

Feb. 21 Epic *Update Companion*



Single Billing Office Staff

Updated: 1/26/21

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

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

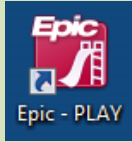
- Customer Service Representatives
- Self-Pay Follow-up and Collection Representatives
- Payment Posters

Top Changes for Role/Department:

1. [Simple filters help in the new one Inquiry tab in Guarantor Account Maintenance.](#)
2. [Easily create payment plans from Enterprise Guarantor Summary.](#)
3. [Use quick distribution shortcuts in Payment Collection.](#)
4. [Paste like a pro in Hospital Account Lookup.](#)
5. [Transfer payments to system-suggested guarantors.](#)



If you need help with Epic, be sure to visit our library of tip sheets in the Epic Learning Home. Simply press F1 on your keyboard while logged in to Epic.



Guided Playground Practice

Exercises to help you prepare for the coming changes.

After reviewing this document, use it as a guide to see the new features for yourself in the Epic Playground. Playground practice helps you prepare for the update so you can stay focused on patient care.

Playground User ID: sboadm

Playground Password: epic

Key workflows for you to practice include:

- Open a guarantor account in Guarantor Account maintenance and explore the new Inquiry tab.
- Open an account with an outstanding self-pay balance in Account Maintenance and create a payment plan from Enterprise Guarantor Summary.
- Open an account with an outstanding self-pay balance and from Payment Collection, use the quick distribution shortcuts that have been added.



Account Maintenance



Paste Like a Pro in Hospital Account Lookup

Key Benefits:

- More efficient
- Time saver

[Watch a brief video on this functionality.](#)

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** for, **select**, and **open** as many HARs as you want at a time.

The screenshot shows the 'Hospital Account Lookup' application window. 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 are filter sections for 'Date Range' (3/25/2020 to 9/24/2020), 'Account Status' (Open, DNB, Billed, Closed, Combined, Voiced), and 'Account Type' (HB, PB, Default). There are 'Reset Filters' and 'Search Again' buttons. Below the filters, it says 'Selected Accounts (4)' and 'Recent Search Results'. A table displays 17 records with columns: ID, Patient Name, Type, Guar Type, Location, Class, Status, Primary Payer, Adm Date, Dis Date, and Balance. The table is partially selected, with rows for TAYLOR,HEATH and TAYLOR,LIME highlighted. At the bottom right, 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.

Authorization/Certification for Smith, Jenny

Auth/Cert ID:

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



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 in Epic. 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 populated with 'MCLENDON, TERRY BO...' and has a search icon. To the right of the filters is an 'Apply' button and a 'Clear All' button. A 'Filters Applied' popup window is open, showing the applied filters: 'Billing Provider: MCLENDON, TERRY BO...' and 'Service Date: 10/8/2015'. Below the filters, there is a summary for 'Undistributed: (Count: 1; Amount: -1,194.20)'. The main area shows a patient summary for '10/8/2015 Texans Sboirthree' with a visit account '45000005... McLendon, Terry Bowman, MD in INT...'. Below this is a table of transactions:

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



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 of a 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

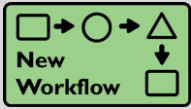
Self-pay accounts not on plan	2,245.67
New Plan Balance	2,245.67

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 Full Payment Other

Transfer Amount:

Single Hospital Account Multiple Hospital Accounts

Select Hospital Accounts Remaining Amount 35.00

Same Guarantor Same Patient Any Hospital Account ⓘ

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 sub-options for 'Swipe and Save' and 'Manual'. A 'Go Back' button is at the bottom right of the dialog.

On	Time	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

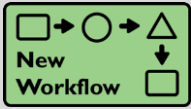
Adjustments

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 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.

Transfer Transaction #798130

Transfer Payment 35.00 of 35.00

Send To: HB PB Full Payment Other

Transfer Amount:

Single Hospital Account Multiple Hospital Accounts

Select Hospital Accounts Remaining Amount 35.00

Same Guarantor Same Patient Any Hospital Account ⓘ

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 dialog box is open over the table, titled 'Outstanding', with a dropdown arrow and a checked checkbox. Inside the dialog, there are two options: 'On Payment Plan' (checked) and 'Not on Statement' (checked). At the bottom of the dialog are 'Apply' and 'Cancel' buttons. The name 'Isabella Molina' is visible on the right side of the table rows.

