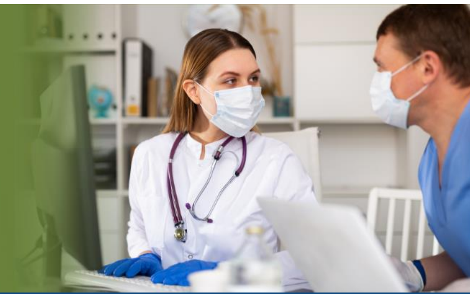
Feb. 21 Epic
Update Companion



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

New Feature

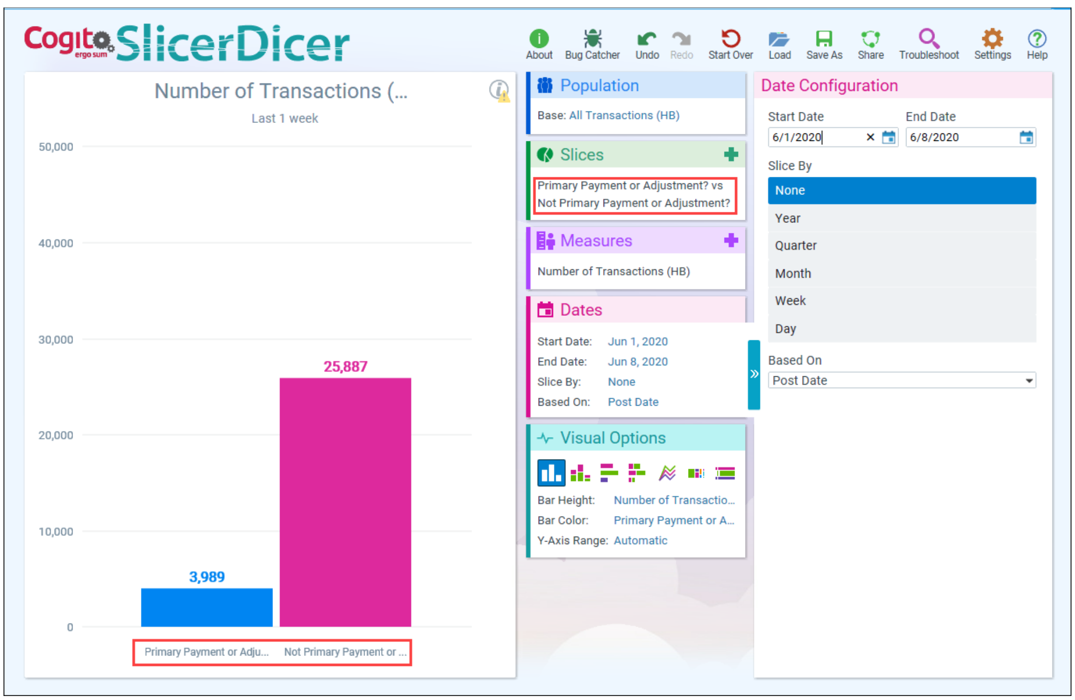
Sort by Primary Payer in Transactions Data Models

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.



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New Look

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	
Date range by post date:	5/30/2020 - 6/4/2020
Grouped by:	Primary Financial Class, User
Service areas:	All

Summary			
Charges	Quantity	Amount	Late Charges
-14,257	**-14,489**	**87,496.46**	**0**

Additional Report Settings	
Financial classes:	Commercial, Medicare, Medicaid, Self-Pay

Commercial

User	Charges	Quantity	Amount	Late Charges
HB, BACKGROUND [HBBCKGRND]	-627	-627	4,807.35	0
Commercial Total	**-627**	**-627**	**4,807.35**	**0**

Medicaid

User	Charges	Quantity	Amount	Late Charges
HB, BACKGROUND [HBBCKGRND]	-86	-86	1,294.91	0
TANG, TED [8836]	66	66	11,550.00	0
Medicaid Total	**-20**	**-20**	**12,844.91**	**0**

New Feature

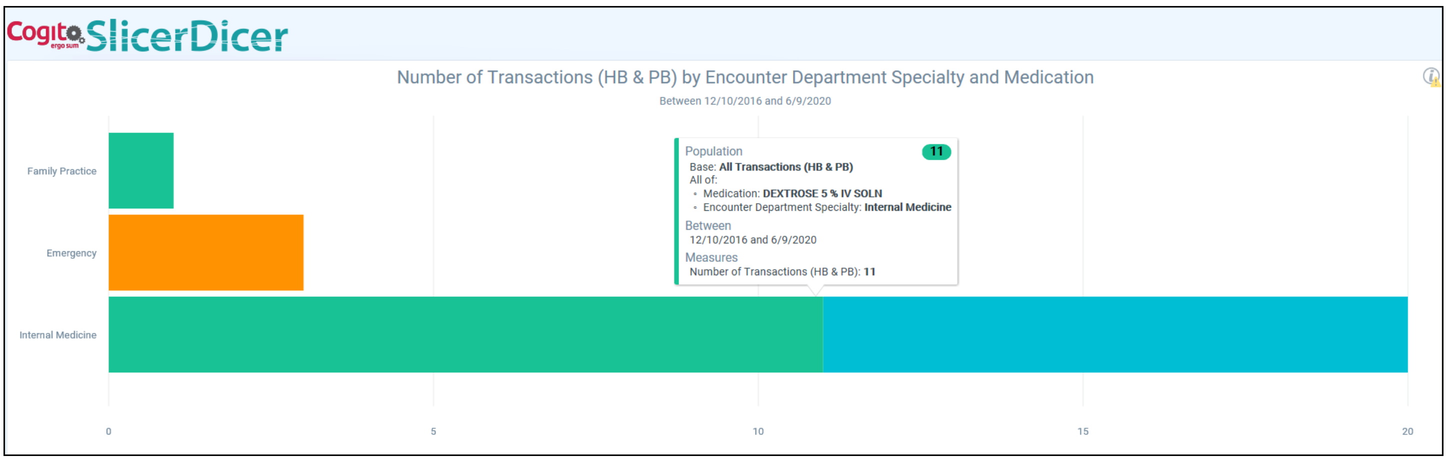
Sort Billing Data by Charge Source, Encounter Department, and More

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.



Key Change

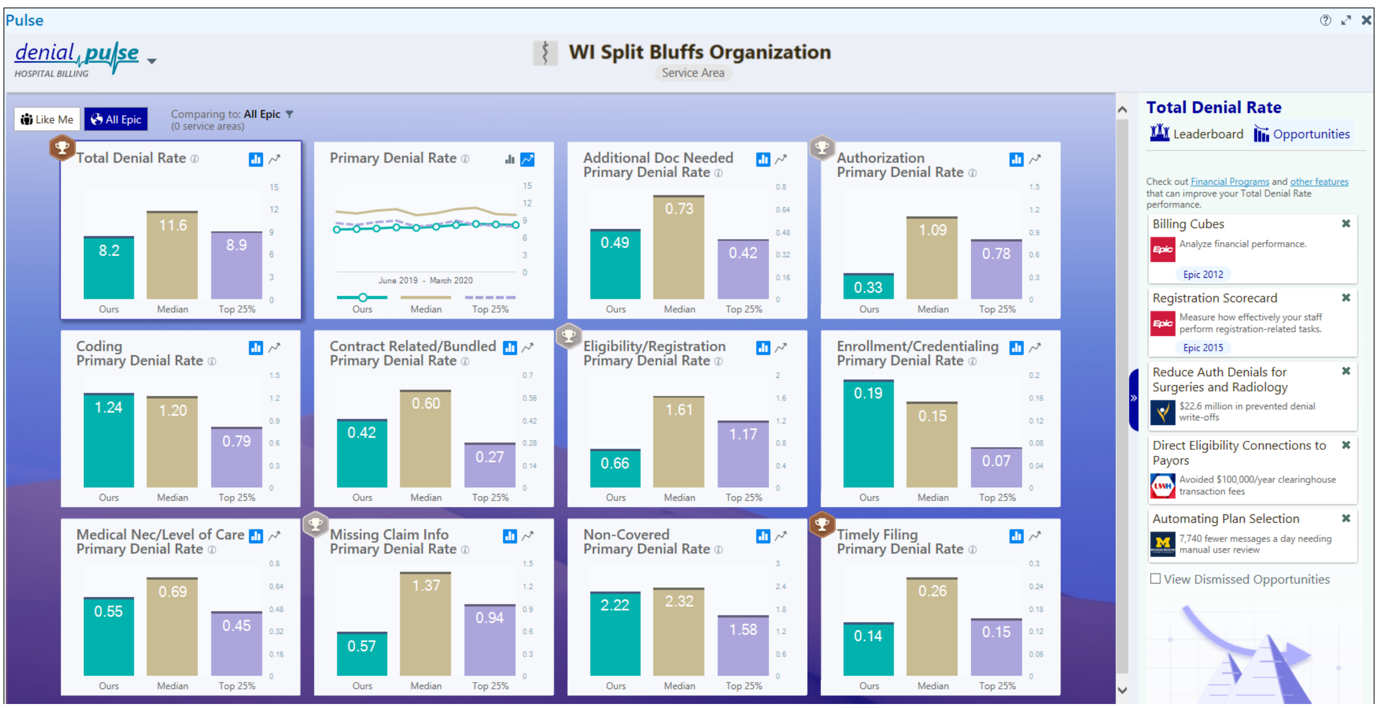
See How Your Denial Rates Measure Up

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.



New Feature

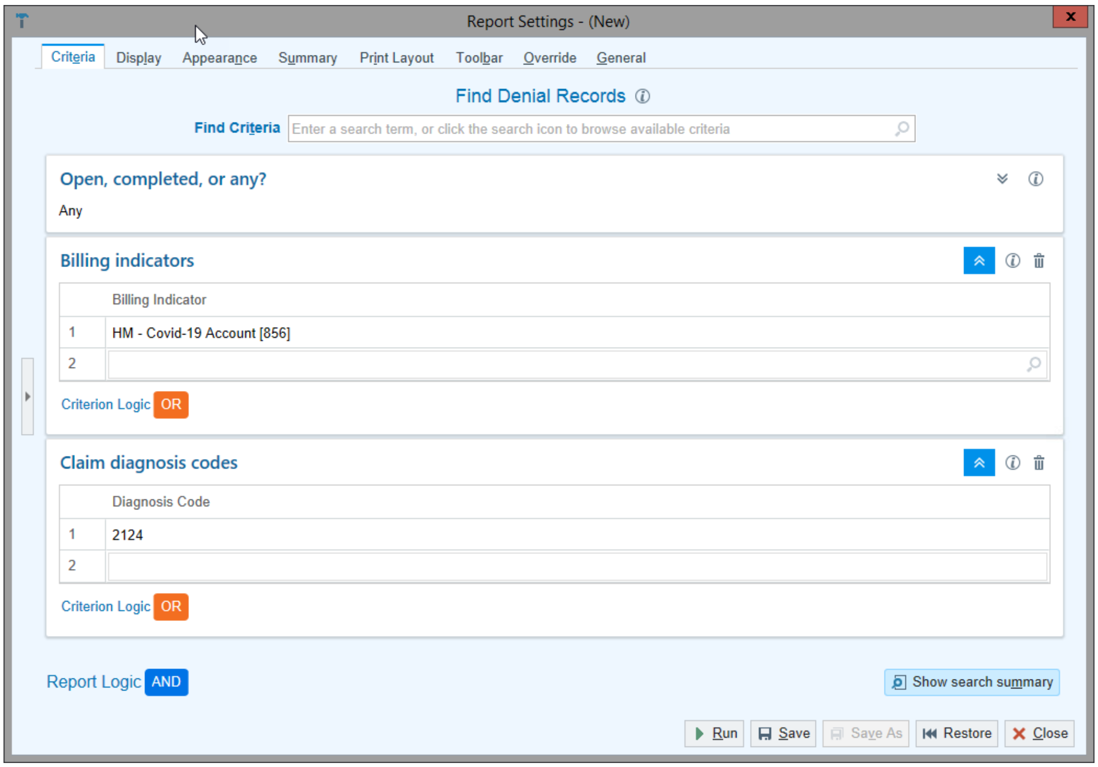
Report on COVID-19 Information in Denials Reports

