Feb. 21 Epic *Update Companion*

Transplant Coordinator

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:

- Transplant Coordinator

Top Changes for Role/Department:

1. [Redesign of Transplant Information Activity Tab](#)

2. [Monitor Transplant Recipient and Donor Progression Times with Improved Dashboard Component](#)

3. [Use Chart Search to Find Episode Checklist Tasks Quickly](#)

4. [Transplant Episodes are Visible in the Storyboard Hover Bubble](#)

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.
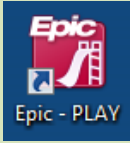
Guided Playground Practice
Exercises to help you prepare for the coming changes.

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: PHXRN00 thru PHXRN10
Playground Password: train

Key workflows for you to practice include:

- Log into Epic Playground and click Documentation in the main toolbar. Search for any James patient. Go to the Transplant Information activity tab and review the newly redesigned sections with less tabs and more on each tab, in sections. Close your James patient chart.
- Go to the HM Transplant Recipient Quality Dashboard by selecting the down arrow next to the TXP Coordinator Reporting Board Dashboard. Run and review the new Progression Times component for your James patient.
- Click Documentation in the main toolbar. Search for any Burak patient, enter a provider of Acdc, Blair in the pop up and click Accept. Hover over the Transplant cooler icon to see all episodes on Burak. Previously, you had to click on this icon to see the episodes.

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Activity and Workspace Updates

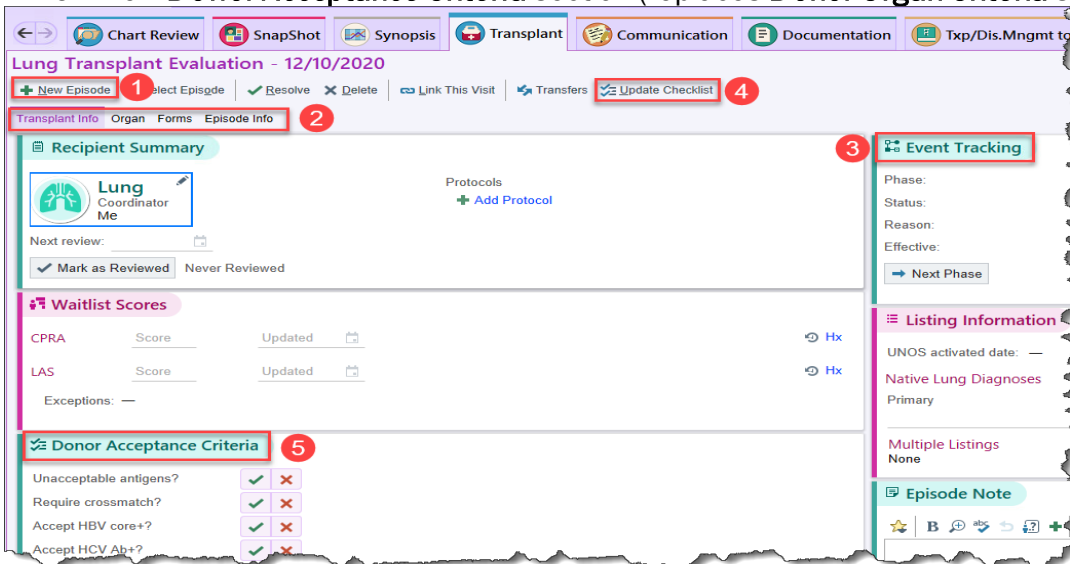**Key Change** — Redesign of Transplant Information Activity Tab

Key Benefits:
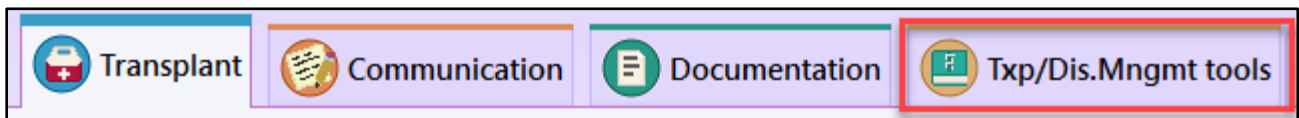- Improved workflow.
- More efficient.
- Time saver.

Description:
The redesigned **Transplant Information** activity is more efficient to navigate transplant episode documentation. The new format reveals fewer tabs, more radio buttons and the most crucial information for Transplant patients is conveniently listed on one page, within sections. Some of these changes include:

1. A **New Episode** quick button.
2. Separate tabs for forms, organ and episode information.
3. Easier event tracking section.
4. New **Update Checklist** toolbar button.
5. New **Donor Acceptance Criteria** section (replaces **Donor Organ Criteria** section).

- **Note:** The original **Transplant Information** activity tab was renamed **TXP/Dis.Mngmt**. You can still find the transplant scoring tools, VAD and disease management episodes.

Quickly Find Patient Status and Authorization Information in One Place on the Care Everywhere Status Activity

New Look

Key Benefits:
- Improved workflow.
- More efficient.
- Time saver.