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





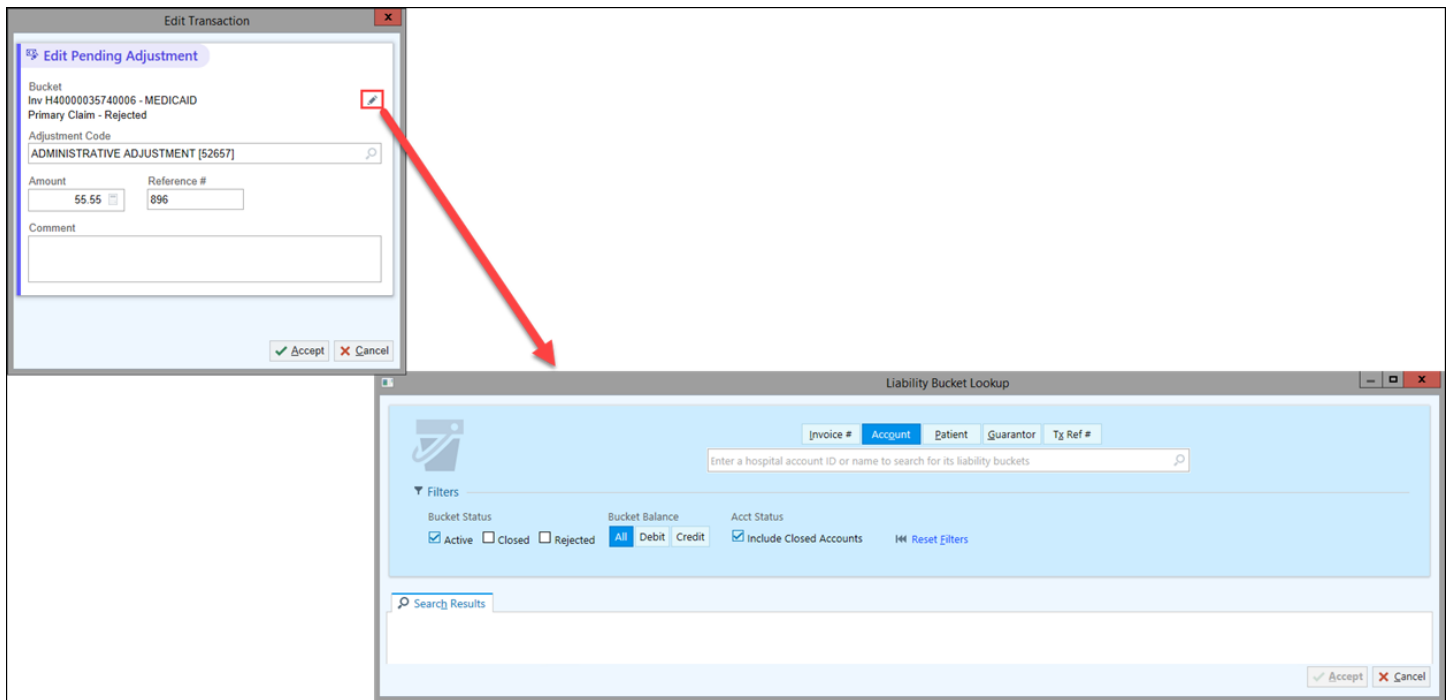
Get More Precise with Your Adjustment Edits in Liability Bucket Lookup

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'. Below this, the 'Refund Code' field contains 'REFUND [1018]'. The 'Amount' section has three tabs: 'Undistributed' (selected), 'Total', and 'Advanced'. The 'Undistributed' tab shows the amount '17.50'. The 'Send To' section has three tabs: 'Guarantor (Default)' (selected), 'Patient', and 'Other'. Below these tabs, the guarantor information is listed: 'CRICHTON, JOHN', '123 N Moya Rd', 'Suite 5', 'PORT ORANGE Florida 32123'. The 'Reasons' section has a dropdown menu with 'Overpayment' selected. There is a 'Comment' text area below. At the bottom, there is an 'Additional Information' section with a dropdown arrow, a 'Print Refund Slip' link, and two buttons: 'Print Now' and 'Don't Print'. Below the buttons, a message states 'No refund slip will be printed.'



