

Feb. 21 Epic *Update Companion*



Health Information Management

Updated: 1/22/21

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:

- Deficiency Tracking Specialist

Top Changes for Role/Department:

1. [A New Look for Chart Central.](#)
2. [Only Relevant Suspension Areas Now Appear When Users Edit Statuses in Provider Workqueues.](#)
3. [Find and Reprint Saved Letters.](#)



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.

Deficiency Tracking Specialist



A New Look for Chart Central

Key Benefits:

Time Saver

Description:

Paper charts might not change, but it's time for the **Chart Central activity** to get a new look.

- A patient's charts now appear at the top of the activity. You can still find patient demographics in Storyboard.
- For easier access, the buttons at the bottom of the activity are now a toolbar at the top.
- Instead of reviewing deficiencies by episode, you can click the **All Deficiencies tab** in the toolbar and review all deficiencies for all patient visits. However, this feature is just for viewing. You will need to use the **Deficiency Tracking navigator** to manage deficiencies.
- Chart details appear in the bottom half of the screen, so you don't have to open a separate window.

The screenshot shows the Epic Chart Central interface for patient Gladys Larson. The top toolbar includes tabs for Open Episodes, All Charts, Open Releases, All Deficiencies, Account Info, All Episodes, All Releases, and Clinic Deficiencies. Below the toolbar is a table of chart episodes:

Chart ID	Chart Type	Active	Permanent Station	Current Station
26472001-MEDICAL-3	X-Ray	No	Eighth St. Medical Records	Eighth St. Medical Records
26472001-MEDICAL-2	Medical	No	Eighth St. Medical Records	Eighth St. Medical Records
26472001-MEDICAL-1	Medical	No	Eighth St. Medical Records	Eighth St. Medical Records

Below the table, patient details are displayed:

Chart ID:	26472001-MEDICAL-3	Patient:	Larson, Gladys [26472001]	DOB:	3/16/1945
Chart Type:	X-Ray [2]	Volume:	3	Active:	No [2]
Curr. Station:	EIGHTH ST. MEDICAL RECORDS [183]	Arrived:	Yes		
Perm. Station:	EIGHTH ST. MEDICAL RECORDS [183]	Status:	In		
Last Station:		Deficiency:	No		

A red notification at the bottom states: "The patient is currently in the WI HARBOR BLUFF unit and is in room NW Room 1".



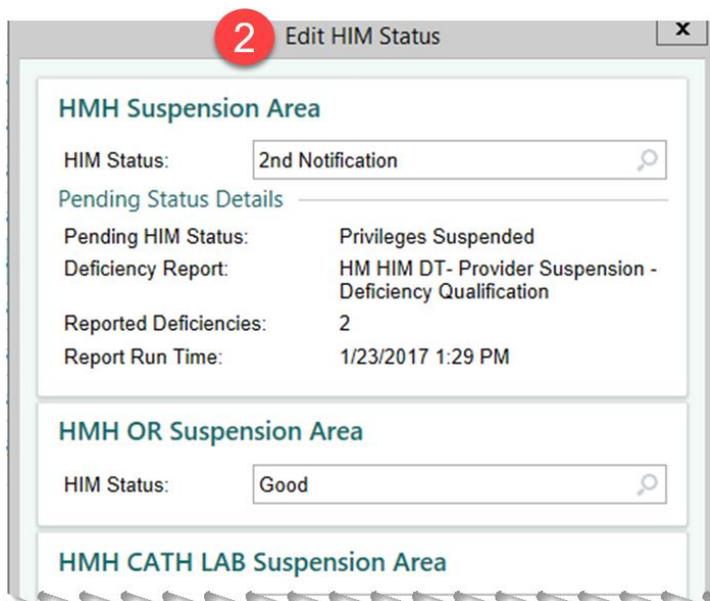
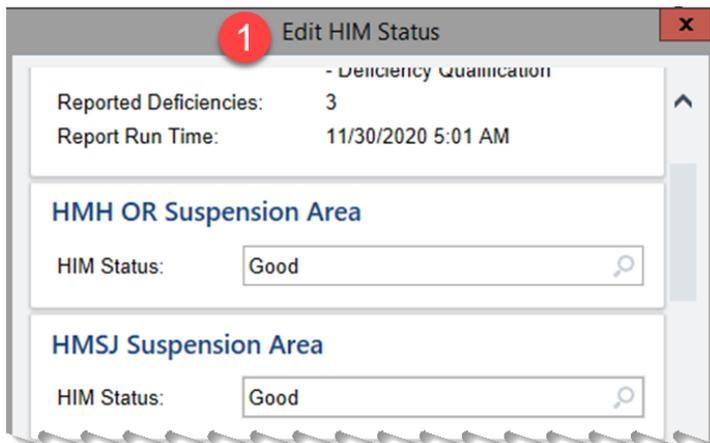


Only Relevant Suspension Areas Appear When Users Edit Statuses in Provider Workqueues

Key Benefits:
Time Saver

Description:

1. Prior to the update, when users update a provider's HIM status, they must scroll through the entire list of suspension areas.
2. With this update each workqueue will show only the suspension areas that relate to that workqueue.