Description:

The **Care Everywhere Status** activity now shows a patient's status and authorization information in one place, so that staff, such as Release of Information staff, can complete multiple tasks for the patient more quickly. You can see the patient's **Care Everywhere ID**, participation status and any organizations for which the patient has a link.

Care Everywhere Status

Care Everywhere Information   ⑦ Learn more about Care Everywhere

Care Everywhere ID

IDC-114-6590 ✎

Participation Status

[Participating | Not Participating]

☐ Always require authorization when Care Everywhere documents are requested.

Linked Outside Organizations

🔗 River Hills Health Care
🔗 Lakeland Valley Hospitals and Clinics

Care Everywhere

⊥ Authorization

Collect Prospective Authorization

Valid: Today until 06/10/2020 📅

Organizations: [Choose an organization/location 🔍] [➕ Add All] [✖ Remove All]

River Hills Health Care   ▤ ✖
Lakeland Valley Hospitals and Clinics   ▤ ✖

Authorizes: [Sending | Sending and Requesting]

Patient authorization is required to release clinical information to outside organizations. By clicking Mark as Collected, you certify that you have collected the patient's signature.

[📝 E-Sign Form] [🖨 Print Form] [✔ Mark as Collected]

☑ Also show non-current authorizations

Organizations	Effective	Expires	Authorization Type	Authorizes
River Hills Health Care	03/23/2020	03/24/2020	Signed at point of care.	—
Lakeland Valley Hospitals and Clinics	05/10/2020	06/10/2020	Prospective	Sending and Requesting 🗑

More Consistent Routing Options for Committee Review In Basket Messages

Key Benefits:
- Improved workflow.
- More efficient.
- Time saver.

Description:
When you edit a **Committee Review** note from an **In Basket** message, the buttons are consistent with other **In Basket** messages.

Dashboard Updates

Key Change	**Monitor Transplant Recipient and Donor Progression Times with Improved Dashboard Component**

Key Benefits:
- Improved workflow.
- More efficient.

Description:
The progression time component on your dashboard has more detailed information that you can use to closely monitor trends in your patients' throughput. Keep an eye on the component to spot slowdowns by organ program.

Median Progression Times

Last Refresh: 03:11:01 PM

Legend:
- ☑ Referral to Evaluation Days
- ☑ Referral to Committee Days
- ☑ Referral to Waitlist Days
- ☑ Evaluation to Committee Days
- ☑ Evaluation to Waitlist Days
- ☑ Committee to Waitlist Days
- ☑ Waitlist to Transplant Days
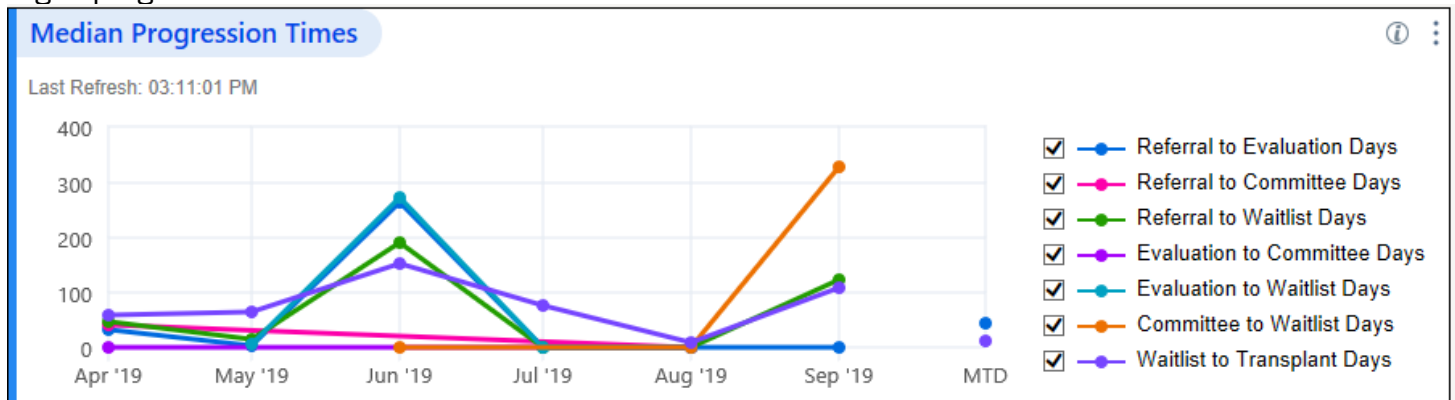
Episode Updates

Good to Know	Transplant Episodes are Visible in the Storyboard Hover Bubble

Key Benefits:
- Less clicks.
- More efficient.
- Time saver.

Description:
When the **cooler** icon is visible in the Storyboard, you can hover over it and see a list of transplant episodes. You no longer click the **cooler** icon to see the list of episodes.

Use Chart Search to Find Episode Checklist Tasks Quickly

Key Benefits:
- Less clicks.
- Time saver.

