

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

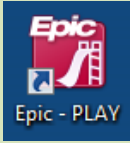
Top Changes for Role/Department:

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.



Activity and Workspace Updates



Redesign of Transplant Information Activity Tab

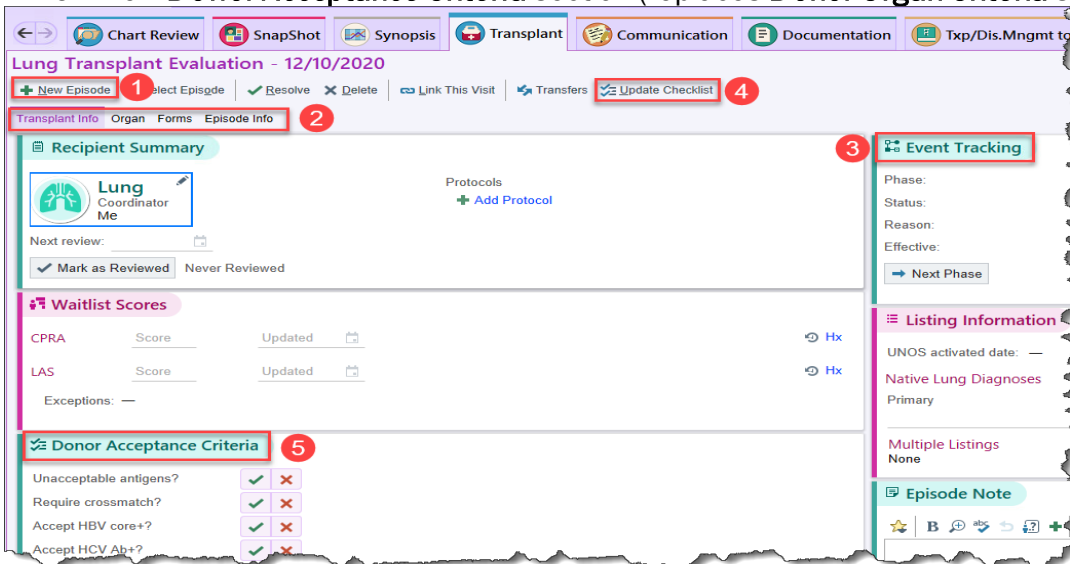
Key Benefits:

- Improved workflow.
- More efficient.
- Time saver.

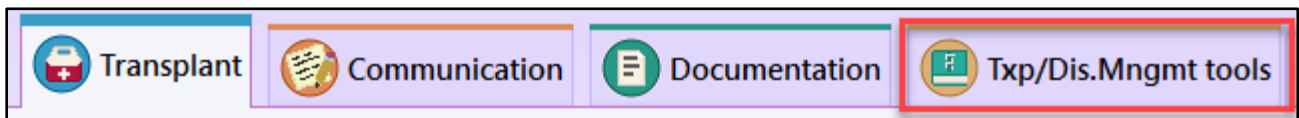
Description:

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

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.

The screenshot displays the 'Care Everywhere Status' interface. On the left, under 'Care Everywhere Information', the patient's ID is 'IDC-114-6590'. The participation status is 'Participating'. Below this, there is a checkbox for 'Always require authorization when Care Everywhere documents are requested' and a list of 'Linked Outside Organizations' including 'River Hills Health Care' and 'Lakeland Valley Hospitals and Clinics'. The 'Care Everywhere' logo is at the bottom left. On the right, the 'Authorization' section shows 'Collect Prospective Authorization' with a 'Valid' date of 'Today until 06/10/2020'. A list of organizations includes 'River Hills Health Care' and 'Lakeland Valley Hospitals and Clinics'. The 'Authorizes' section has buttons for 'Sending' and 'Sending and Requesting'. A yellow box contains a warning: '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.' Below this are buttons for 'E-Sign Form', 'Print Form', and 'Mark as Collected'. At the bottom right, there is a checkbox for 'Also show non-current authorizations'. A table at the bottom lists the authorization details:

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



New Look



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.