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.**



New Feature

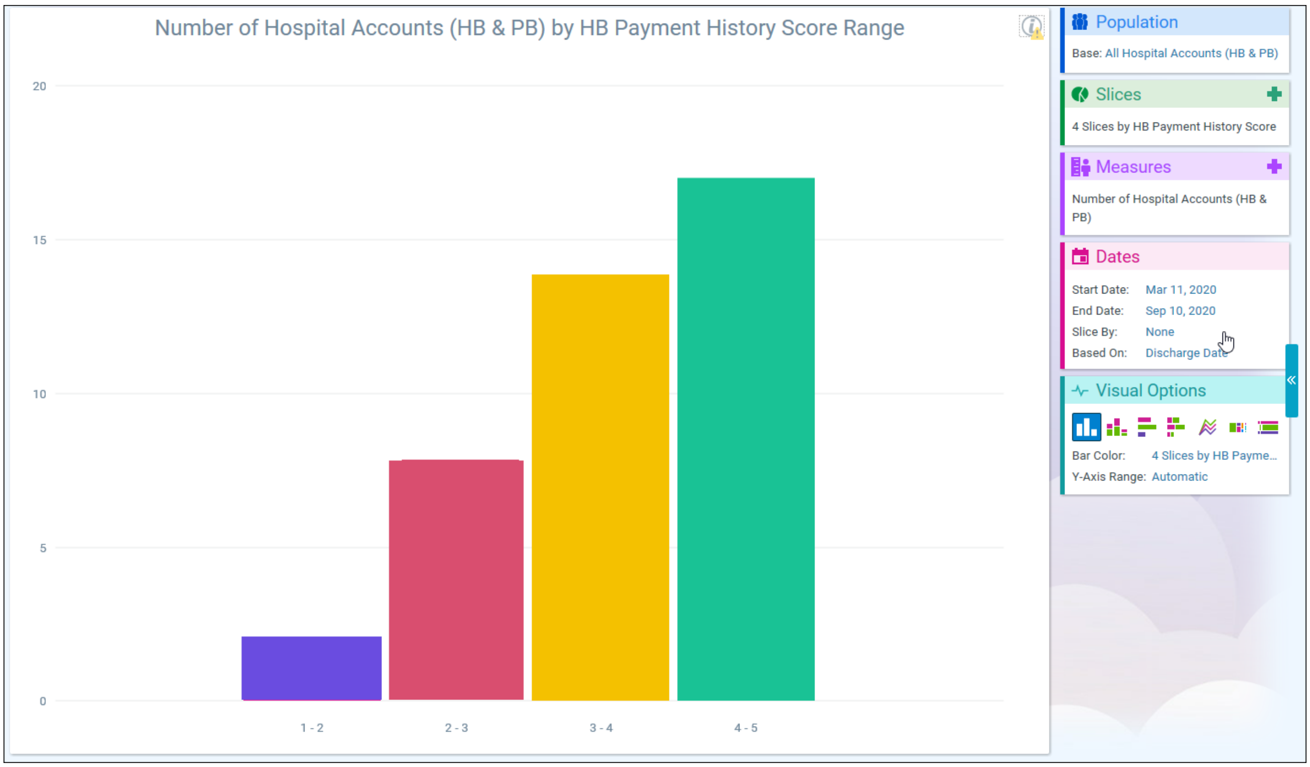
Evaluate Guarantors' Payment History

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.



Time Saver

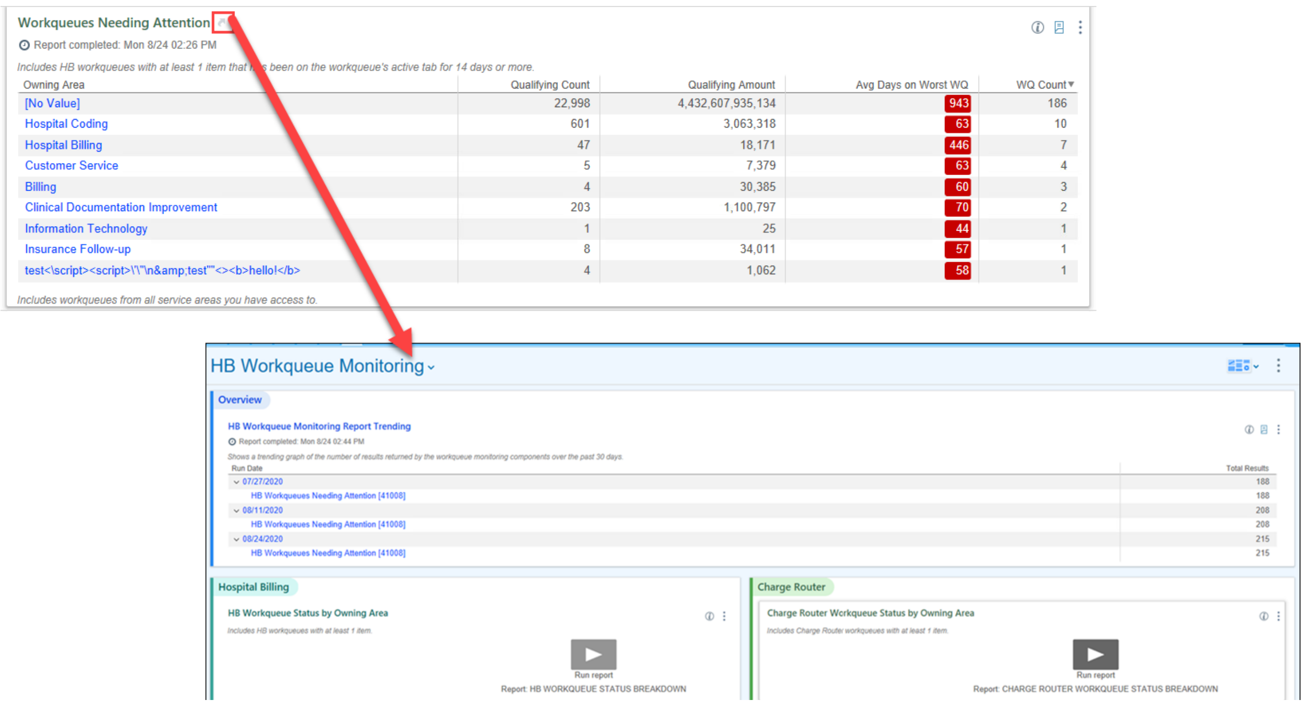
Jump Between Linked-Up Workqueue Monitoring Dashboards and Components

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.**



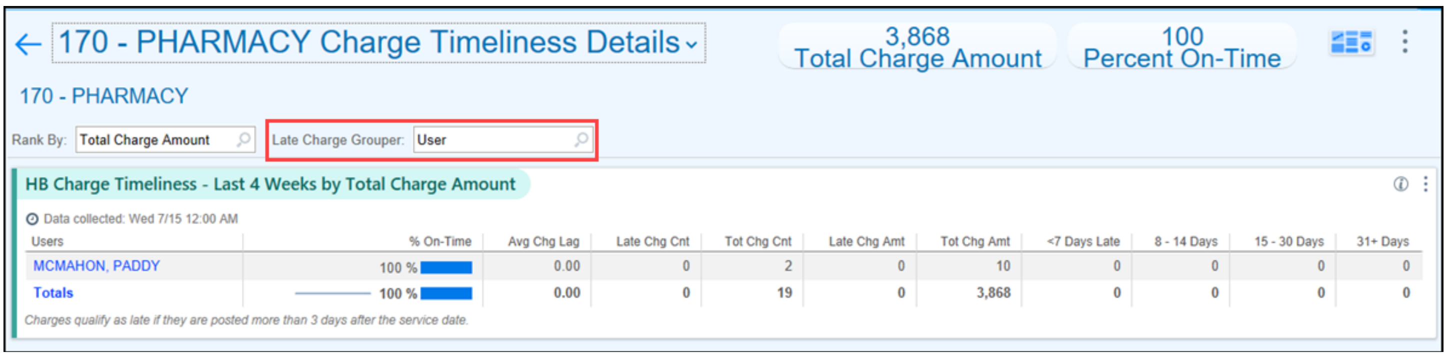
HB Late Charges Cost Center Dashboard Now Groups by User

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.



New Feature

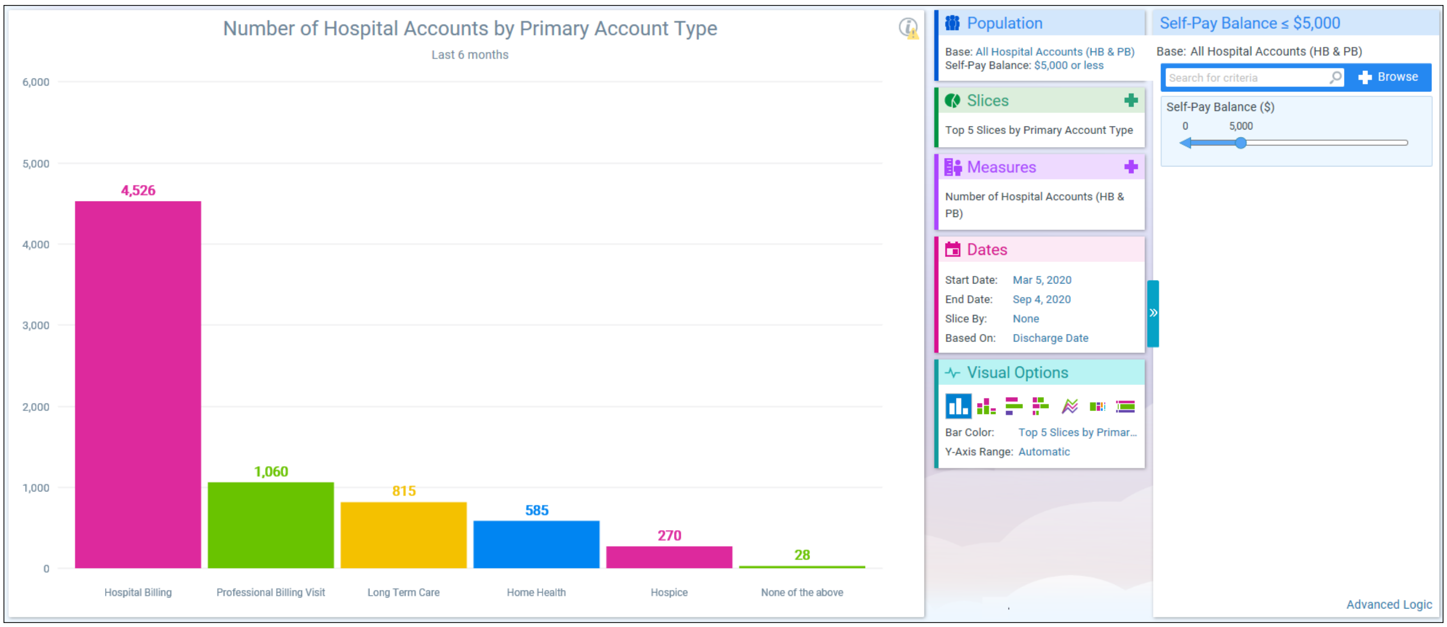
Explore Hospital Account Data Based on Account Type

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.



