

Feb. 21 Epic *Update Companion*

Health Information Management

Updated: 1/29/21

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:

- Coders
- CDI Specialist
- ED Charge Reviewers

Top Changes for Role/Department:

1. [Hospital Account Searches with Multi-Selectable Accounts and Copy-Paste.](#)
2. [Complete Your Account Activity Before Starting a New One.](#)
3. [Line Linking Gets a New Look.](#)
4. [Fix Errors Faster with the Redesigned Claim Edit Assistant.](#)



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.

Coders, CDI Specialists & ED Charge Reviewers



Hospital Account Searches Are Looking Up with Multi-Selectable Accounts and Copy-Paste

Key Benefits:

- More Efficient

Description:

The Hospital Account Lookup activity has a completely new look, whether you are looking up one account or multiple accounts.

Looking up accounts in Hospital Billing has been reimagined.

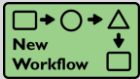
- Users can now access the **Hospital Account Lookup** activity (search: Hospital Account) to easily apply filters to searches, and to select multiple accounts in the **Search Results** tab. Users can then review the accounts in the **Selected Accounts** tab.
- The new activity also supports copy-and-paste for multiple HAR IDs. A user can work with HAR IDs in a spreadsheet and copy and paste a list of IDs right into the search field. All the HARs that the user selected in the spreadsheet are automatically selected in the **Search Results** tab.
- A date range filter and an account status filter (for account statuses Open, Billed, Closed, Combined, and Voided) have been added to help users refine search results while looking up HARs.
- Below is the Coder's view when doing an account lookup from **Coding Info** or **Hospital Account**. A similar view is available to CDI Specialists and ED Charge Reviewers. Coders have the additional ability to filter by HB [Hospital Billing] or PB [Professional Billing] **Account Type** filter.
- Once the user marks the boxes as indicated below, the settings will default.

Note: When doing an account look up and you are unable to see the account, make sure the **Account Status** boxes are marked correctly.

The screenshot shows the 'Hospital Account Lookup' window. At the top, there are tabs for 'Account', 'Patient', 'Guarantor', 'Invoice #', and 'Tx Ref #'. The 'Account' tab is selected, and the search field contains 'taylor'. Below the search field, there are filters for 'Date Range' (3/25/2020 to 9/24/2020) and 'Account Status' (Open, DNB, Billed, Closed, Combined, Voided). A 'Account Type' filter is highlighted with a red box, showing 'HB' and 'PB' checked, and 'Default' unchecked. Below the filters, there is a 'Selected Accounts (4)' section with a 'Search Results' tab. The search results table shows 17 records loaded. The table has columns for ID, Patient Name, Type, Guar Type, Location, Class, Status, Primary Payer, Adm Date, Dis Date, and Balance. The first three rows are visible:

ID	Patient Name	Type	Guar Type	Location	Class	Status	Primary Payer	Adm Date	Dis Date	Balance
400001590	TAYLOR,APPLE	P/F	WI HARBOR BLUFF...	Inpatient	OPEN	Self-pay	06/25/2020		0.00	
61402	TAYLOR,CHRIS	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	WI HOME HEALTH S...	HH Alternate...	OPEN	Self-pay	09/01/2020		0.00	





Complete Your Account Activity Before Starting a New One

Key Benefits:

- Improved Workflow

Description:

When you open an account activity in **Account Maintenance**, an account workqueue, or a claim edit workqueue, the **Account Activity** button is unavailable until you accept or cancel the activity in the sidebar.

The screenshot displays the Epic EMR interface. The main window shows a list of account activities under the 'Acct Summary' tab. The sidebar on the right contains several sections: 'Add Note', 'Update Billing Indicators', and 'Perform Workqueue Action'. The 'Perform Workqueue Action' section has 'Accept' and 'Cancel' buttons. A red arrow points from the 'Account Activities' button in the main window to the 'Accept' button in the sidebar.

Workqueue	Primary User	Status	Added On
HM LAB CREATED ENCOUNTER [3161]	—	ReEntry	09/09/2015
INACTIVE AUTH/CERT ADMISSIONS AND DIS...	—	ReEntry	09/09/2015
HMH MISSING SIGNED DOCUMENTS [1331]	—	ReEntry	05/13/2015
HM INHOUSE PATIENTS WITH HIGH DOLLAR...	—	ReEntry	03/22/2015





Line Linking Gets a New Look

Key Benefits:

- Time Saver

Description:

Linking one or multiple lines to an order now happens on a single window. Add or remove lines for an order using new buttons within each order.

Note: You should not **UNLINK** a line for a medication that has been given.