The screenshot displays the Epic In Basket interface for a message titled "Committee Review" sent to Venhuizen, Jamaal. The interface is divided into several sections:

- Message Header:** Includes a "Route as Committee Review" button (highlighted with a red box), "High/Low" priority buttons, and routing options: "My List", "Chair", "Coordinator", "Sender", and "Remove All".
- Edit Note:** A text editor with a "Committee Review" title and a "Summary: CR summary". The text content reads: "We reviewed this patient's documentation during the Liver team meeting today. We did not decide to accept this patient and waitlist them yet. Our decision is pending re-presentation at the next meeting." The text area is highlighted with a blue box.
- Message Actions:** A row of icons for actions like "Reply", "Print", "Share", "Sign", "Cancel", etc.
- Demographics:** Patient information including address (1060 West Addison, CHICAGO IL 60613), phone (555-555-5555), and email (devnull@epic.com).
- Recent Outpatient Visits:** A visit from 3 months ago at EMC Family Medicine for Cirrhosis, Physician Family Medicine, MD.
- Emergency Contacts:** Contact person Evore, Herb (Father) with home and work phone numbers.
- Care Team:** Includes Physician Internal Medicine, MD (PCP - General, Internal Medicine) and Social Worker Phoenix, LCSW (Social Worker, Transplant).
- Preferred Pharmacy:** EMC Prescription Pharmacy North, 123 Anywhere Street Verona WI 53593.
- Bottom Bar:** Action buttons "Pend", "Share", "Sign", and "Cancel" (highlighted with a red box).



Dashboard Updates



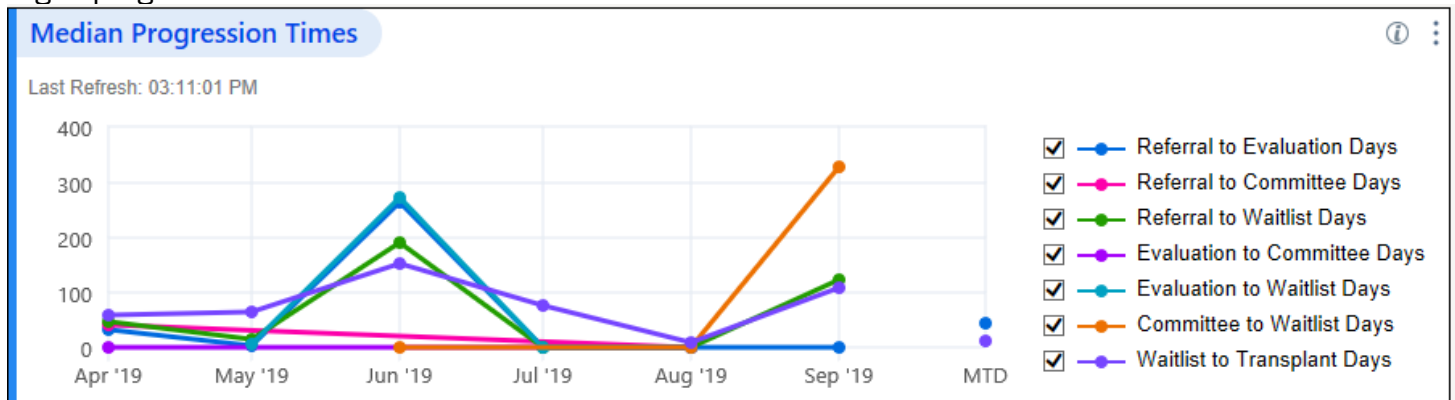
Monitor Transplant Recipient and Donor Progression Times with Improved Dashboard Component

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.



Episode Updates



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.

A screenshot of a patient's Epic storyboard hover bubble. The bubble is light blue and contains a patient profile card for Kathryn D. Kidney. The profile card includes a circular photo of the patient, a yellow sticky note, a teal sticky note with a stethoscope icon, and three circular icons: an envelope, a calendar, and a medical cross. Below the photo, the patient's name "Kathryn D. Kidney" is displayed in bold, followed by "Female, 52 y.o., 4/10/1966", "MRN: 202870", and "Code: FULL (has ACP docs)". A search bar with a magnifying glass icon and the word "Search" is below the profile information. At the bottom of the profile card, several fields are listed: "Isolation: None", "Kidney Coordinator: Me", "Coverage: None", "Allergies: No Known Allergies", and "Pharmacy: None". To the right of the profile card, a white hover bubble with a blue border is visible. It contains the text "All Transplant Episodes" in bold blue, followed by "Liver Transplant - 4/28/2019 (#1)" in blue, and "Status: Active Follow-up on 4/28/2019" and "Coordinator: Epic User" in black.





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.