Find and Reprint Saved Letters

Key Benefits:

Time Saver

Description:

Visual updates to the **Saved Letter Search** activity make it easier to find the letter you're looking for, review it and reprint it, if needed.

How To:

The preferred method to locate saved letters is to click on the **Saved Letter icon** in the toolbar when in one of the Provider workqueues.

You may also view saved letters by clicking on **Epic→HIM Tools→Saved Letter→Enter provider/patient information**.

When the **Saved Letter Search** screen appears, use filters to search and navigate to the desired letter.

The screenshot displays the 'Letter Search' interface. On the left, there are search filters for Deficiency, Letter Template (set to 'HMW HIM PROVIDER 1ST NOTIFICATION'), Author, Last Action, and date ranges. The main area shows a table with 4 results. The selected result is highlighted in green.

Patient	Context	Template	Author	Last Action	Date/Time
[Redacted]	Provider: Juan [Redacted]	HMW HIM PROVIDER 1ST NOTIFICATION	LEVY, ANA	Sent to In Basket	04/21/2017 0920
[Redacted]	Provider: [Redacted]	HMW HIM PROVIDER 1ST NOTIFICATION	LEVY, ANA	Saved	03/08/2017 1533
[Redacted]	Provider: [Redacted]	HMW HIM PROVIDER 1ST NOTIFICATION	LEVY, ANA	Sent to In Basket	03/08/2017 1344
[Redacted]	Provider: [Redacted]	HMW HIM PROVIDER 1ST NOTIFICATION	LEVY, ANA	Sent to In Basket	03/08/2017 1343

Results: 4 All results loaded

Letter Preview:

HOUSTON Methodist WEST HOSPITAL

4/21/17

Dear Juan [Redacted]

Our reports indicate you have incomplete medical records in EPIC that are currently delinquent or will become delinquent very soon. We are in the process of reinstating the suspension process for delinquent medical records per the Medical Staff Rules and Regulations. Please take this time to complete all incomplete and delinquent medical records as soon as possible. If you have completed your outstanding medical records since the date printed on this letter, please accept our appreciation and kindly disregard this notice.

Your incomplete and delinquent medical records will be found in your EPIC in-basket

Buttons: Print Letter, Edit Letter, Close





Get In Touch with the Letters Activity

Key Benefits:

Less Clicks

Description:

Letters appear in full in the **Letter activity**, making it easier for you to review the letter before printing or saving it.

EPIC SYSTEMS CORPORATION

TO:
Swanstrum Law
55 Maple Leaf Trail
Arvonnia, Virginia [47] 23004

___ Please be advised that the attached authorization does not meet all the requirements of Federal and State statutes. A proper authorization has been sent to the patient for signature.

___ Please be advised that Federal Privacy Regulations and WI Statutes 146.81, 146.82, and 146.83 regulate the confidentiality of and access to patient health care records.

___ Name of patient: Jacob Addison
___ DOB: 7/5/1992
___ Purpose of Disclosure: Legal

PLEASE RETURN THIS LETTER ALONG WITH THE INFORMATION AS REQUESTED ABOVE TO THE ATTENTION OF THE MEDICAL INFORMATION DEPARTMENT. THANK YOU!

Sincerely,
Joyce Elliot

Envelope Print Letter Save and Close Close



Good To Know



Hover to Discover New Demographics Information in Storyboard

Key Benefits:

Less Clicks

Description:

You now have easy access to more demographics information when you hover over a patient's name at the top of Storyboard in a clinical and HIM (1) or patient access (2) context.

