

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:

- Release of Information Specialist

Top Changes for Role/Department:

1. [A New Look for Chart Central.](#)
2. [Find and Reprint Saved Letters.](#)
3. [View Details About Which Records Were Excluded from a Release.](#)
4. [Quickly Find the Information You Need in the Care Everywhere Status Activity.](#)



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.

ROI 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.
- To evaluate whether records are complete or whether deficiencies might impact releasing the medical records or its parts, click on **All Deficiencies** in the toolbar. The screen will show all deficiencies for all patient visits.
- Chart details appear in the bottom half of the screen, so you don't have to open a separate window.

The screenshot displays the Epic Chart Central interface for a patient named Gladys Larson. The top navigation bar includes tabs for Appt Desk, Identity Manager, Chart Review, Patient Station, FYI, Patient Charts Report, Patient Disclosure Report, Document List, and Phone Book. Below this, a secondary toolbar contains buttons for Open Episodes, All Charts, Open Releases, All Deficiencies (highlighted with a red arrow), Account Info, All Episodes, All Releases, and Clinic Deficiencies. The main content area features a table of chart entries:

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, a detailed view for the selected chart (26472001-MEDICAL-3) is shown, including patient information and a note: "The patient is currently in the WI HARBOR BLUFF unit and is in room NW Room 1".





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 within the ROI Navigator.

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

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

The screenshot displays the 'Saved Letter Search' window. On the left, there are search filters: 'Release' (KELLENBURGER, MONICA [1...]), 'Letter Template', 'Author', 'Last Action', 'From Date', and 'To Date'. Below these are 'Search' and 'Clear' buttons. The main area shows a table with one result:

Patient	Context	Template	Author	Last Action	Date/Time
Kellenburger, Monica	Release: Monica Kellenburger [1544] Requester: SWANSTRUM LAW	ROI AUTHORIZATION LETTER	ELLIOT, JOYCE	Saved	08/05/2020 1100

Below the table, the preview of the letter is shown. The letter is from EPIC SYSTEMS CORPORATION (5301 Tokay Boulevard, Madison, WI 53711) dated 8/5/20, addressed to Swanstrum Law (55 Maple Leaf Trail, Arvon, VA 23004). The letter content includes a request for health records and a notice that the request is being denied due to an invalid or incomplete authorization.





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 more content 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