New Feature

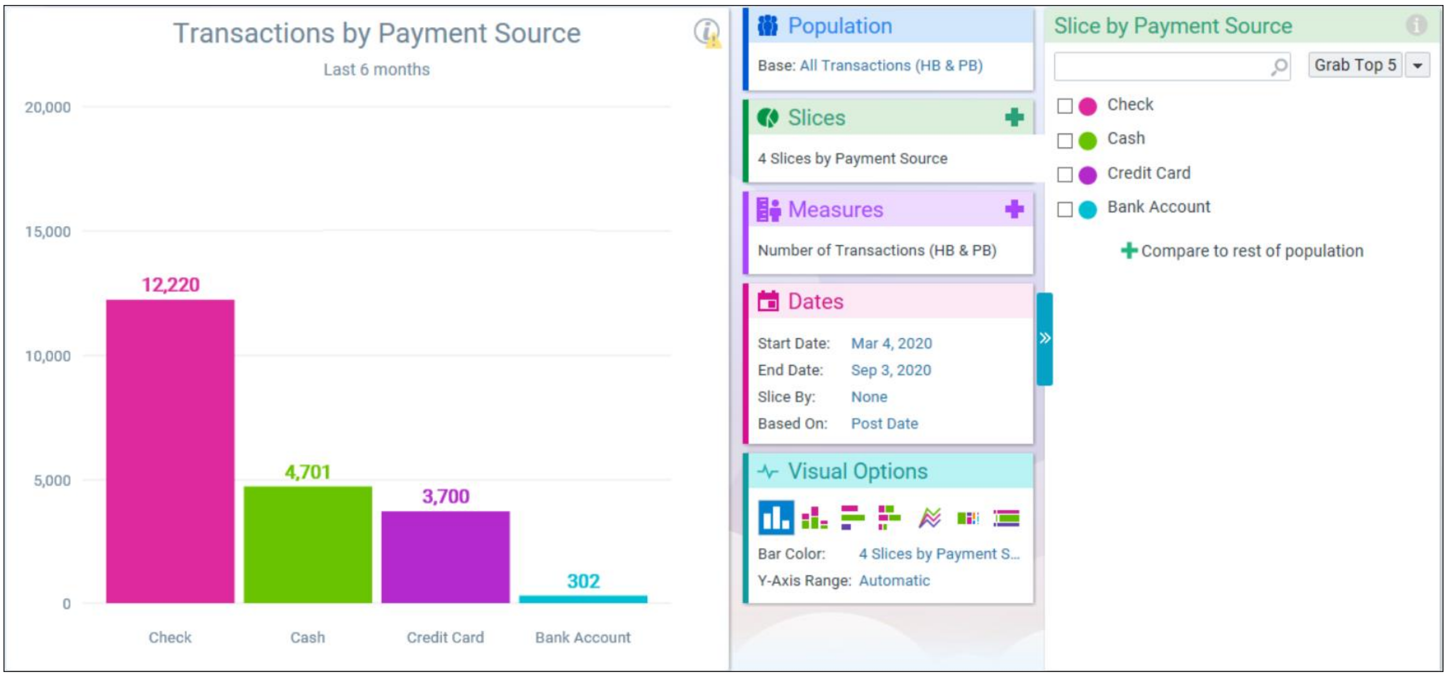
Delve Deeper into Transaction Data in SlicerDicer

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.



New Look

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.

New Look

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

Payer response dates:	9/29/2020 to 10/5/2020
Service areas:	Model system, WI HARBOR BLUFF HOSPITALS, WI Split Bluffs Organization
Group by:	Workqueue, Lag Start Activity

Summary

0 to 30 Days	31 to 60 Days	Over 60 Days	Total Activities	Average Lag (Days)
11	0	0	11	0.0

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]

	Activities 0 to 30 Days		Activities 31 to 60 Days		Activities Over 60 Days			
Lag Start Activity	Count	% of Total	Count	% of Total	Count	% of Total	Total Activities	Avg Lag (Days)
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

Key Change

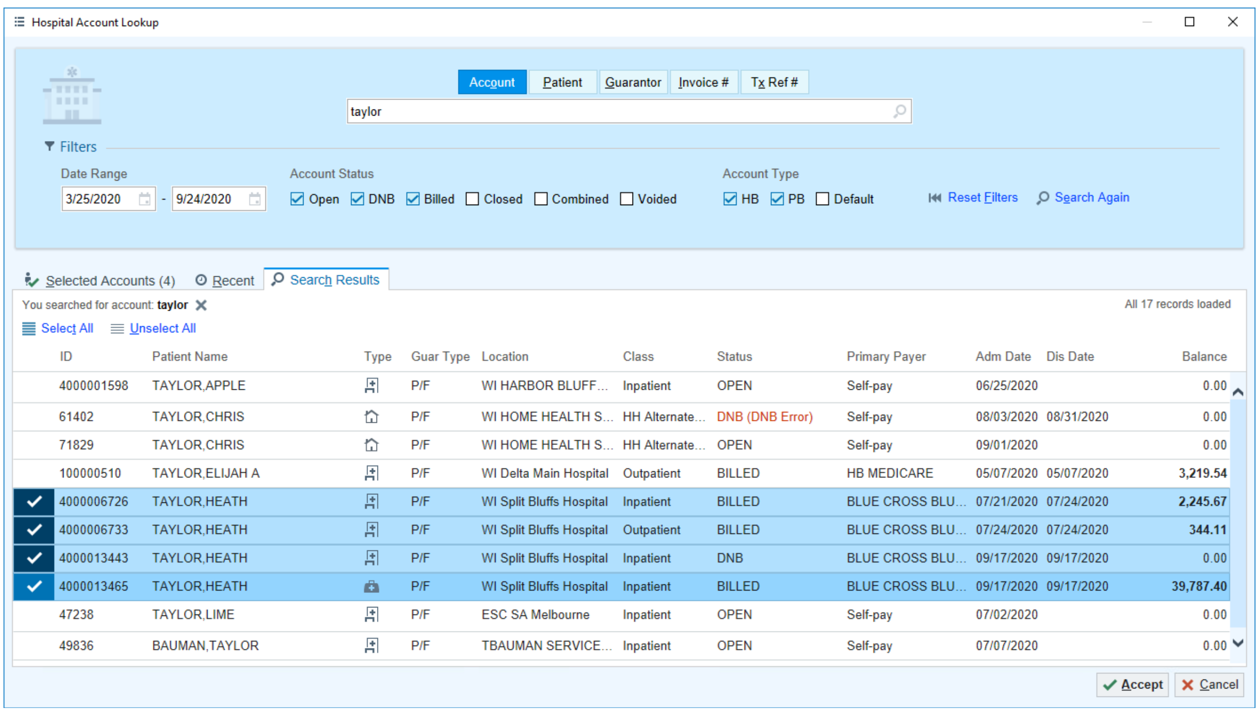
Paste Like a Pro in Hospital Account Lookup

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.



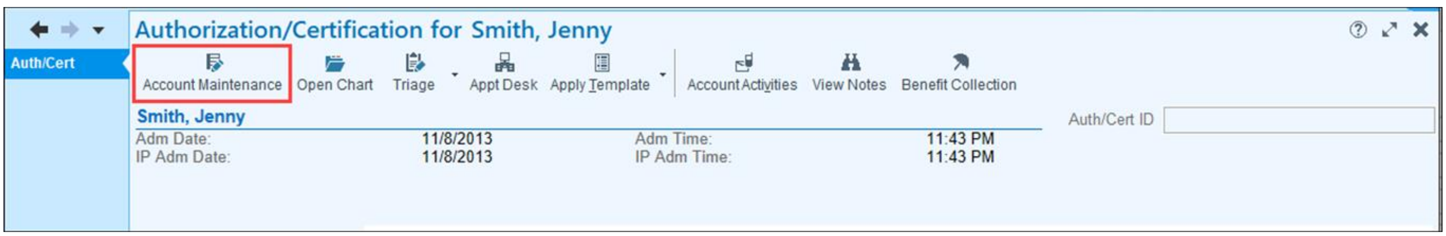
Account Maintenance Button in Auth/Cert Records Opens Encounter's Primary HB HAR

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.



Guarantor Account Maintenance

Key Change

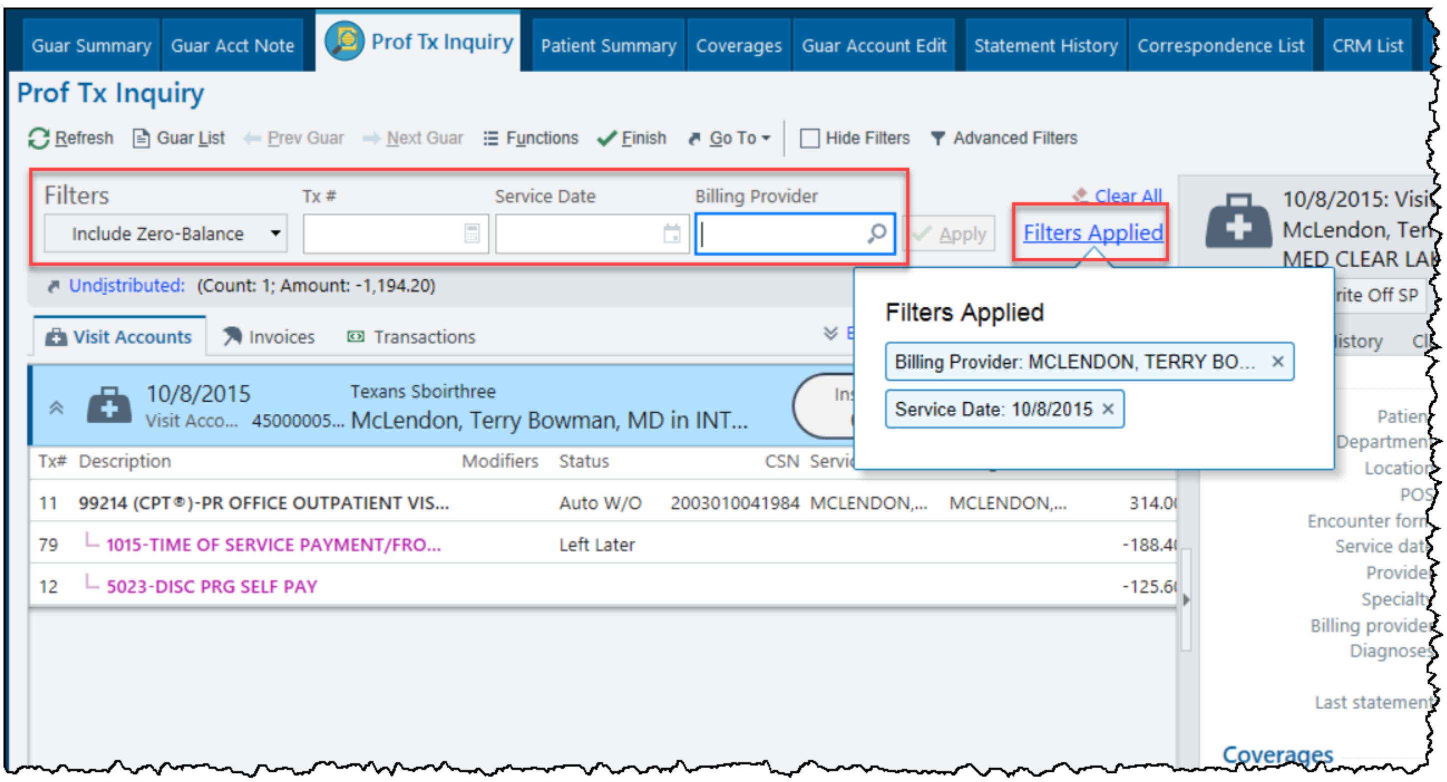
Simple Filters in Inquiry

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.