- For these new items, if they're documented for the patient:
 - Patient Contacts
 - Time of Birth, until a baby is one month old
 - Written and Spoken Language (clinical and HIM only)
 - Unit (clinical and HIM only)
 - Race and Ethnicity (clinical and HIM only)

<p>Nusaybah Odeh (Legal) 1</p> <p>Pronouns: she/her/hers</p> <p>📅 26 yo, 2/17/1994 Gender identity: Female Legal sex: Female Sex assigned at birth: Female Marital status: Significant Other Ethnicity: African American</p> <p>🗣️ Preferred language: English</p> <p>🏢 Employer: Betty's Pastry Shop Occupation: Baker</p> <p>🆔 MRN: <383666></p> <p>👤 Patient Contacts Odeh, Alana (Mother) 608-555-1234 (Mobile)</p> <p>🏠 Unit: WI PRAIRIE BLUFF ED Bed: WI PB CRITICAL CARE 2 / PB CRITICAL CARE 2</p> <p>🏠 1979 Milky Way Drive Verona WI 53593</p> <p>☎️ 608-555-1979 (Home Phone) ★ 608-555-9791 (Work Phone)</p>	<p>Nusaybah Odeh (Legal) 2</p> <p>Pronouns: she/her/hers</p> <p>📅 26 yo, 2/17/1994 Gender identity: Female Legal sex: Female Marital status: Significant Other</p> <p>🏢 Employer: Betty's Pastry Shop Occupation: Baker</p> <p>🆔 SSN: xxx-xx-3521 MRN: <383666> CSN: 10002147367</p> <p>👤 Patient Contacts Odeh, Alana (Mother) 608-555-1234 (Mobile)</p> <p>🏠 1979 Milky Way Drive Verona WI 53593</p> <p>☎️ 608-555-1979 (Home Phone) ★ 608-555-9791 (Work Phone)</p>
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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.

Admitted - 4/30/2020 1001
Admitting provider: Hanna Pan, MD
Total duration of encounter: 11d
Admitted to inpatient: 4/30/2020 1241
Inpatient length of stay: 11d

Current Department - EEN ICU DEPT
Patient class: Inpatient
Time in unit: 11d





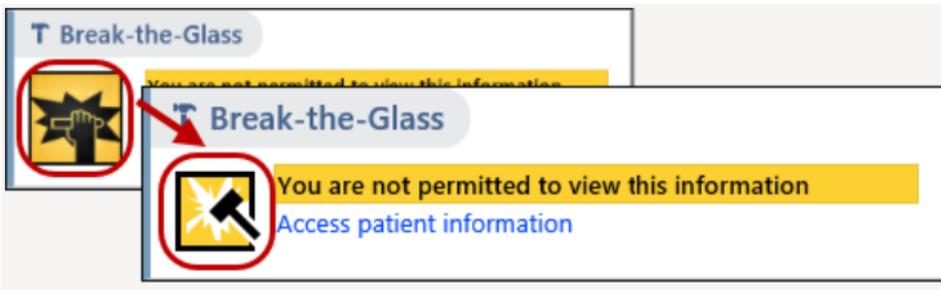
New Break-the-Glass Icon in Reports

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.





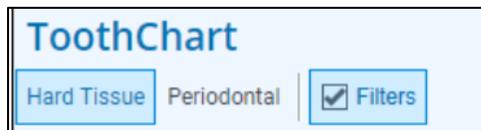
It's Easier to Tell When a Toolbar Button Is Selected

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.





It's Now More Obvious When You're Viewing Information for a Deceased Patient

Key Benefits:

Time Saver

Description:

When you open an In-Basket message or the chart for a deceased patient, the circle containing the photos or initials is now grayed out and surrounded by a black border.





Easier Printer Selection for Workstations on the Go

Key Benefits:

Time Saver

Description:

Users on the move can now pick the closest printer. With **Virtual Local Printing**, once a user selects a printer for a workstation and output type, the system remembers that printer as the default, so the user is not asked to choose a printer. Users with mobile workstations did not previously have a way to choose a different printer unless they reprinted documents to update their printer selection.

Note: HIM Management does not currently recommend this setting.

How To:

If a user enables the new printing preference setting (1), when they print from that workstation in the future, they are prompted to select a printer based on the output type (2).