Link Lines

DOPamine infusion 800 mcg/mL Start 03/18/20 1135

Link at: 03/25/2020 8:43 AM

Line: Double Lumen PICC Right subclavian Peripheral IV 03/05/20 1314 R arm Central IV

Port: Media Distal Proximal

Enter a comment

Unlink New Line

Dextrose 5 % solution Start 02/20/20 1320

Link at: 03/25/2020 8:43 AM

Line: Double Lumen PICC Right subclavian Peripheral IV 03/05/20 1314 R arm Central IV

Enter a comment

New Line

dextrose 5 % and 0.2 % NaCl infusion Start 01/29/20 1545

Link at: 03/25/2020 8:43 AM

Line: Double Lumen PICC Right subclavian Peripheral IV 03/05/20 1314 R arm Central IV

Enter a comment

Unlink New Line

Line Report

Accept Cancel





Account Workqueues Get a Fresh New Look and Improved Filters

Key Benefits:

- Time Saver

Description:

We've refreshed account workqueues with an improved visual interface and better filtering tools to help users more easily find the accounts they need.

When users create or edit account workqueue filters, they now see a tab for **Simple mode**, in addition to the **Advanced mode** that previously existed in workqueues. The **Advanced mode** relies on rules, which could be cumbersome for the everyday user

How To:

1. In the **Simple mode**, select **Set/Edit Filter** to create or edit workqueue filters.
2. The new workqueue information sections help users understand how an account arrived in the workqueue and to review and easily open other workqueues where the account appears

The screenshot shows the 'Set/Edit Filter' button highlighted with a red circle and a red arrow pointing to it. The 'Simple' mode tab is also highlighted with a red circle. The interface includes a table of accounts and a 'Criteria' section with filters for Guarantor Acct, Acct Financial Class, Oldest Service Date, and Last SP Pmt Date.

Ac D	Account	Acct Class	Acct Status	Account Name	Disch Date	ALL DEFIC COMPT	Acct Bal	Message
	25133	Inpatient	Discharged/Not...	HAHN, GINEVRA	11/23/2018	No	1,039.64	Qualified
	25304	Inpatient	Discharged/Not...	HAHN, HERMIONE	03/08/2019	No	1,039.64	Qualified

Workqueue Info	
Entered on 11/23/2018	
Rule MKO RULE	Error Message Account not coded

Other Workqueues			
Workqueue	Primary User	Status	Added On
ABSTRACTING NOT COMPLETE [5084]	—	Active	11/23/2018
HIM QA VS DEFICIENCIES PREVENT CODING [5085]	—	Active	11/23/2018
HIM QA VS VICTORIA SQUARE ACCOUNTS [5469]	—	Active	11/23/2018
HIM QA VS CDI HARS [5496]	—	Active	11/23/2018
LLH DOC QUERIES NONE OUTSTANDING [5528]	—	Active	11/23/2018



Quality Review and Revenue Integrity Team



Fix Errors Faster with the Redesigned Claim Edit Assistant

Key Benefits:

- Time Saver

Description:

Quality Review and Revenue Integrity Team - The **Claim Edit Assistant** has a completely new layout, designed to put the information you need right at your fingertips. Use the new sidebar to view claim information and errors side-by-side and make edits more quickly.

The screenshot displays the Epic Claim Edit Assistant interface. The main area shows a claim summary for Archibald Flint, including patient information, invoice details (101280800), and a total charge of 356.50. The 'Recent History' section shows a timeline of actions like 'Added to workflow' and 'Error added'. On the right, a sidebar titled 'Claim Errors' lists five active errors, with the first one, 'Insurance ID Format is Not Valid', highlighted in red. The sidebar also includes options to 'Override' errors and 'Edit Claim Values'.



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.

- Look for these new items, if they're documented for the patient:
 - Patient Contact
 - 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> <div> <div> <p>26 yo, 2/17/1994</p> <p>Gender identity: Female</p> <p>Legal sex: Female</p> <p>Sex assigned at birth: Female</p> <p>Marital status: Significant Other</p> <p>Ethnicity: African American</p> </div> <div> <p>Preferred language: English</p> <p>Employer: Betty's Pastry Shop</p> <p>Occupation: Baker</p> <p>MRN: <383666></p> </div> </div> <div> <p>Patient Contacts</p> <p>Odeh, Alana (Mother)</p> <p>608-555-1234 (Mobile)</p> <p>Unit: WI PRAIRIE BLUFF ED</p> <p>Bed: WI PB CRITICAL CARE 2 / PB CRITICAL CARE 2</p> <p>1979 Milky Way Drive</p> <p>Verona WI 53593</p> <p>608-555-1979 (Home Phone) ★</p> <p>608-555-9791 (Work Phone)</p> </div>	<p>Nusaybah Odeh (Legal) 2</p> <p>Pronouns: she/her/hers</p> <div> <div> <p>26 yo, 2/17/1994</p> <p>Gender identity: Female</p> <p>Legal sex: Female</p> <p>Marital status: Significant Other</p> </div> <div> <p>Employer: Betty's Pastry Shop</p> <p>Occupation: Baker</p> <p>SSN: xxx-xx-3521</p> <p>MRN: <383666></p> <p>CSN: 10002147367</p> </div> </div> <div> <p>Patient Contacts</p> <p>Odeh, Alana (Mother)</p> <p>608-555-1234 (Mobile)</p> <p>1979 Milky Way Drive</p> <p>Verona WI 53593</p> <p>608-555-1979 (Home Phone) ★</p> <p>608-555-9791 (Work Phone)</p> </div>
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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