Payments and Transactions

Key Change

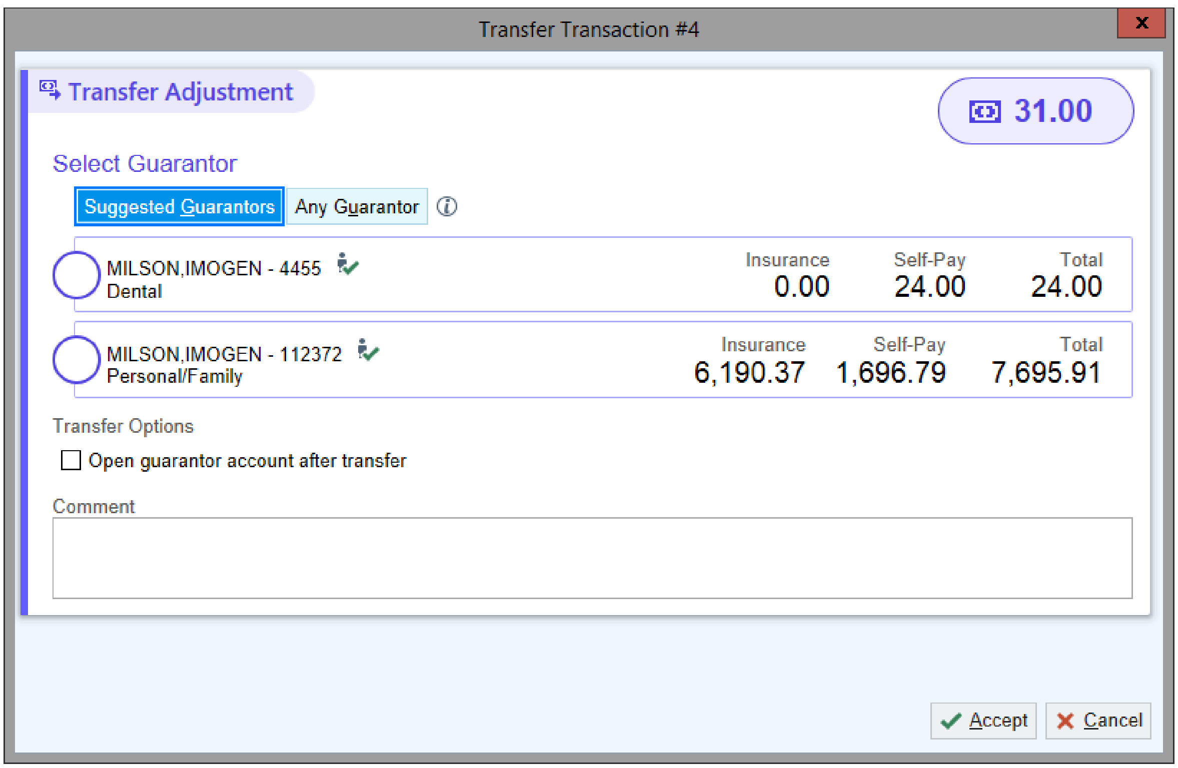
Transfer to System-Suggested Guarantors

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.



Key Change: Easily Create Payment Plans from Enterprise Guarantor Summary

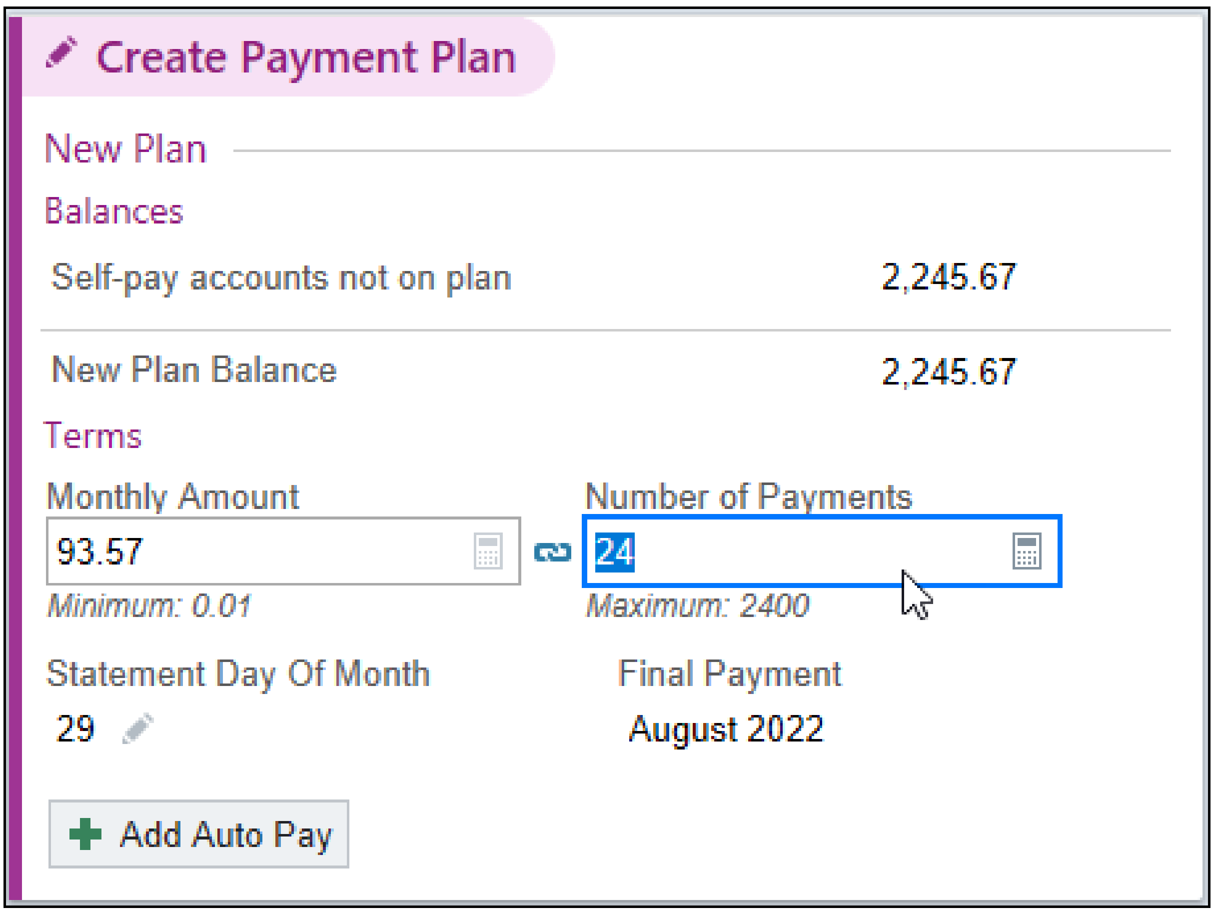
Key Benefits:

- 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.



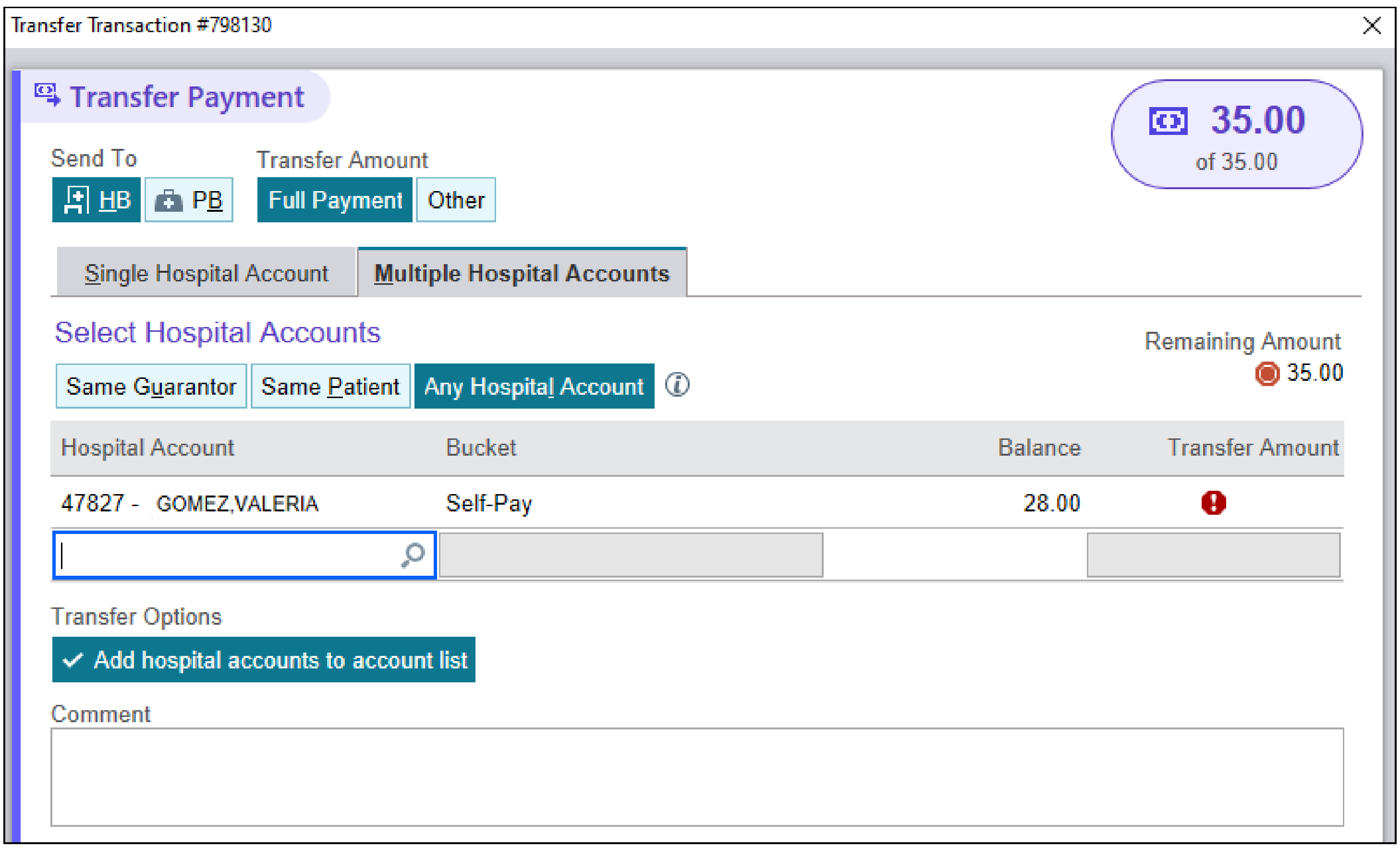
Distribute Action Replaced by Transfer to Multiple in Transfer Transaction

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.



Key Change

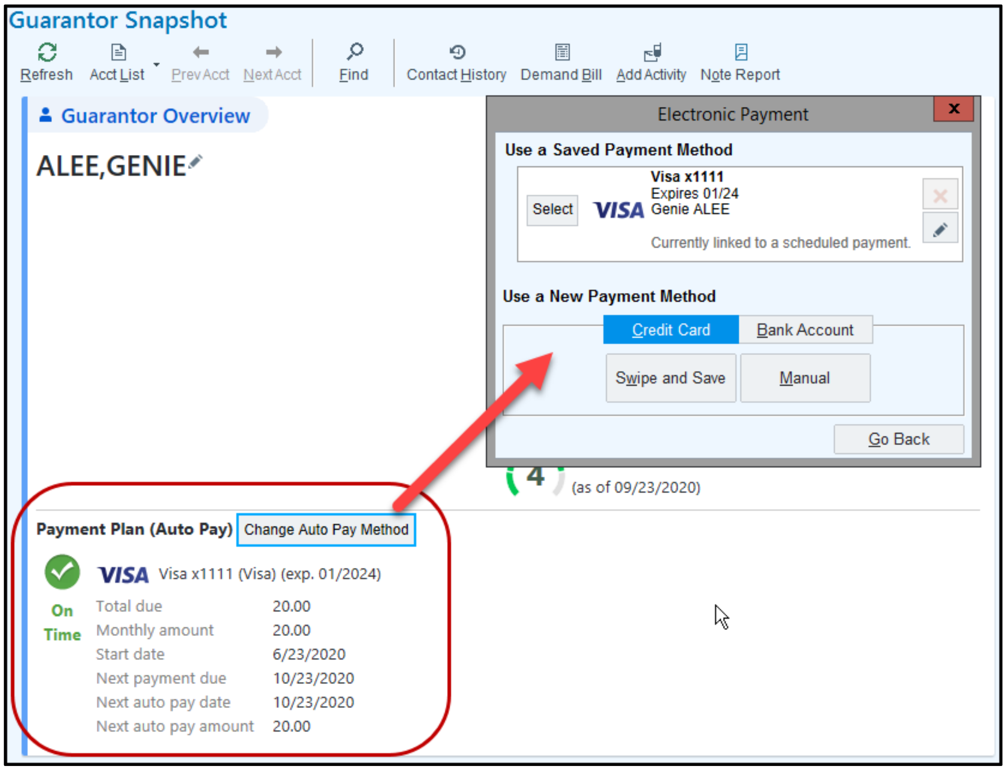
Edit Auto-Pay Payment Methods in Guarantor Snapshot

Key Benefits:

- Time saver

Description:

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



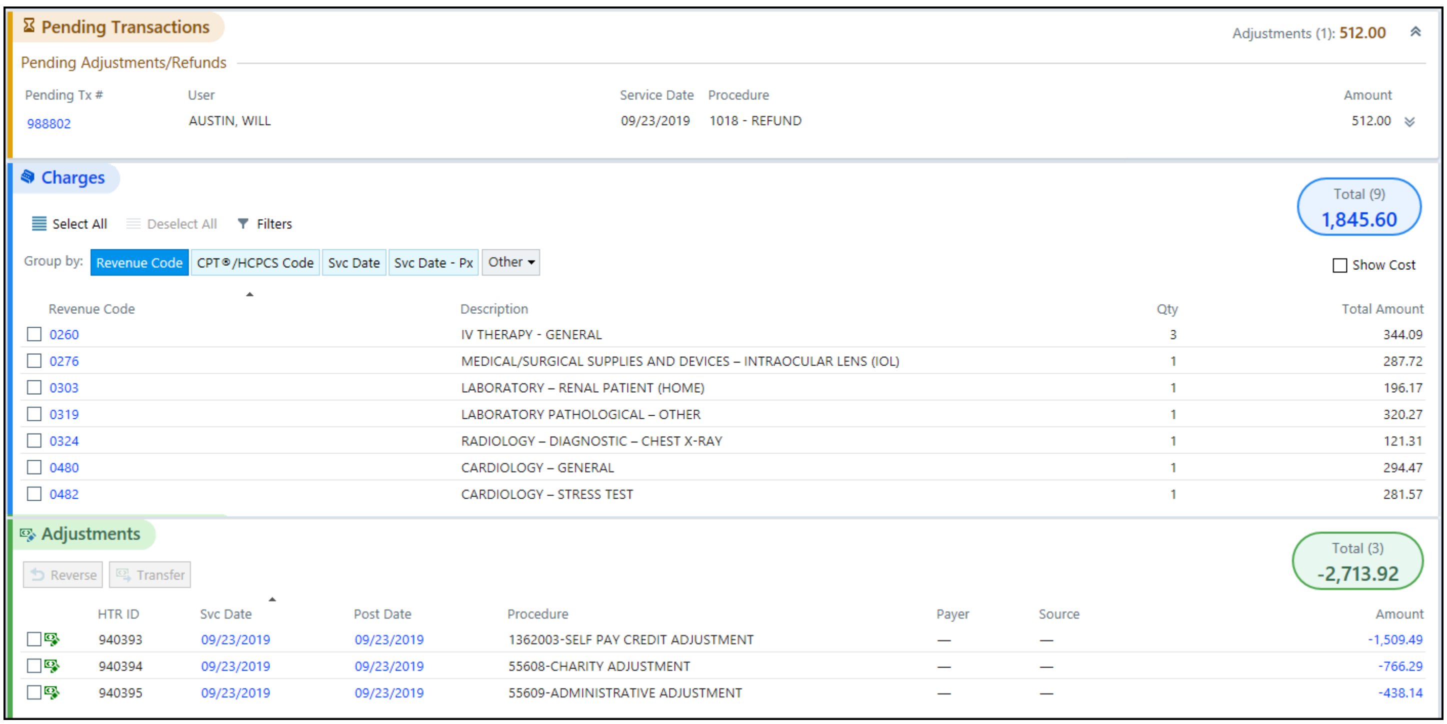
Quickly Review and Act on Transactions

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.



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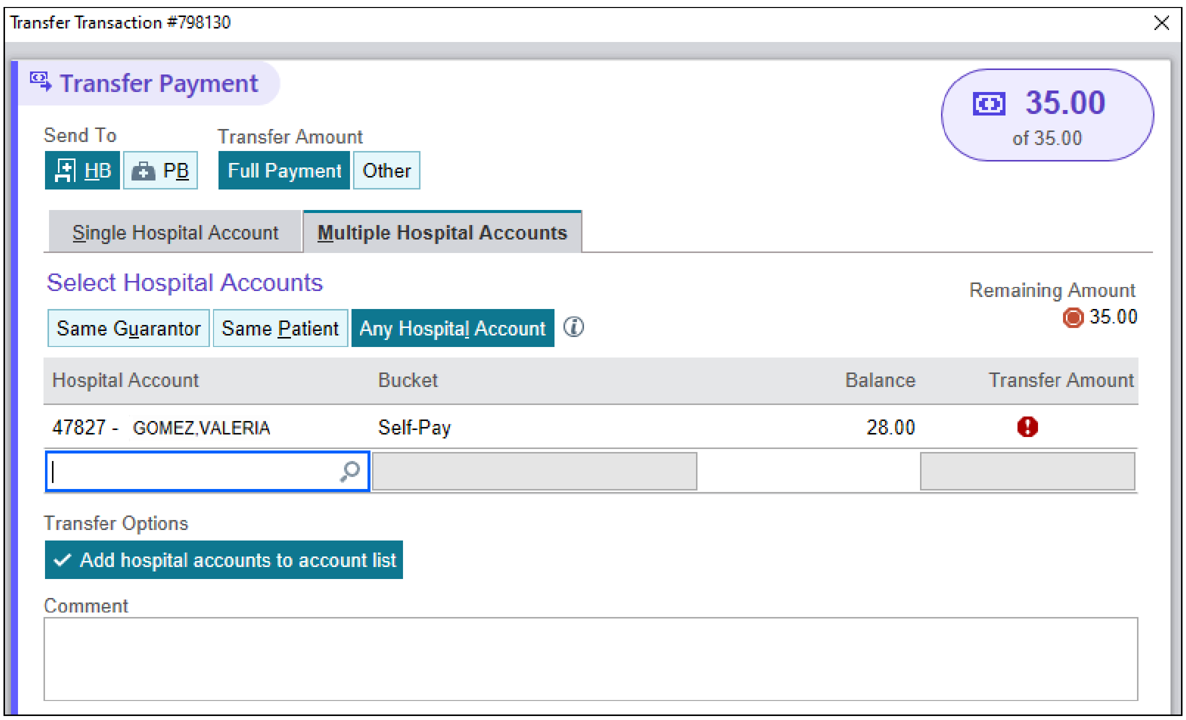


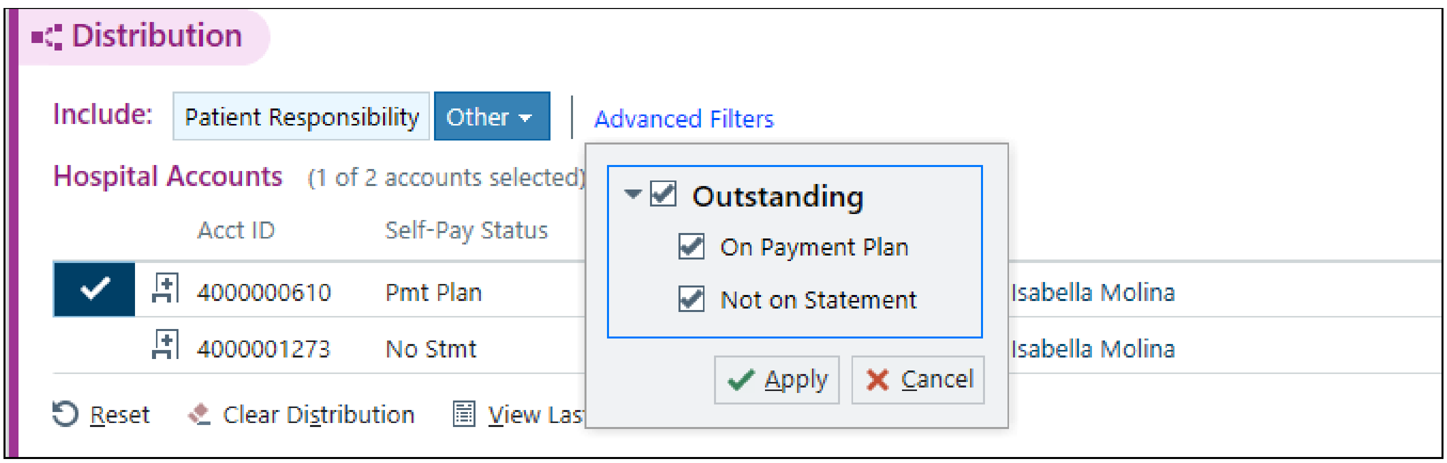
New Look, Simplified Workflow for Enterprise Self-Pay Payment Posting

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.



New Feature

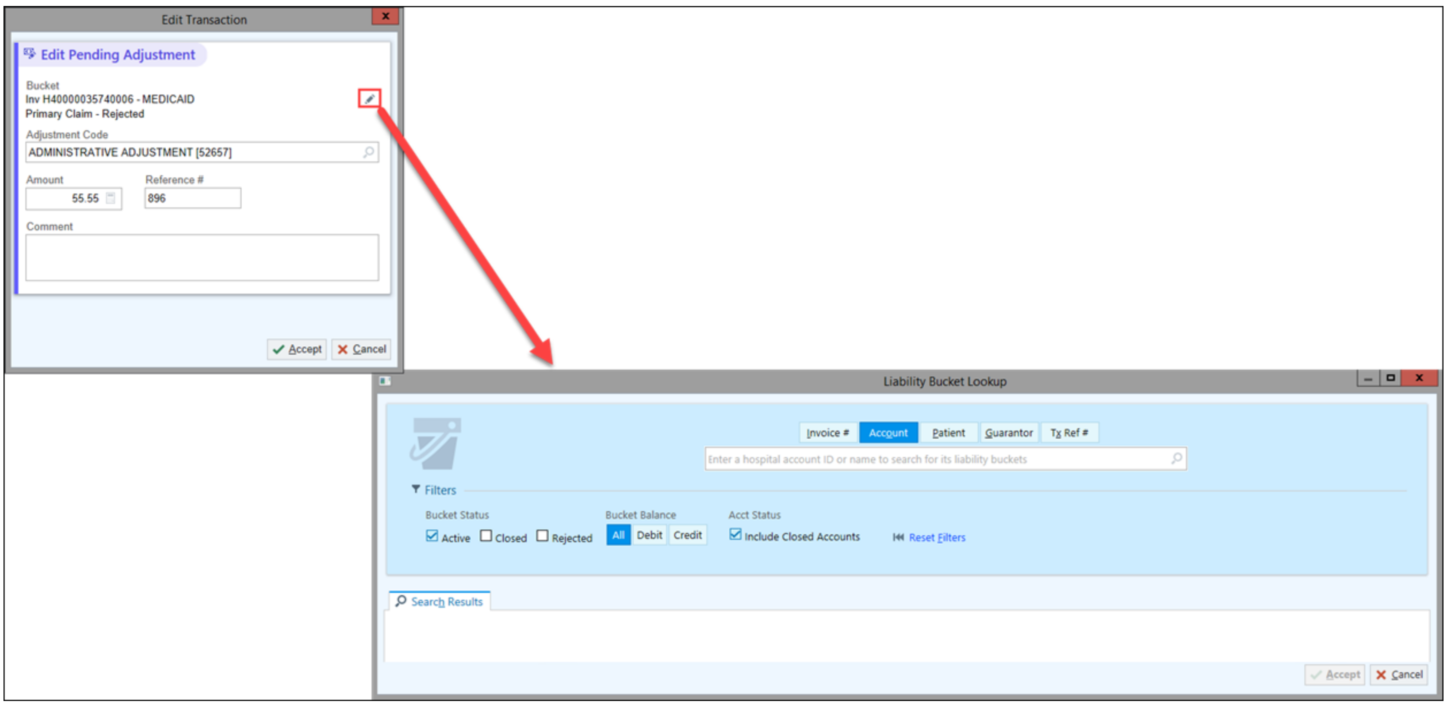
Get More Precise with Your Adjustment Edits in Liability Bucket Lookup

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.