Description:

Use **Chart Search** to look up tasks by keyword instead of scrolling through the patient's checklist.

Epic's Hyperspace Updates

F1 Help Activity Name Changed

Good to Know
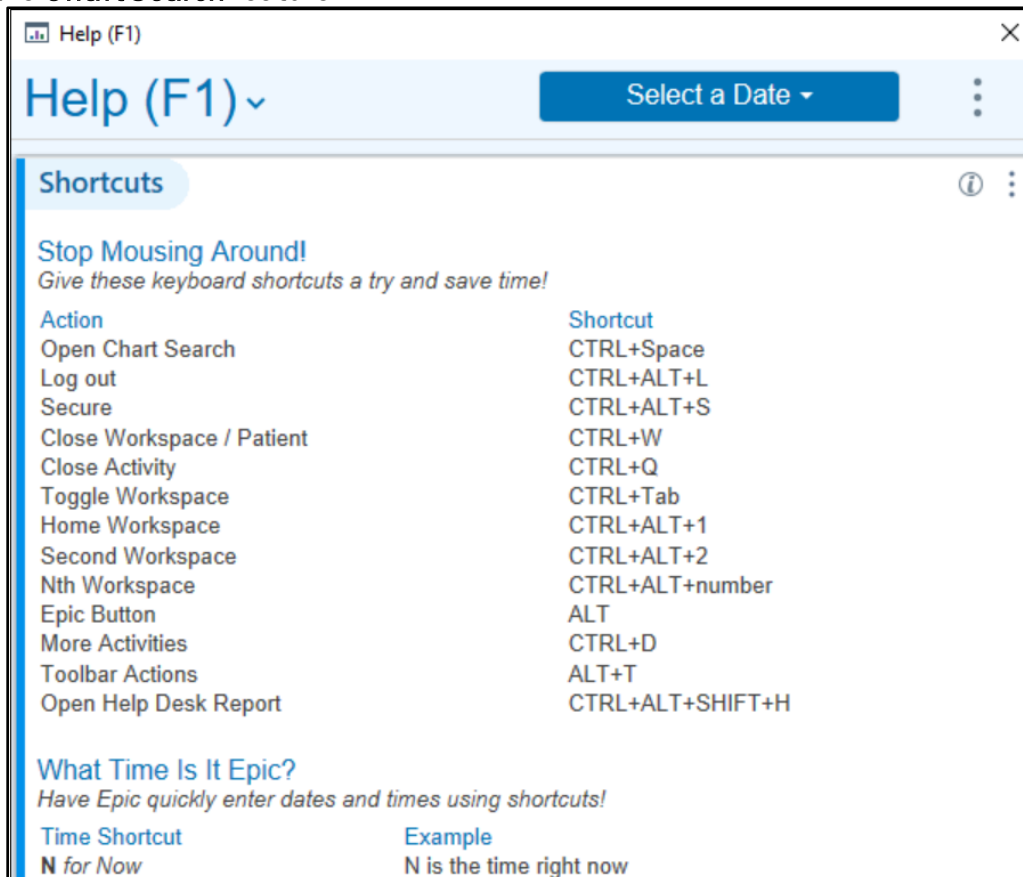
Key Benefits:
- More efficient.

Description:
The **F1 Help** activity name has changed to **Help (F1)** activity. This update puts emphasis on what you want when accessing the activity, and the name is more logical.

How to:
Access help through:
1. **Help (F1)** activity by pressing **F1** on your keyboard.
2. The **Epic** dropdown menu.
3. Using the **Chart Search** feature.

Storyboard Updates

Good to Know — **Patient Photo or Initials are More Obvious for a Deceased Patient**

Key Benefits:
- More efficient.
- Improved communication.

Description:
When you open an **In Basket** message or the chart for a deceased patient, the circle containing the patient's photo or initials is grayed out and surrounded by a black border. **Deceased** will also appear in bold text under the patient's photo or initials.

BMI Percentiles Appear in Storyboard for Pediatric Patients

New Feature

Key Benefits:
- More efficient.
- Improved communication.

Description:
The Transplant Storyboard will show BMI percentiles for patients younger than age 21.

BP: 120/80 (93.60%/ 97.42%),
Height: 5' (99.84%),
Weight: 90 lb (95.62%),
BMI: 17.58 kg/m^2 (74.92%)

UNOS Forms and Workbench Report Updates

New Look 🔍 Add, Review and Update Waitlist Scores from the Main Tab

Key Benefits:
- Improved workflow.
- More efficient.
- Time saver.

Description:

The **Waitlist Scores** section is now more easily accessible from the main tab. Only the scores relevant to your patient's transplant organ appear in this section. Historical scores are visible for adding, reviewing and updating right in the section.

Repopulate UNOS Thoracic Follow-Up Forms to Update Rounding in Pulmonary Function Tests

Key Benefits:
- Improved workflow.
- More accuracy and reliability.

Description:

Thoracic transplant coordinators or UNOS data coordinators must repopulate THF forms for post-transplant patients in the follow-up phase and for the current UNOS reporting period.