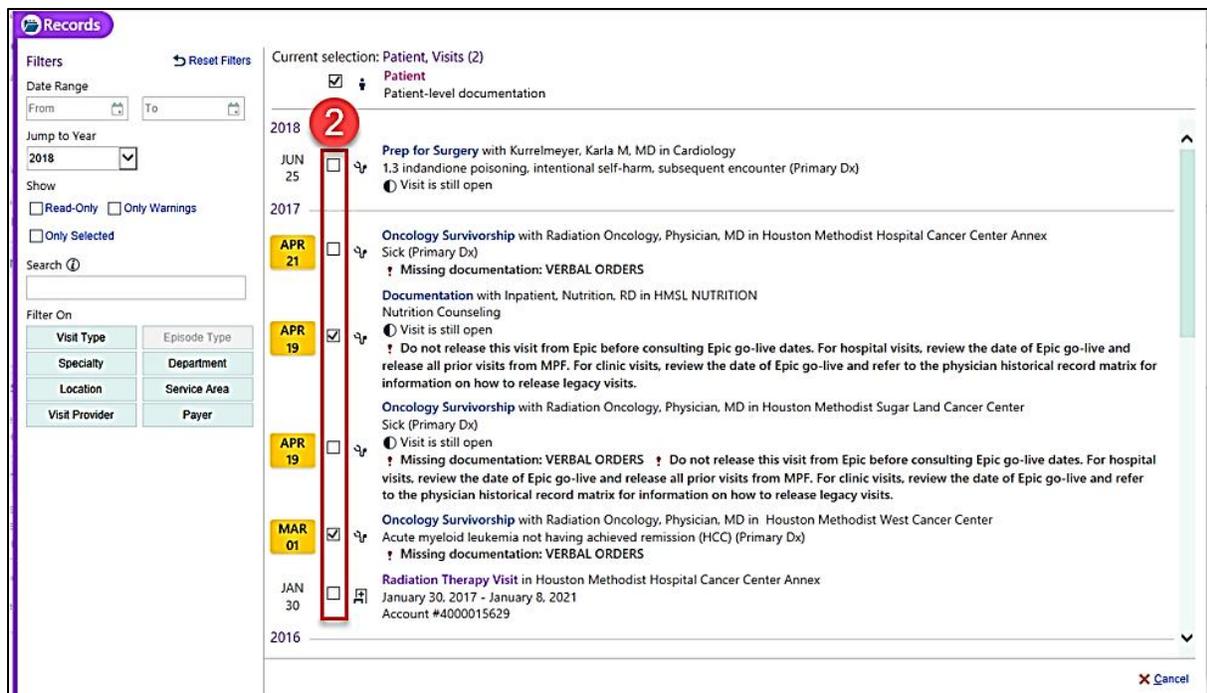
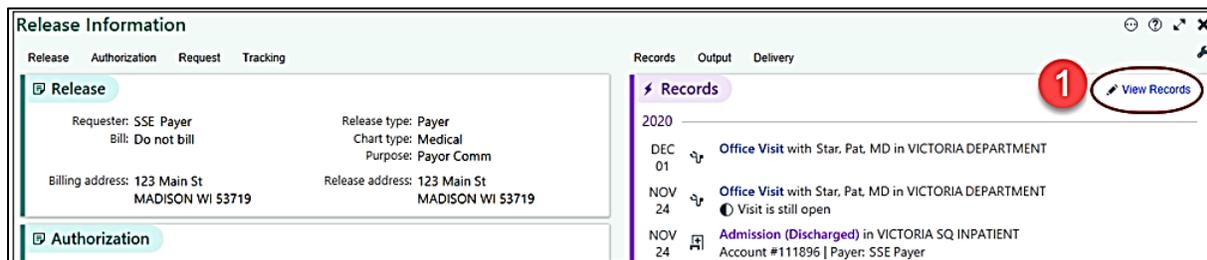
View Details About Which Records Were Excluded from a Release

Key Benefits:

- Less Clicks

Description:

1. Release of Information Specialists can now **View Records** in a fulfilled release to see any visit records not included in the release, in addition to the included records they see in the **Records Activity**.
2. Visits which were included contain a **check mark**.
3. Changing the selection of visits to include or exclude in the release is not available in this feature. The user should start a new release when initiating a new disclosure with a different set of records. Edit release is also available and can be used in appropriate circumstances.





Quickly Find the Information You Need in the Care Everywhere Status Activity

Key Benefits:

- Time Saver

Description:

- A patient's participation status and authorization information now appear in one view in the **Care Everywhere Status** activity, making it easy to find the information you need.
- To help you answer questions from the patient or from staff at other organizations, the activity now shows why a patient is not participating in Care Everywhere and if they opted out and the date they opted out.

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





Quick Disclosures Are Even Faster with an Updated Activity

Key Benefits:

- Time Saver

Description:

- **Quick Disclosure** now opens in a window, rather than an activity tab.
- The **Disclosed by** and **Date** fields have moved to the bottom of the window because they don't often need to be changed.

Quick Disclosure

Recipient

Third party Patient Relation Provider

59 PAIN & REHABILITATION CENTER

Address: 7443 SOUTHWEST FREEWAY HOUSTON TX 77074

Phone: 7134846262 Fax: 7134846363

Purpose

Continuity of Care

Info Released

+ Add ✓ Progress Notes

✓ Authorization Received

Hide Comment

Comment

Disclosed by: VAN GORDER, DAV... Date: 1/12/2021

Accept Cancel



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> <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.





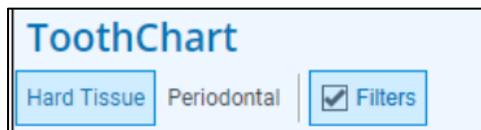
It's Easier to Tell When a Toolbar Button Is Selected

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 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).