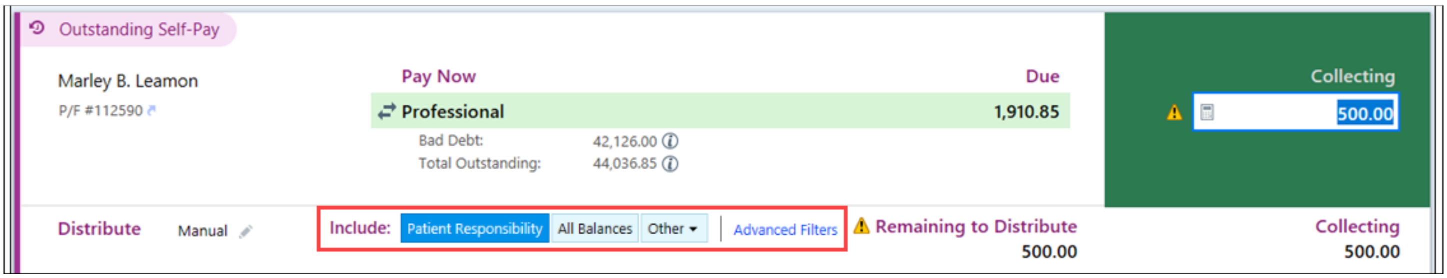
Use Quick Distribution Shortcuts in Payment Collection

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.



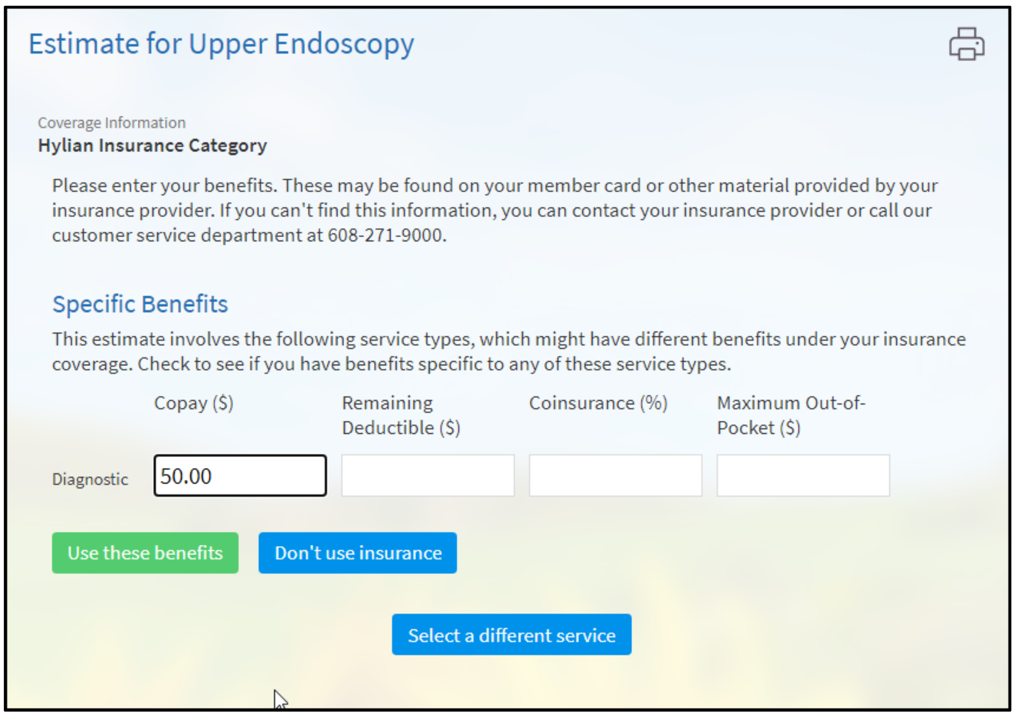
New Feature: Process Self-Service Estimates with Only Service-Level Benefits

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.



Time Saver

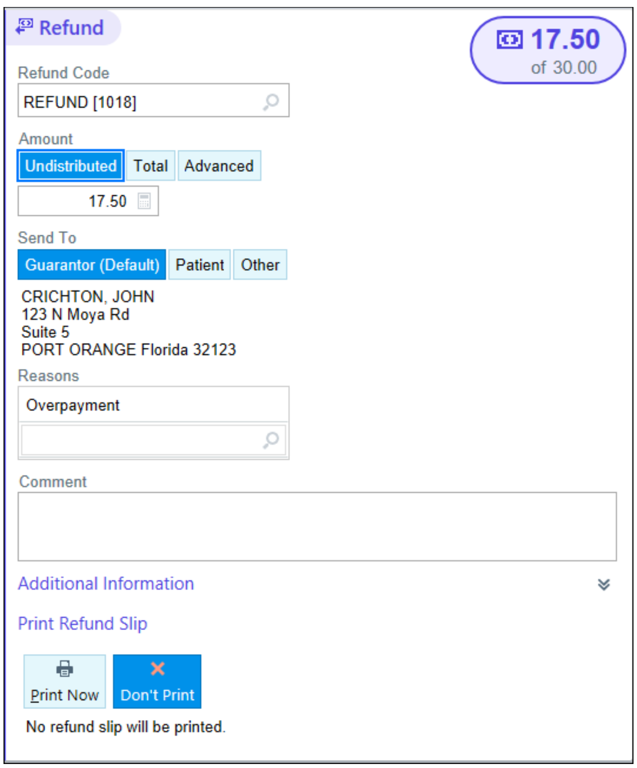
Quickly Process Back-End Refunds with Amount Shortcuts

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.**



Cash Management

New Feature

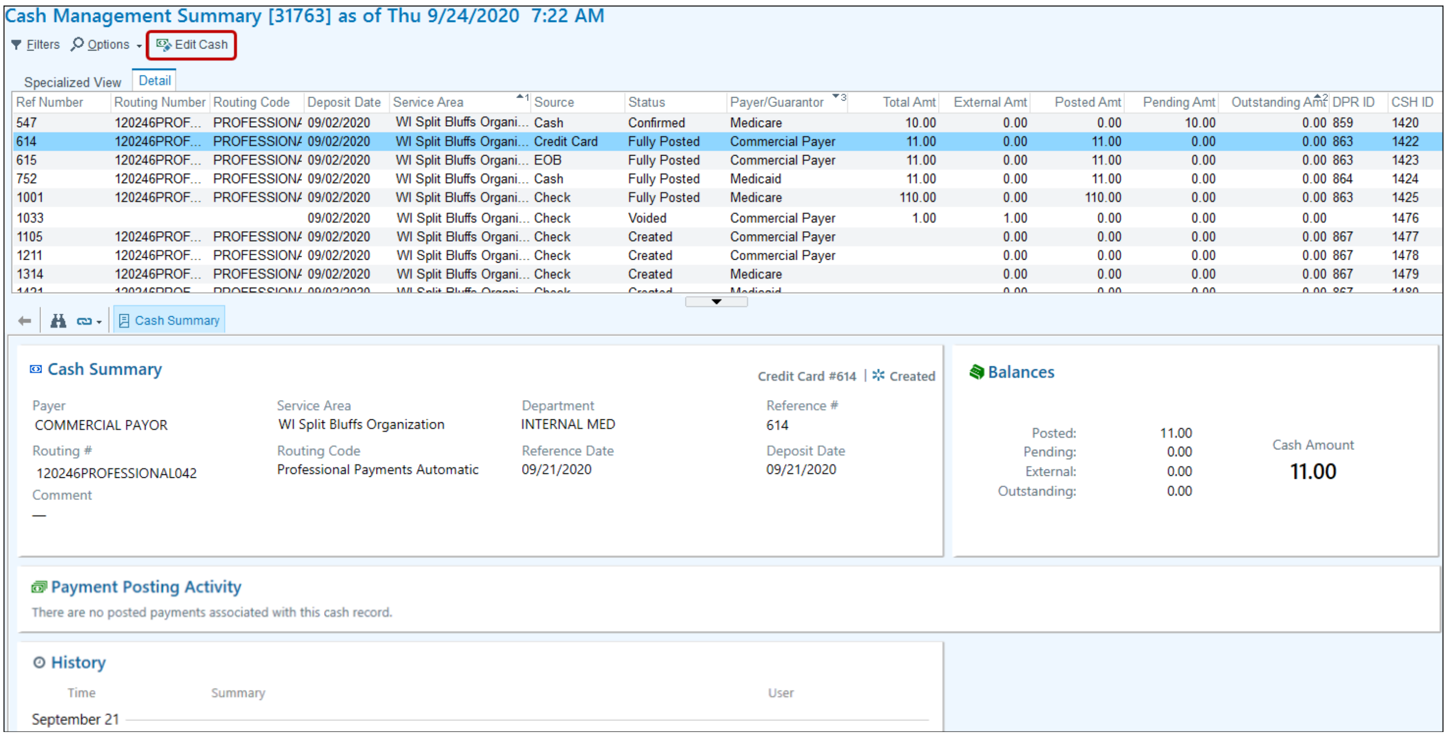
New Reports on Cash Records and Control Groups

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.



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...	PROFESSIONA	09/02/2020	WI Split Bluffs Organi...	Cash	Confirmed	Medicare	10.00	0.00	0.00	10.00	0.00	859	1420
614	120246PROF...	PROFESSIONA	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...	PROFESSIONA	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...	PROFESSIONA	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...	PROFESSIONA	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...	PROFESSIONA	09/02/2020	WI Split Bluffs Organi...	Check	Created	Commercial Payer		0.00	0.00	0.00	0.00	867	1477
1211	120246PROF...	PROFESSIONA	09/02/2020	WI Split Bluffs Organi...	Check	Created	Commercial Payer		0.00	0.00	0.00	0.00	867	1478
1314	120246PROF...	PROFESSIONA	09/02/2020	WI Split Bluffs Organi...	Check	Created	Medicare		0.00	0.00	0.00	0.00	867	1479

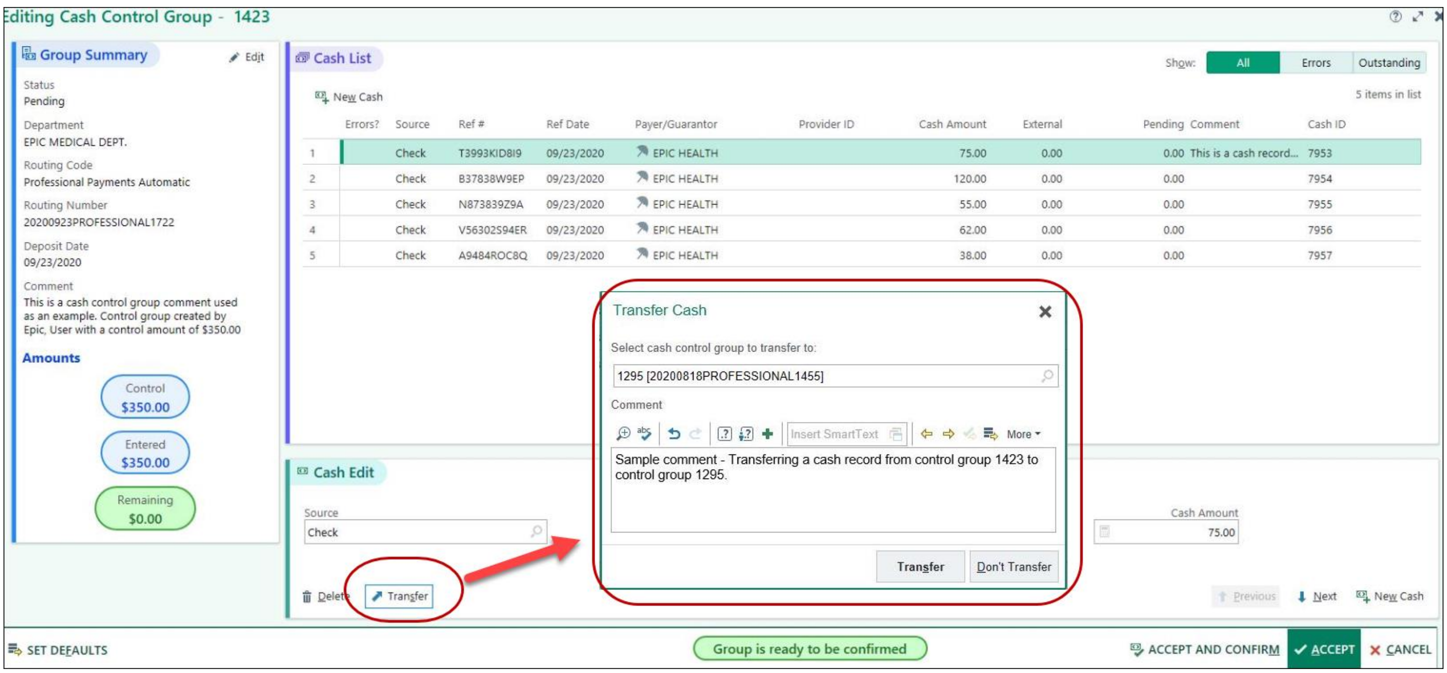
Transfer Cash Records with One Action

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.