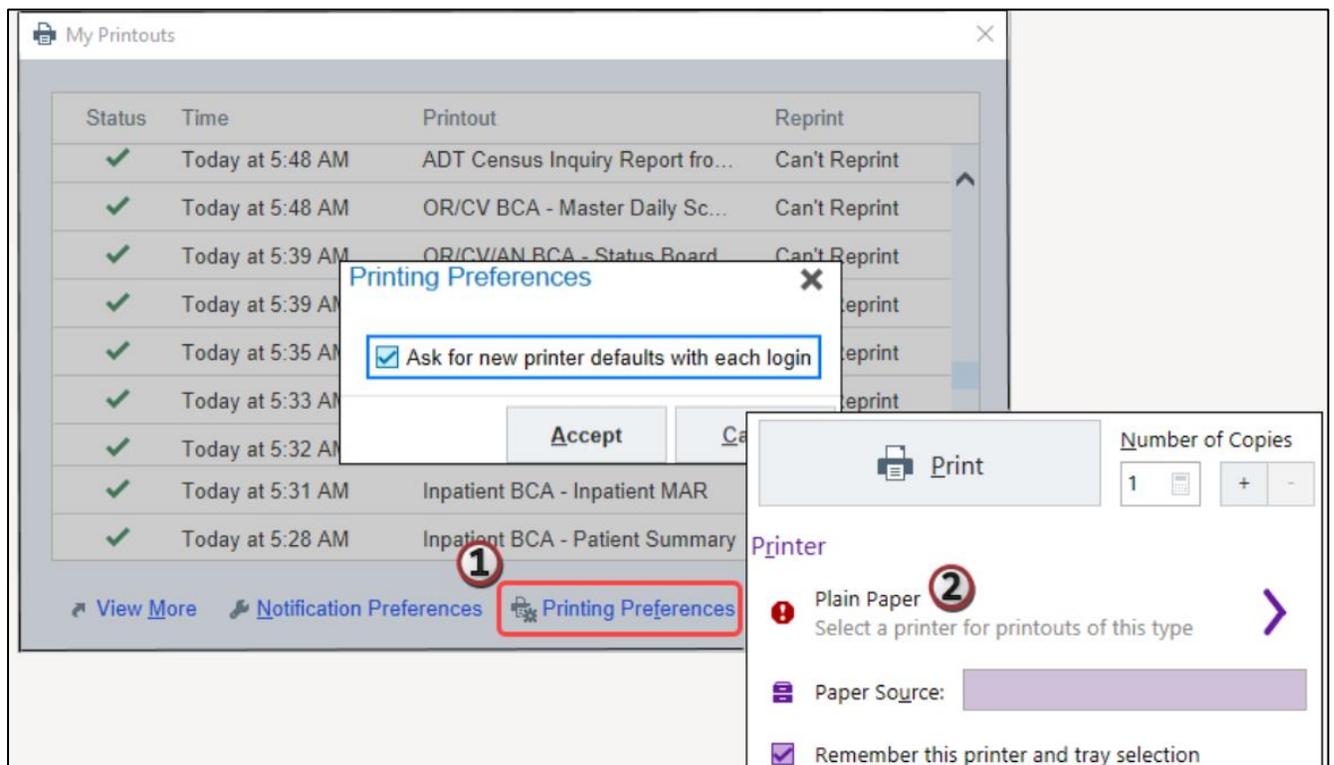




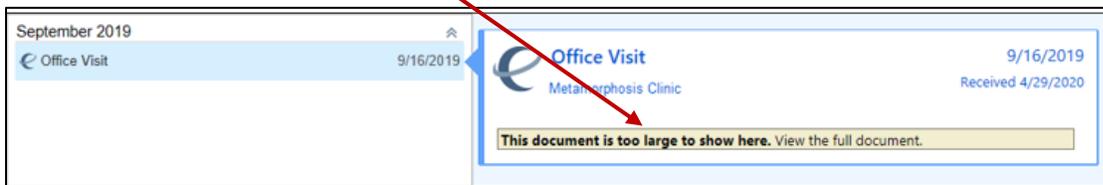
Chart Search Results Load More Quickly for External Documents–736212

Key Benefits:

Time Saver

Description:

To reduce the time it takes to preview very large Care Everywhere documents in **Chart Search** results, if the document exceeds 250 lines, you now see a link in the **Chart Search hover bubble** to open the full document rather than a preview.





Hover over the Cooler Icon in Storyboard to See Transplant Episodes

Key Benefits:
Time Saver

Description:
You don't have to click the **cooler icon** in Storyboard to see a list of your patient's transplant episodes anymore. Just hover to see the list.

The screenshot shows a patient's Epic Storyboard for Kathryn D. Kidney. The patient's profile card is on the left, and a tooltip is displayed on the right. The tooltip is titled "All Transplant Episodes" and lists a "Liver Transplant - 4/28/2019 (#1)" with a status of "Active Follow-up on 4/28/2019" and a coordinator of "Epic User".

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