Cash Management



New Reports on Cash Records and Control Groups

Key Benefits:

- Financial benefit
- More accuracy and reliability

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	Service Area	Department	Reference #
COMMERCIAL PAYOR	WI Split Bluffs Organization	INTERNAL MED	614
Routing #	Routing Code	Reference Date	Deposit Date
120246PROFESSIONAL042	Professional Payments Automatic	09/21/2020	09/21/2020
Comment	—		

Balances

Posted:	11.00	Cash Amount
Pending:	0.00	
External:	0.00	
Outstanding:	0.00	
		11.00

Payment Posting Activity

There are no posted payments associated with this cash record.

History

Time	Summary	User
September 21		



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
1401	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
 Service Area: WI Split Bluffs Organization
 Department: INTERNAL MED
 Reference #: 614
 Routing #: 120246PROFESSIONAL042
 Routing Code: Professional Payments Automatic
 Reference Date: 09/21/2020
 Deposit Date: 09/21/2020
 Comment: —

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 | Edit

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 | Show: All | Errors | Outstanding | 5 items in list

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

Cash Edit

Source: Check

Transfer Cash Dialog:

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

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

Buttons: Transfer, Don't Transfer

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



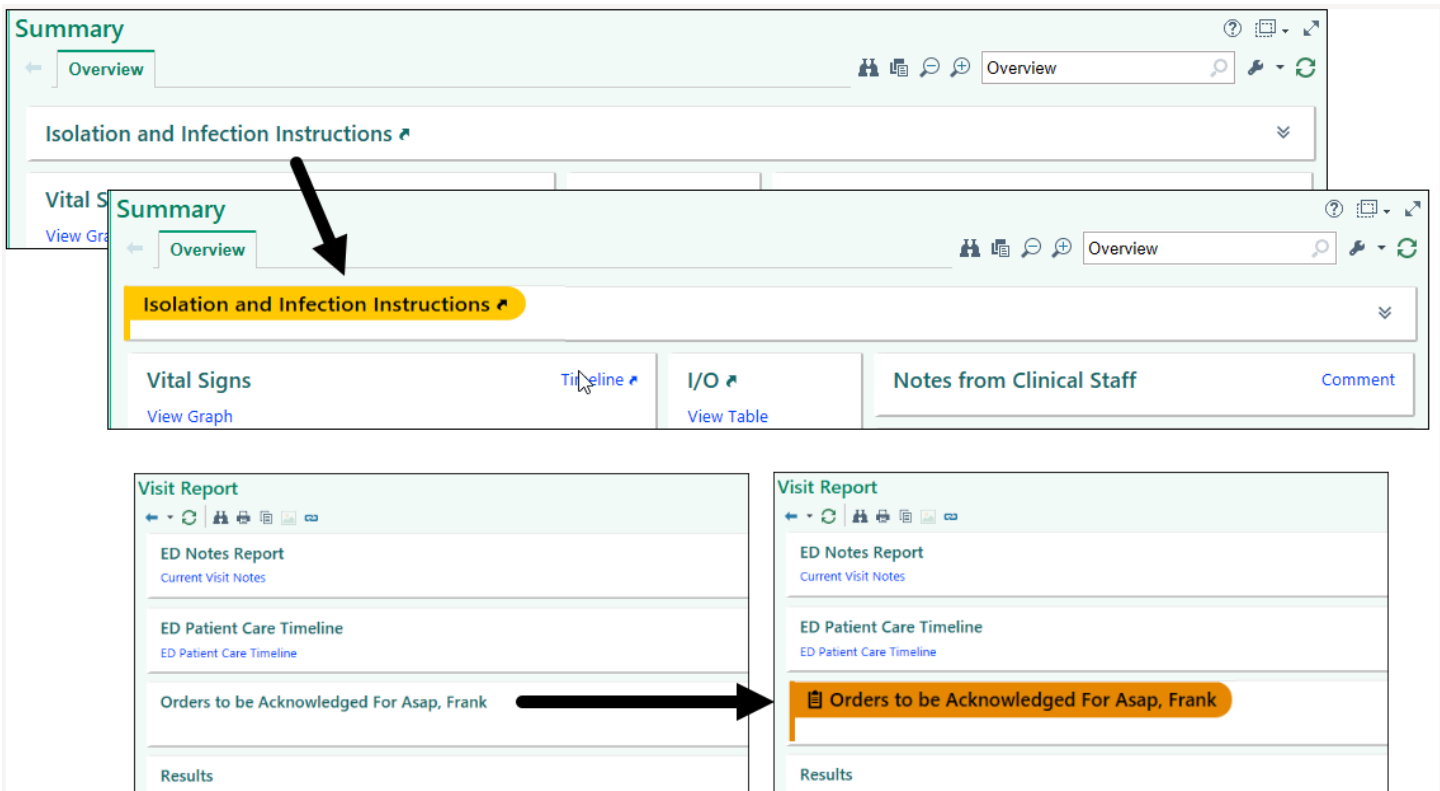
Colored Headers for Important Information More Consistently Appear for Users with Fewer Colors Setting