New Feature

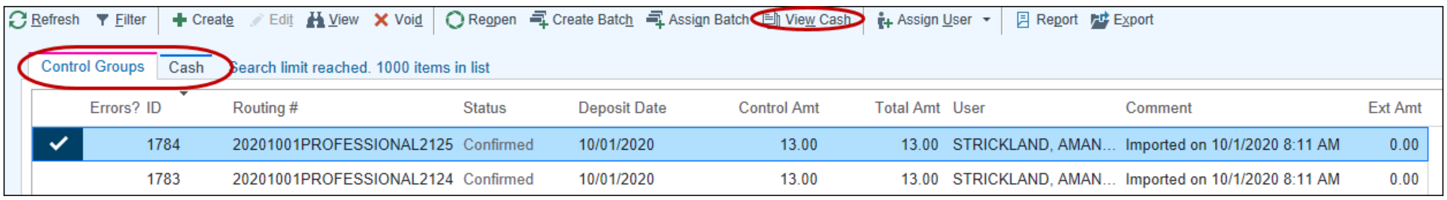
View Cash Lists and Control Groups in Cash Management

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.



General Updates

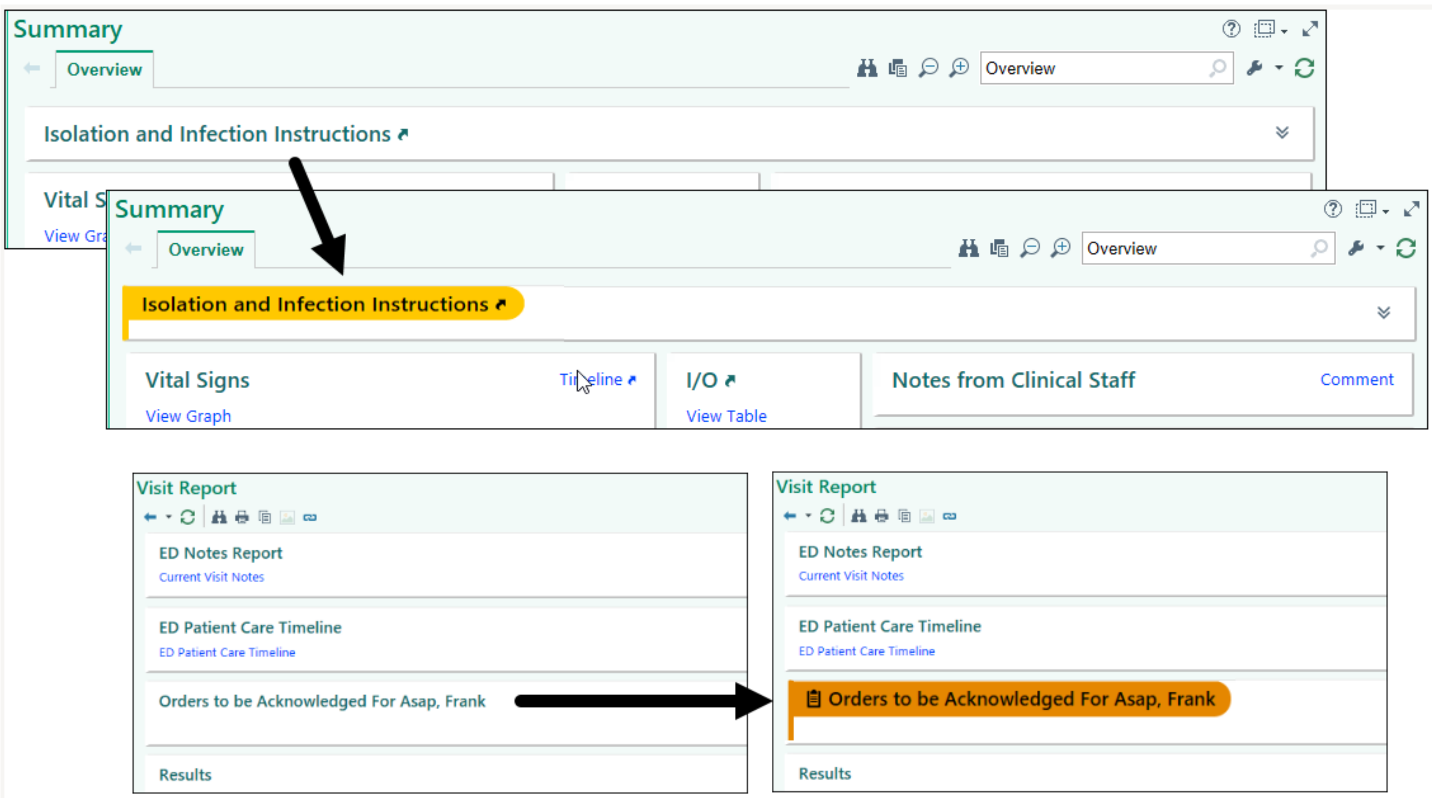
Colored Headers for Important Information More Consistently Appear for Users with Fewer Colors Setting

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:

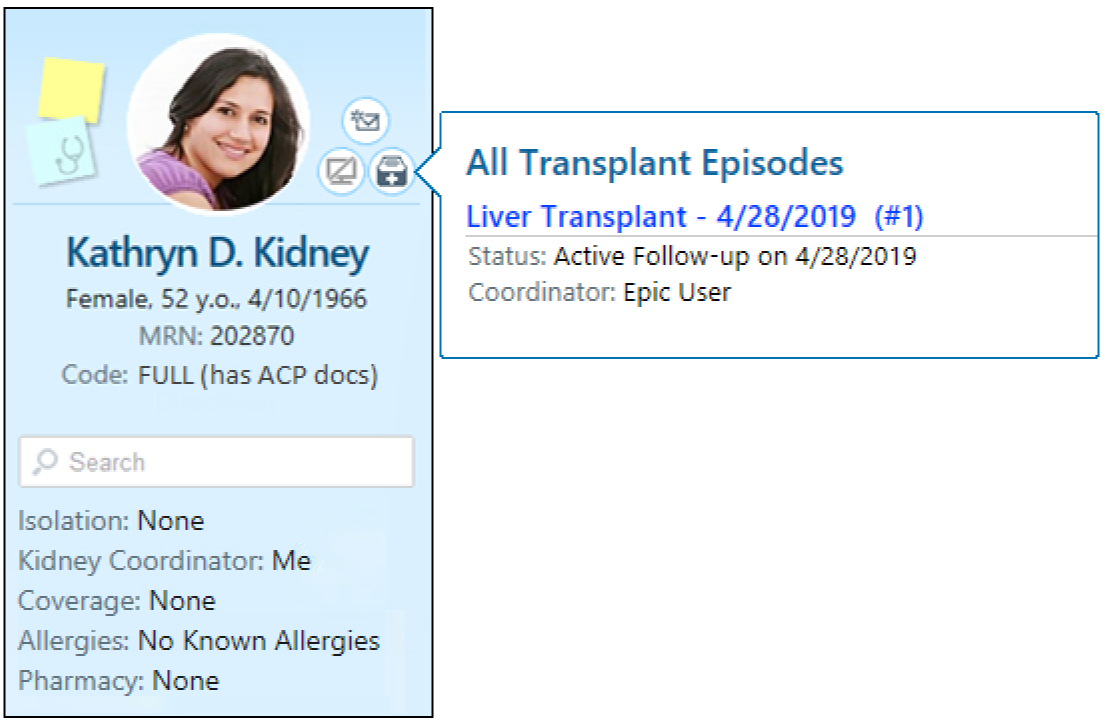
- Easily accessible in Storyboard

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.



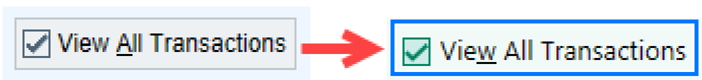
It's Easier to Tell When a Toolbar Button Is Selected

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.



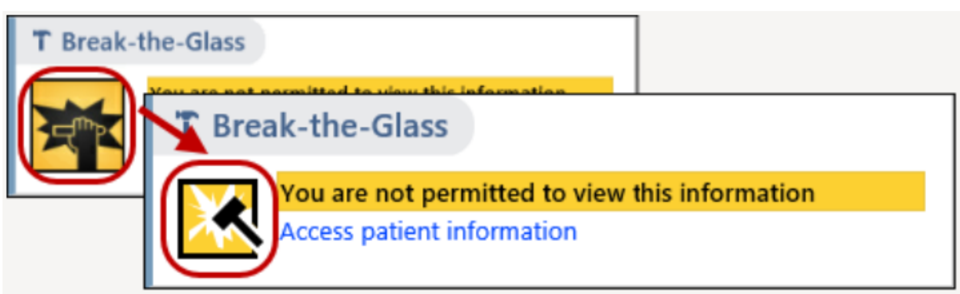
New Break-the-Glass Icon in Reports

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.

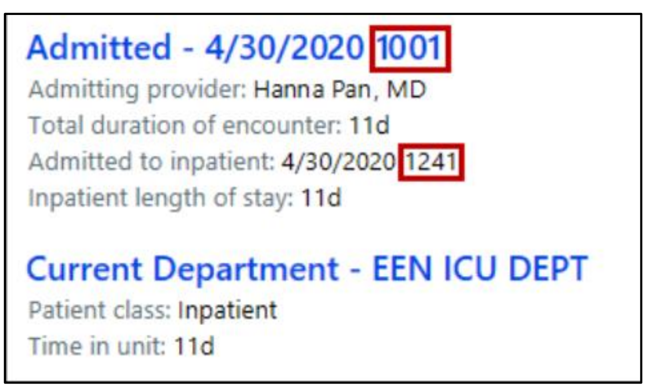
See a Patient's Admission Time in Storyboard

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:

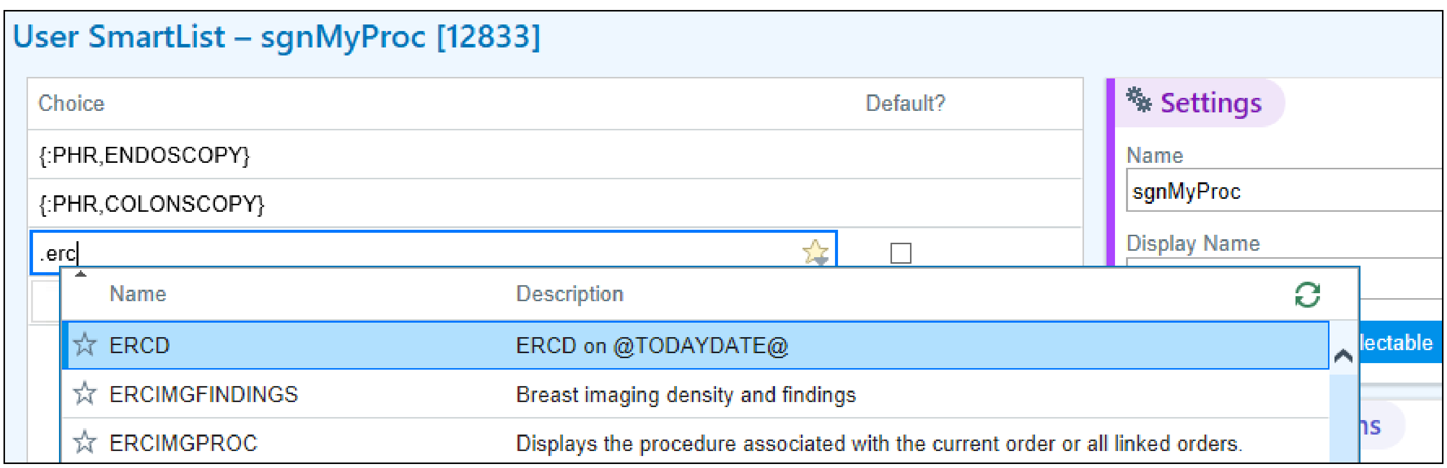
- Personalizing your workflow.