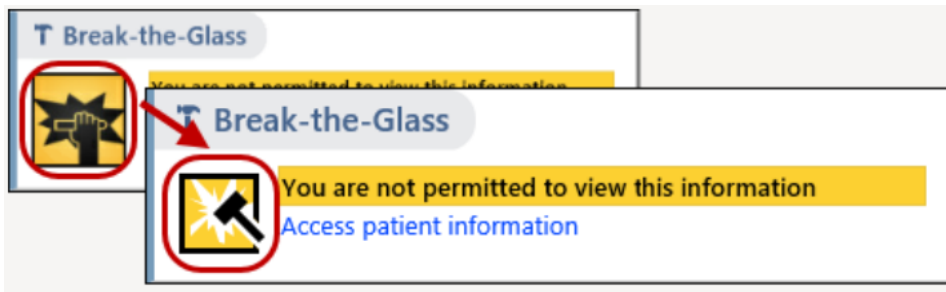
New Break-the-Glass Icon in Reports

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.





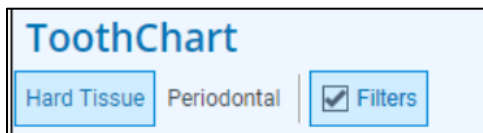
It's Easier to Tell When a Toolbar Button Is Selected

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 patient's 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).

The screenshot displays the 'My Printouts' window in Epic. It contains a table with columns: Status, Time, Printout, and Reprint. The table lists several printouts, all with a status of '✓' and a 'Can't Reprint' status. A 'Printing Preferences' dialog box is overlaid on the table, showing a checkbox labeled 'Ask for new printer defaults with each login' which is checked. This checkbox is circled with a red '1'. Below the dialog box, the 'Printing Preferences' link is also circled with a red '1'. To the right of the dialog box, a 'Print' dialog box is shown. It has a 'Printer' section where 'Plain Paper' is selected and circled with a red '2'. The 'Print' dialog box also shows 'Number of Copies' set to 1 and a 'Remember this printer and tray selection' checkbox.

Status	Time	Printout	Reprint
✓	Today at 5:48 AM	ADT Census Inquiry Report fro...	Can't Reprint
✓	Today at 5:48 AM	OR/CV BCA - Master Daily Sc...	Can't Reprint
✓	Today at 5:39 AM	OR/CV/AN BCA - Status Board	Can't Reprint
✓	Today at 5:39 AM		reprint
✓	Today at 5:35 AM		reprint
✓	Today at 5:33 AM		reprint
✓	Today at 5:32 AM		reprint
✓	Today at 5:31 AM	Inpatient BCA - Inpatient MAR	
✓	Today at 5:28 AM	Inpatient BCA - Patient Summary	

Buttons: View More, Notification Preferences, Printing Preferences (circled with 1), Accept, Cancel

Print Dialog Box:

- Printer: Plain Paper (circled with 2)
- Number of Copies: 1
- Remember this printer and tray selection: ☒





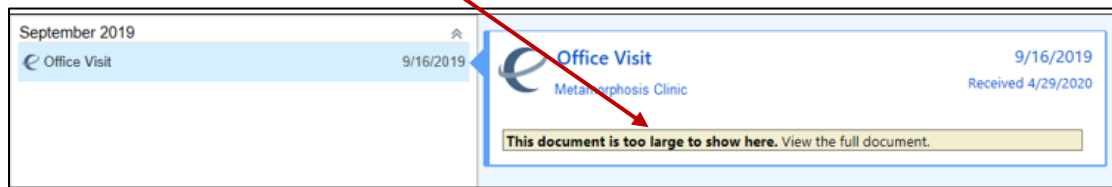
Chart Search Results Load More Quickly for External Documents

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 displays a patient's Epic Storyboard for Kathryn D. Kidney. The patient's profile card on the left includes her name, gender, age, date of birth, MRN, and code. Below this is a search bar and a list of clinical details. A tooltip is shown on the right, triggered by hovering over the cooler icon, displaying 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

