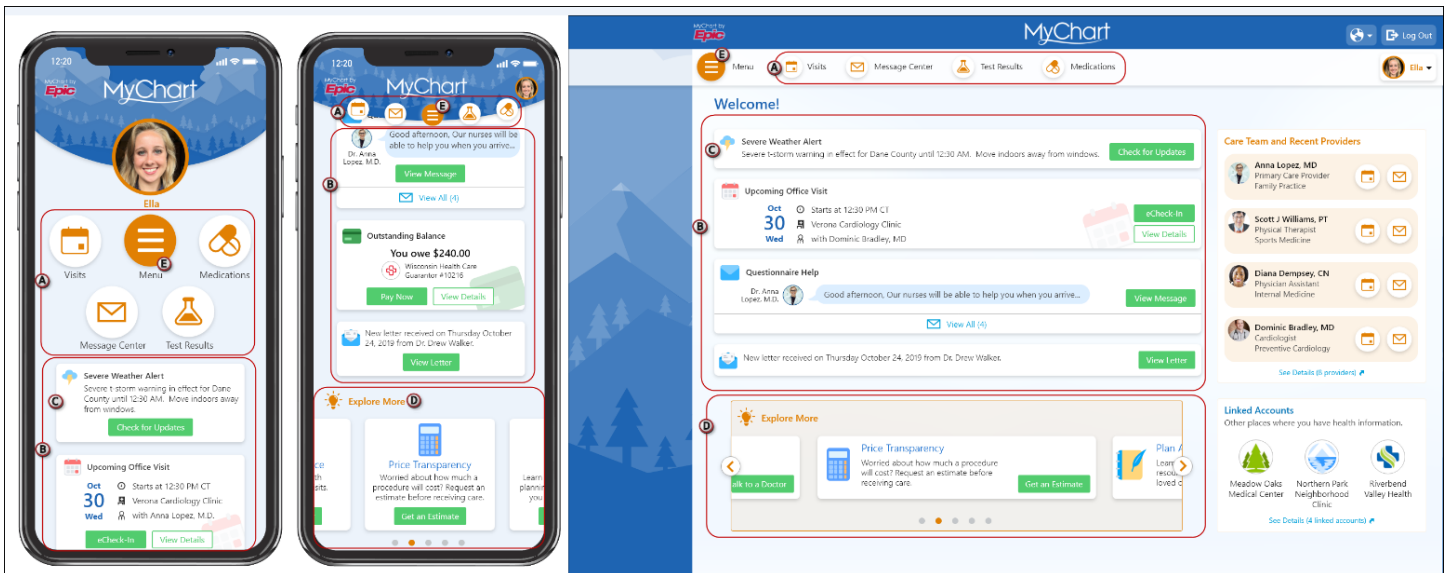
- Improved workflow
- More efficient

 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.

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.

