

Feb. 21 Epic *Update Companion*



Transplant 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:

- Dietician
- Financial Coordinator
- Intake Coordinator
- Manager
- Transplant Coordinator Assistant
- Transplant Outreach Coordinator
- VAD Tech 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](#)
5. [Repopulate UNOS Thoracic Follow-up forms to Update Rounding in Pulmonary Function Tests](#)



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 key change. Close your **James** patient chart.
- 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 this icon to see the episodes.
- Press **F1** on your keyboard to quickly go to the **Outpatient Clinical Support Learning Home** page for tip sheets. This is called the **F1 Help** activity.



Activity and Workspace Updates



Redesign of Transplant Information Activity Tab

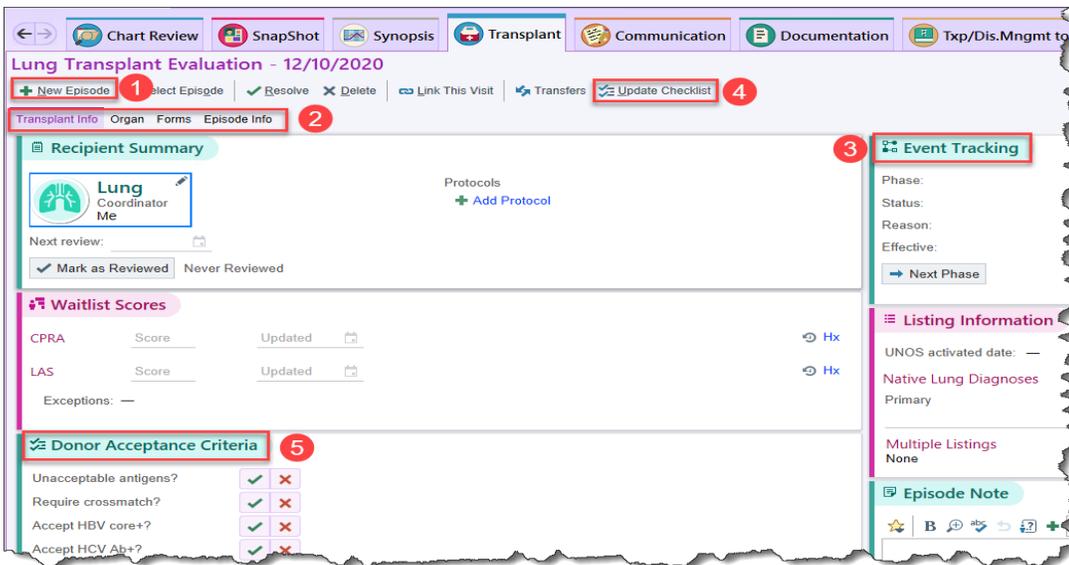
Key Benefits:

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

Description:

The redesigned **Transplant Information** activity is now more efficient to navigate transplant episode documentation. The new format has 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 are identified below:

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 has been 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.

Care Everywhere Status

Care Everywhere Information [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

Authorization

Collect Prospective Authorization

Valid: Today until 06/10/2020

Organizations: Choose an organization/location **+ Add All** **X Remove All**

River Hills Health Care **X**

Lakeland Valley Hospitals and Clinics **X**

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 X



Dashboard Updates



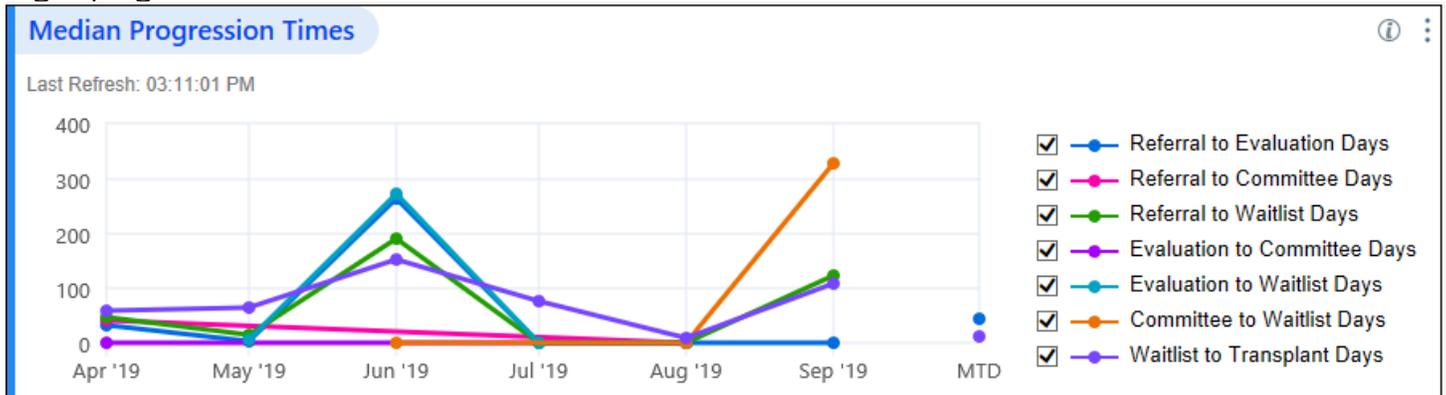
Monitor Transplant Recipient and Donor Progression Times with Improved Dashboard Component