The screenshot displays the Epic Chart Search interface. At the top, there is a navigation bar with tabs for Chart Review, Synopsis, History, Problem List, Demographics, Select Encounter, Place Amb Orders, Write Note, Send Letter, Call Patient, Refill Med, Create Encounter, and Search. Below the navigation bar, the search results for "safety" are shown. A search bar contains the text "safety". Below the search bar, there are tabs for All (1), Notes, Labs, Meds, Imaging, Procedures, Other Orders, Allergies, Immunizations, Media, Problems, Care Everywhere, and Episode Checklist Tasks (1). The main content area is divided into two sections. The left section, titled "This Week", shows a task: "Complete Home Safety Evaluation" with a due date of "9/6/2020". The right section, titled "Complete Home Safety Evaluation", shows the task details: "Episode Older Adult Program", "Responsible LINK TRANSPORTATION SERVICES POOL", and "Due: 9/6/2020". A globe icon is visible at the bottom of the right section, with the text "Select a result on the left to view the report." below it. A "Close" button is located in the bottom right corner of the interface.



Epic's Hyperspace Updates



F1 Help Activity Name Changed

Key Benefits:

- More efficient.

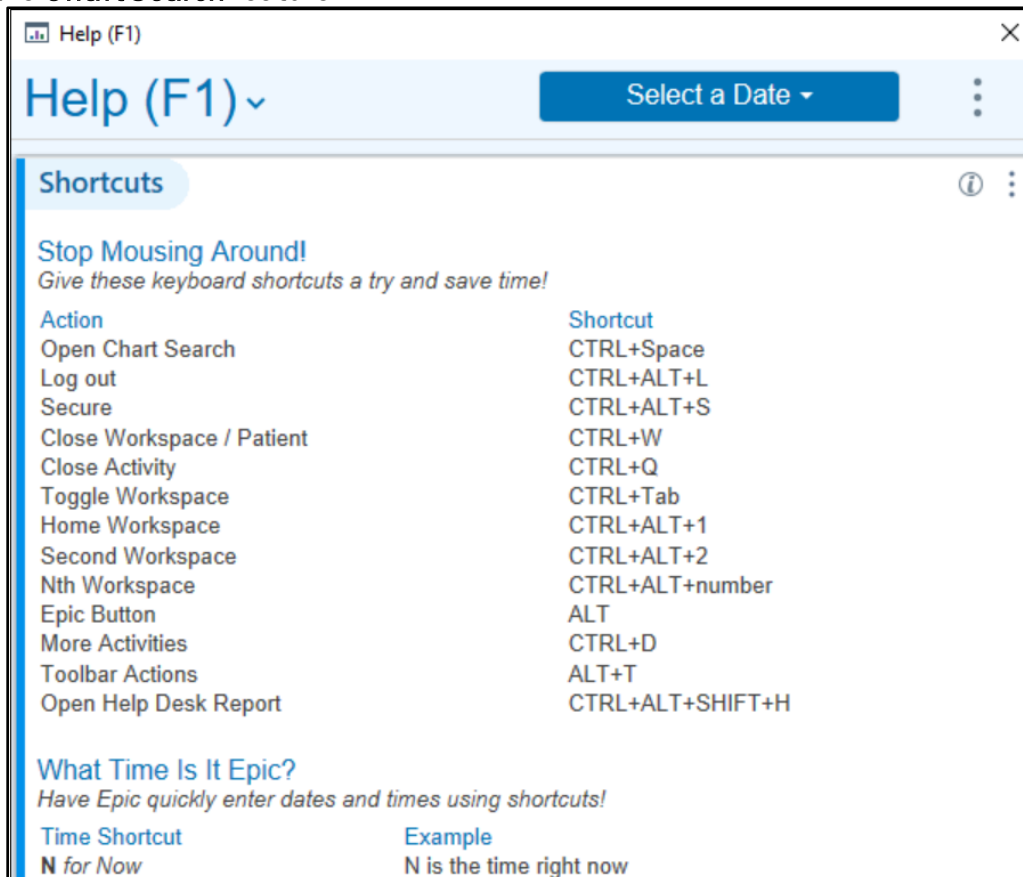
Description:

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



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

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/m² (74.92%)



UNOS Forms and Workbench Report Updates



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.

The screenshot shows a software interface titled "Waitlist Scores". At the top, it displays "CPRA 26" and "5/10/2020" with a refresh icon and "Hx". Below this is a "CPRA History" section with a "+ Add" button. A table lists three historical entries:

Score	Date	Action
75	5/10/2020	[Calendar icon] [X]
45	4/30/2020	[Calendar icon] [X]
25	4/1/2020	[Calendar icon] [X]

At the bottom right of the table area, there are "Accept" and "Cancel" buttons.





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.