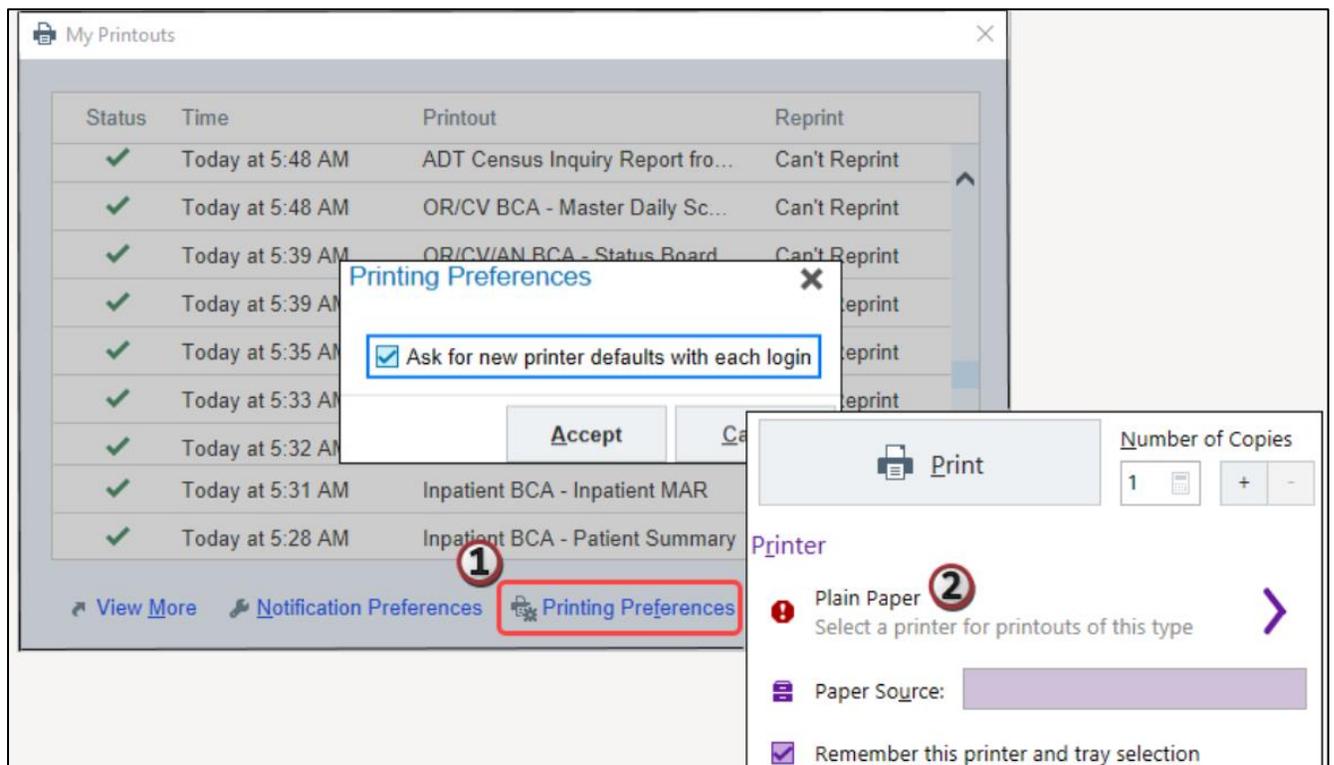




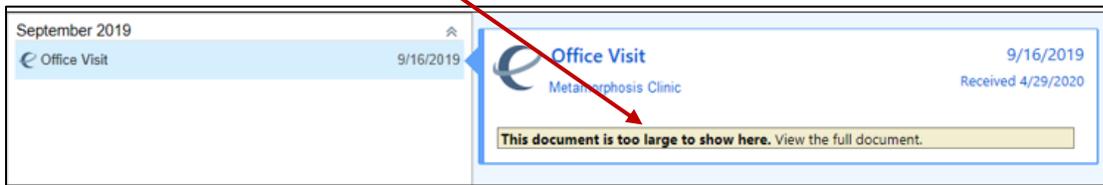
Chart Search Results Load More Quickly for External Documents

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 shows a patient's Epic storyboard for Kathryn D. Kidney. The patient's name, gender, age, date of birth, MRN, and code are displayed. A tooltip is shown over the cooler icon, listing transplant episodes. The tooltip title is "All Transplant Episodes" and the first entry is "Liver Transplant - 4/28/2019 (#1)". The status is "Active Follow-up on 4/28/2019" and the coordinator is "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