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 Storyboard, you can hover over it and see a list of transplant episodes. You no longer must click the **cooler** icon to see the list of episodes.

A screenshot of a patient's Epic storyboard. On the left is a patient card for Kathryn D. Kidney, a 52-year-old female with MRN 202870. The card includes a search bar and various clinical details. On the right, a blue-bordered hover bubble is open, displaying a list of transplant episodes. The first episode is a liver transplant on 4/28/2019, with an active follow-up status and an Epic user as the coordinator.

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





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). A yellow banner indicates "Care Everywhere" with a note: "Additional results might be available if the patient has unretrieved Care Everywhere documents. You can find more outside information in the Care Everywhere Outside Records activity." Below this, a list of results is shown under the heading "This Week". One result is visible: "Complete Home Safety Evaluation" with a due date of "9/6/2020". A green box highlights the details for this task: "Complete Home Safety Evaluation" (Due: 9/6/2020), Episode "Older Adult Program", and Responsible "LINK TRANSPORTATION SERVICES POOL". At the bottom of the interface, there is a globe icon and the text "Select a result on the left to view the report." A "Close" button is located in the bottom right corner.





F1 Help Activity Name Changed

Key Benefits:

- More efficient.

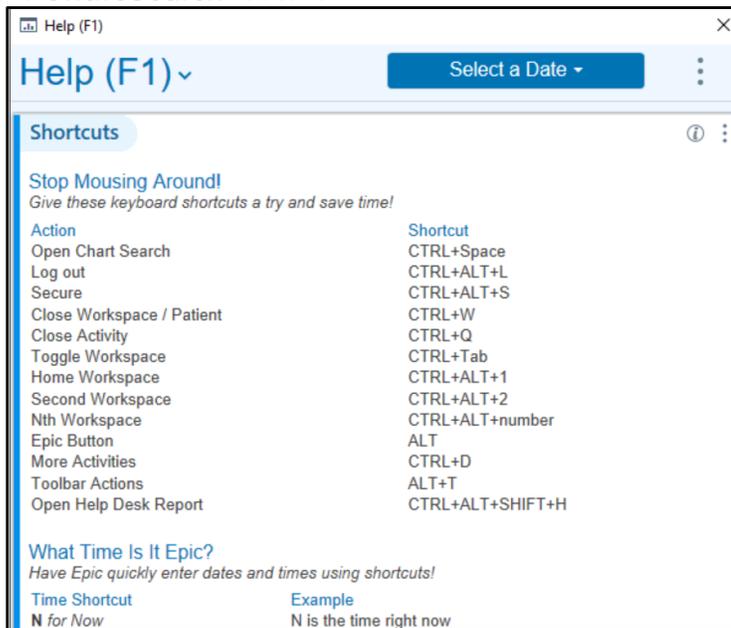
Description:

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 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 more easily accessible from the main tab. Now, 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 the "Waitlist Scores" section in Epic. At the top, it displays "CPRA" with a score of "26" and a date of "5/10/2020". Below this is a "CPRA History" table with three rows of historical data. Each row includes a score, a date, a calendar icon, and a close icon. At the bottom right of the table are "Accept" and "Cancel" buttons.

Score	Date	Calendar Icon	Close Icon
75	5/10/2020	📅	✕
45	4/30/2020	📅	✕
25	4/1/2020	📅	✕





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.

