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](#).

Coders, CDI Specialists & ED Charge Reviewers

Key Change

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.

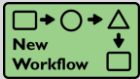Looking up accounts in Hospital Billing has been reimagined.

- 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.

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.

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.

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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

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.

Good To Know

New Look 🔍	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)

Good to Know   ## 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
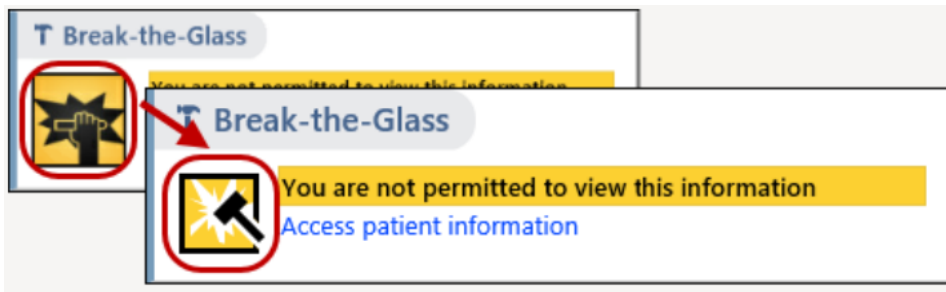Patient class: Inpatient
Time in unit: 11d

New Look 🔍 **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.
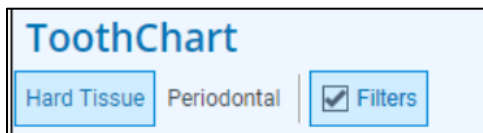
It's Easier to Tell When a Toolbar Button Is Selected

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.

New Look	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.

New Feature ✸   ## 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).
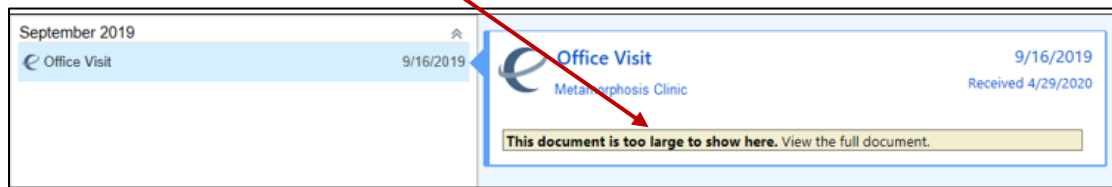
New Look 🔍	**Chart Search Results Load More Quickly for External Documents**

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.