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.



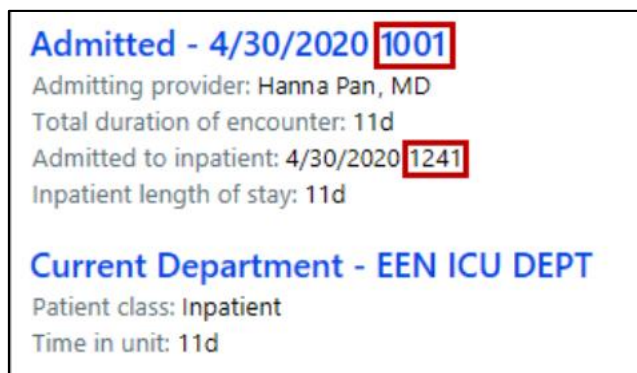
See a Patient's Admission Time in Storyboard

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 Epic, **Haiku** and **Canto**.

How to:

1. In Epic, go to the **SmartList Editor** (search: SmartList) and create a SmartList. If you have the security to create system SmartLists, you need to select the **User** option.
2. If you know the dot phrase for the SmartPhrase you want to add, type it in the editor.
3. If you need to look up the SmartPhrase,
 - a. Click the **star icon** in the **Choice** field to open the **SmartTool Options** menu.
 - b. Select **List Phrases**.
 - c. Find and add the SmartPhrase you want to include by clicking **Add to Text**.
4. To select a SmartPhrase from a user SmartList in a document:
 - a. Insert the SmartList into a SmartTool-enabled text box or press **F2** to jump to the SmartList if it already appears.
 - b. Select the SmartPhrase from the SmartList and right-click in the SmartList to save your selection and move to the next wildcard or SmartList.

User SmartList – sgnMyProc [12833]

Choice	Default?
{:PHR,ENDOSCOPY}	
{:PHR,COLONSCOPY}	
.ercd	<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 Staff Feb. 21 Epic Update Companion



MyChart's New Home Page

Key Benefits:

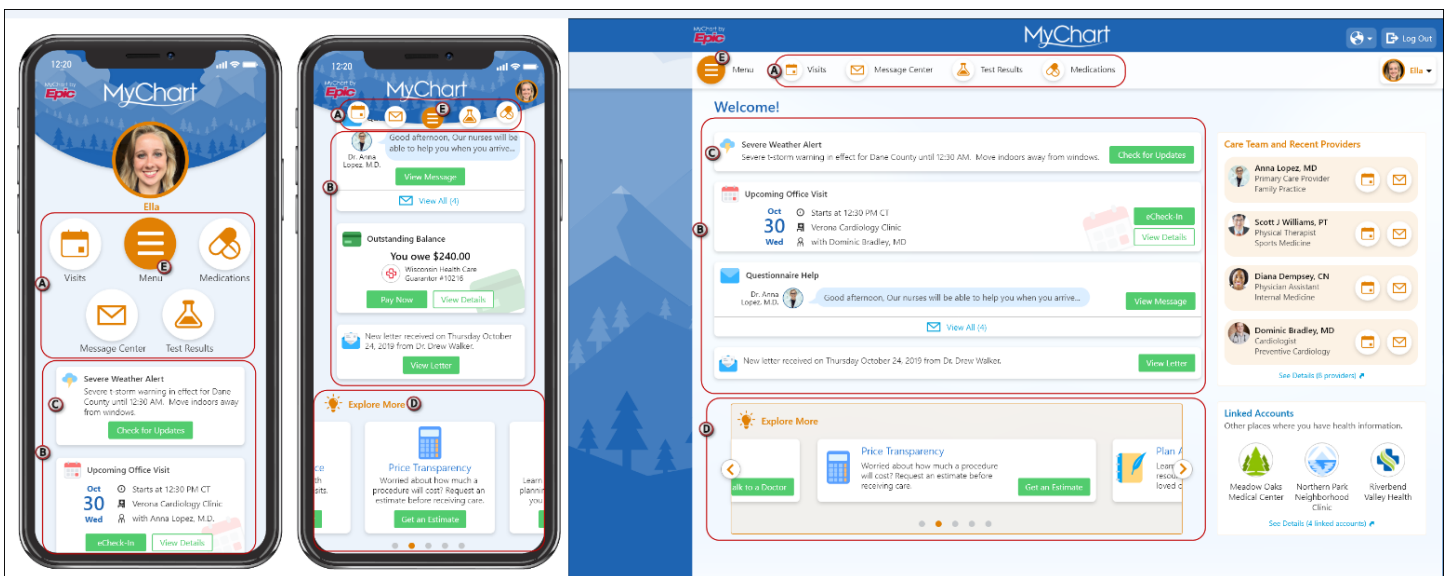
- Improved workflow
- More efficient

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.