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.



New Look

MyChart's New Home Page

Key Benefits:

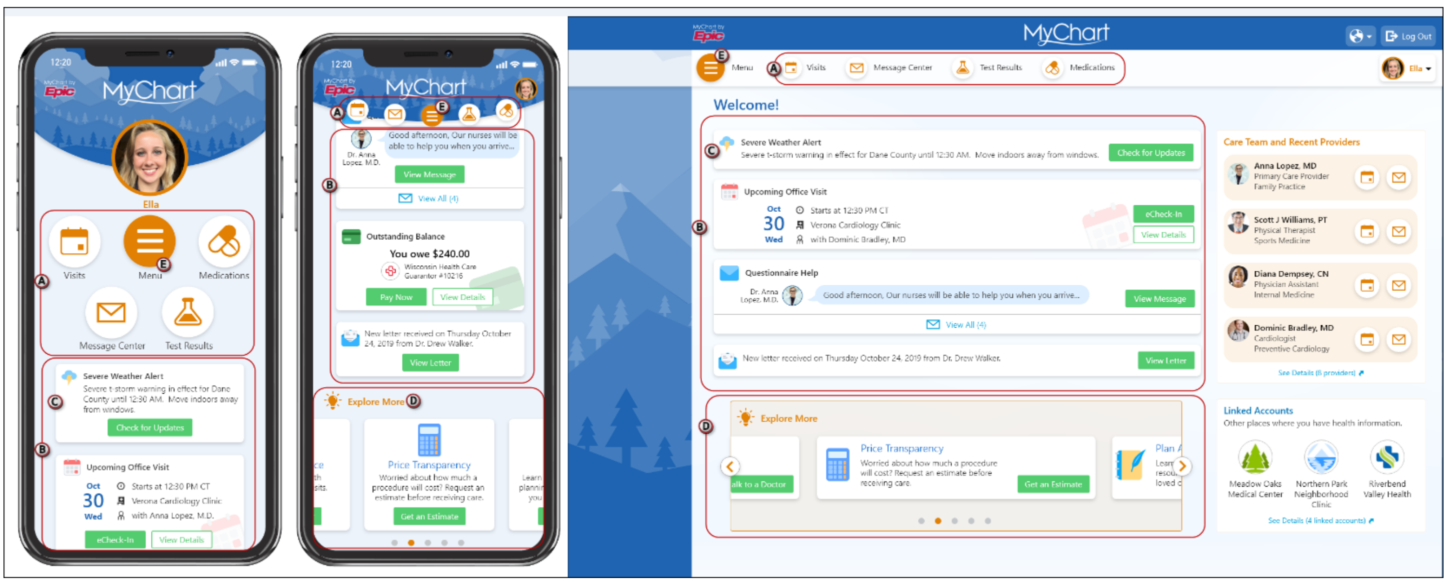
- Improved workflow
- More efficient

YouTube View the [New MyChart Experience](#) video.

Description:

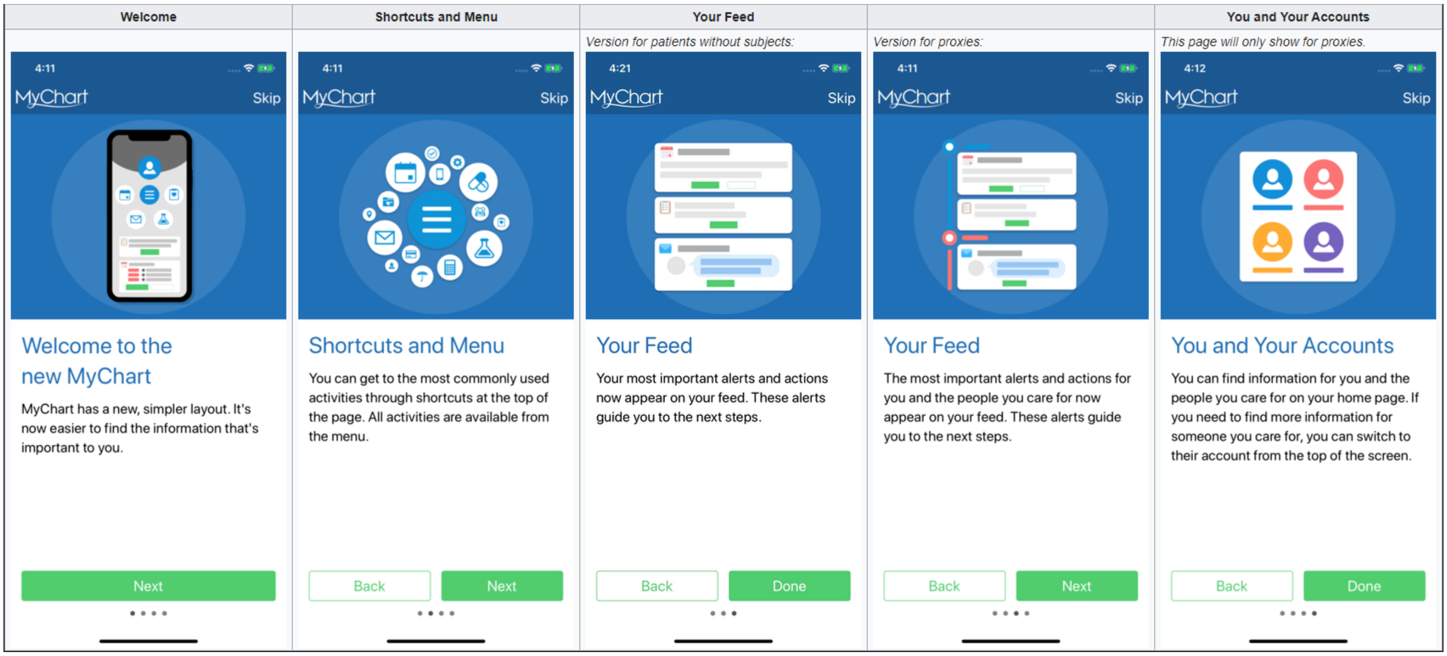
The **MyChart** homepage and user experience is being redesigned to make it cleaner and easier to use. All features and functionality are available on both the web and mobile app platform. The new design provides shortcuts to common activities and an actionable list of updates for the patient.

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.

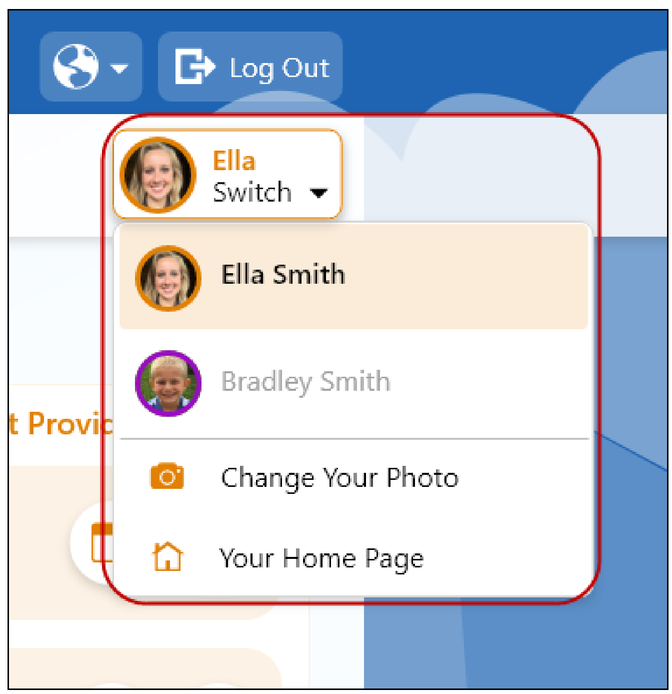


- Shortcuts on the homepage provide easy access to the four activities a patient uses the most.
- The **health feed** is a consolidated view of actionable health updates, including appointment reminders, check-in tasks and messages from the patient's care team.
- Information for proxies and patients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

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

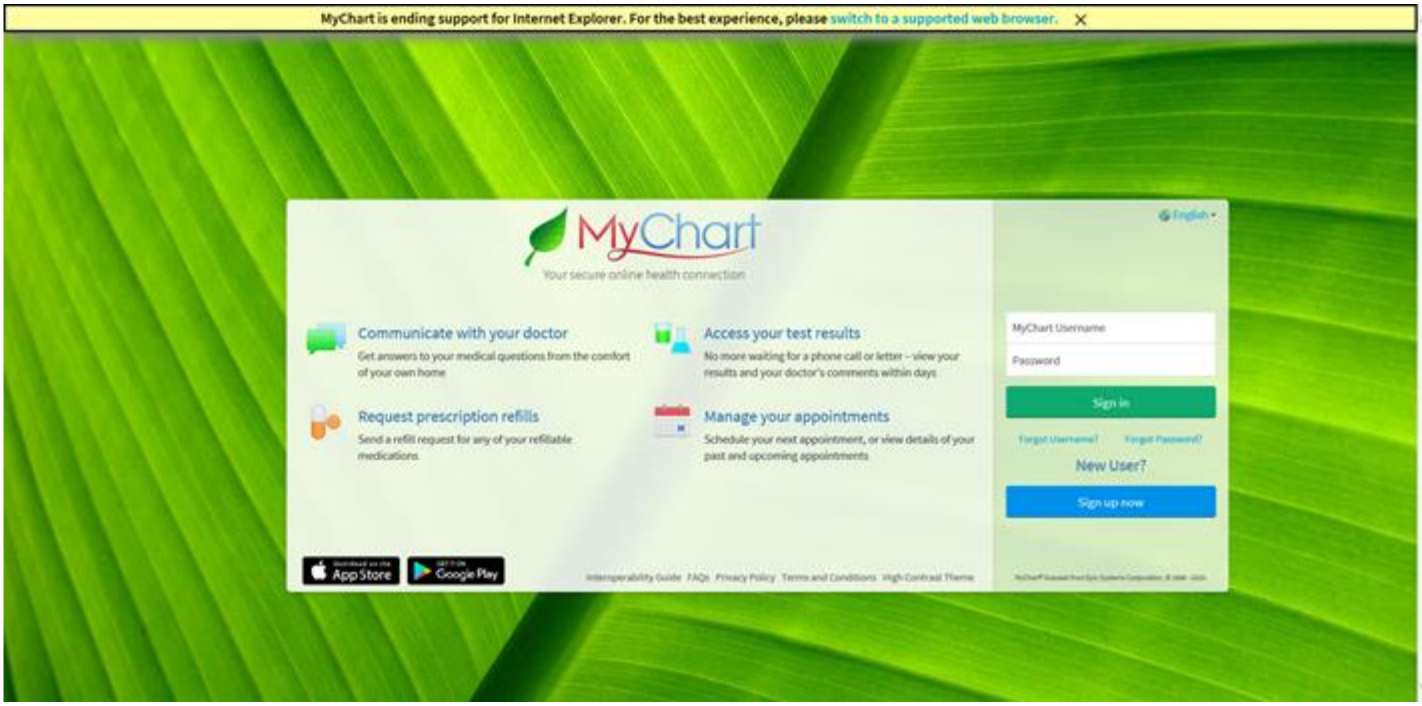
Key Benefits:

- 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.**


MyChart is ending support for Internet Explorer. For the best experience, please switch to a supported web browser.
MyChart
Your secure online health connection
Communicate with your doctor
Get answers to your medical questions from the comfort of your own home
Access your test results
No more waiting for a phone call or letter – view your results and your doctor's comments within days
Request prescription refills
Send a refill request for any of your refillable medications
Manage your appointments
Schedule your next appointment, or view details of your past and upcoming appointments
MyChart Username
Password
Sign in
New User?
Sign up now
App Store
Google Play