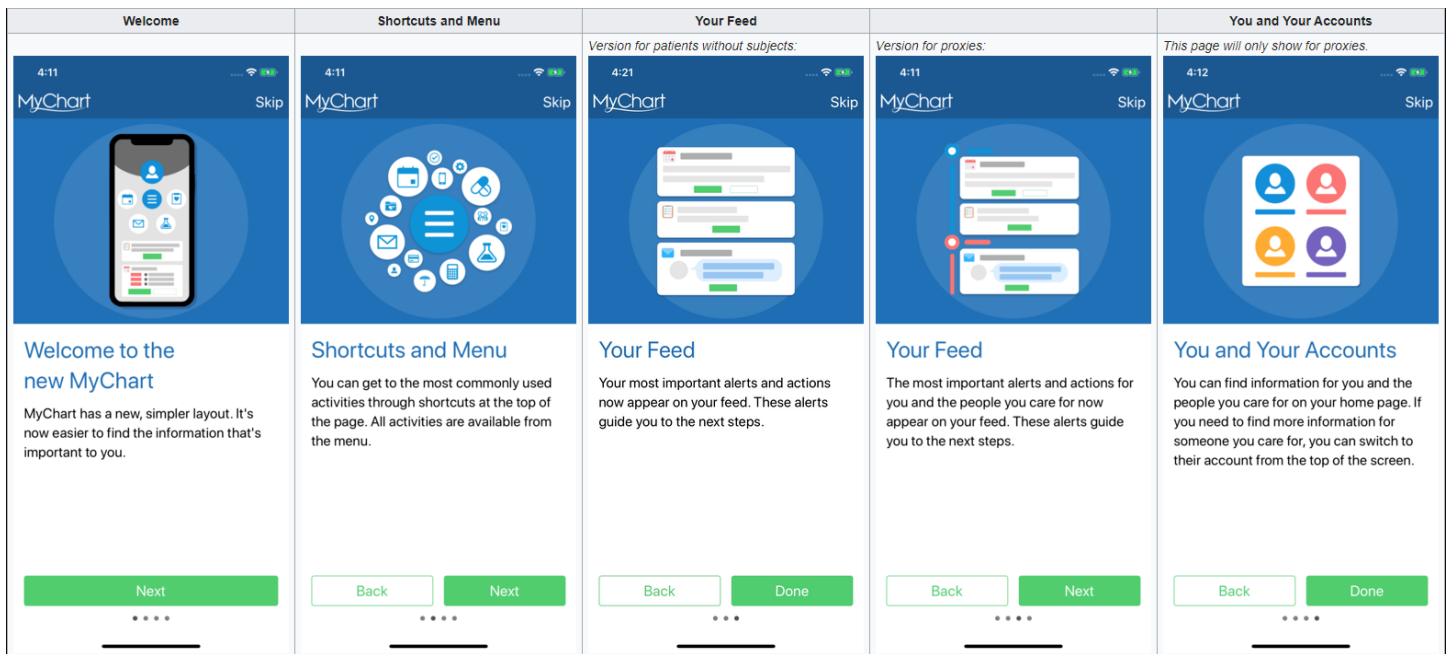


- Shortcuts on the homepage provide easy access to the four activities a patient uses the most.
- The **health feed** is a consolidated view of actionable health updates, including appointment reminders, check-in tasks and messages from the patient's care team.
- Information for proxies and patients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

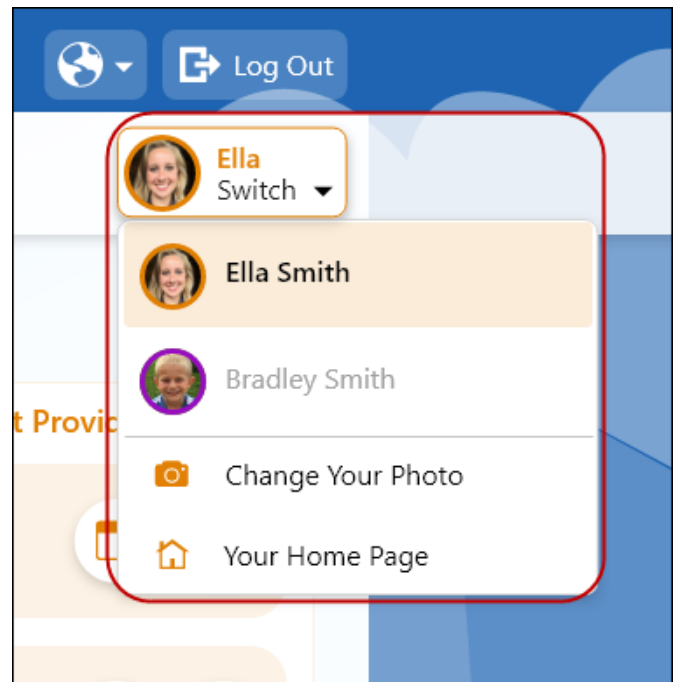


Single Billing Office Leadership Feb. 21 Epic Update Companion

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 Home 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**.