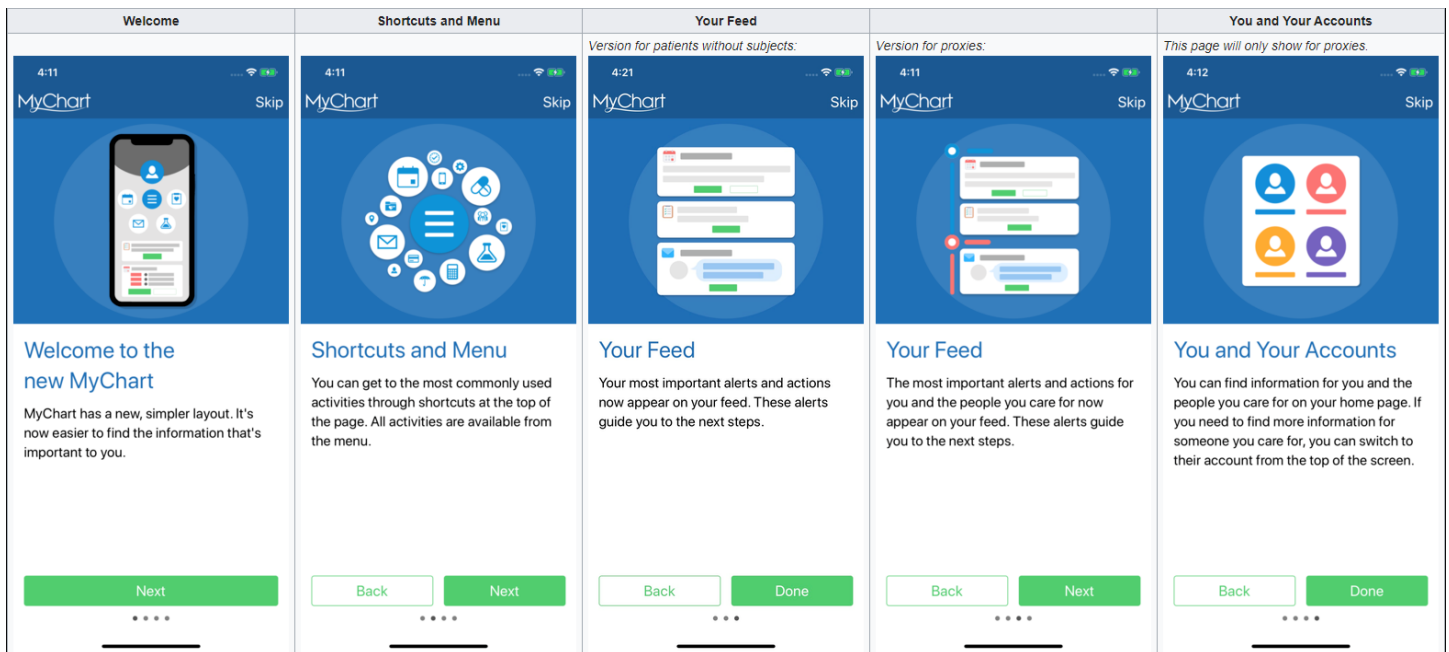


- Shortcuts on the homepage provide easy access to the four activities a patient uses the most.
- The **health feed** is a consolidated view of actionable health updates, including appointment reminders, check-in tasks and messages from the patient's care team.
- Information for proxies and patients for which they have proxy access appear in the same feed (color-coded by person). Proxies can select a patient from the **proxy menu** to go to that patient's chart.
- The **Explore More** section highlights specific functionality and directs patients to features in MyChart.
- The unified menu provides patients with access to every available activity, in addition to what's accessible through shortcuts or the health feed, and patients can search for menu items by name.

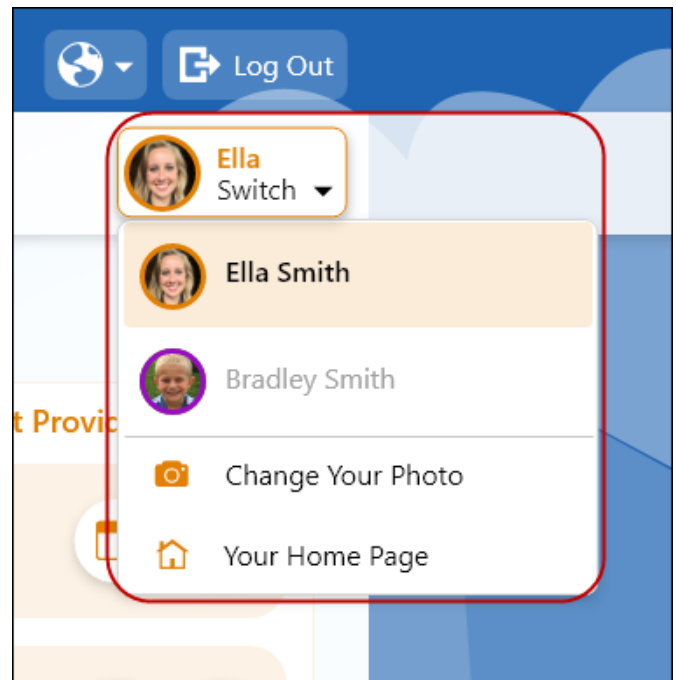


Single Billing Office Staff Feb. 21 Epic Update Companion

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 Desktop Login Page

Key Benefits:

- More accuracy and reliability

Description:

To provide a consistent, modern, and accessible experience to **MyChart** users, **Internet Explorer 11 (IE 11)** will no longer be supported. **MyChart** users' experience in accessibility, performance, and responsiveness has improved since we are moving towards the latest web standards.

By default, patients are redirected to an error page and instructed to download an alternative web browser when they navigate to the **MyChart** site from the **IE 11** web browser.

In-clinic features launched from Epic (such as questionnaires and **MyChart** signup) continue to work with **IE 11**, as does **Share Everywhere**.



