

HUDDLE NOTES

March 7 Epic Update – SBO

Updated Feb. 18, 2021

March 7 Epic Update Preparation

- Our next **Epic Update is rescheduled for Sunday, March 7**. This update includes features and enhancements to improve safety and quality of patient care, productivity and financial outcomes.
- **Update Companions** are now available for review. **These now include at-a-glance views of top changes for your role on the first page**, as well as summaries of new workflows and enhancements and guided activities.
- Easier to find your **Companions** – no more required acknowledgement button to click:
 - Epic Learning Home (press **F1** on your keyboard)
 - IT website (it.houstonmethodist.org/epicupdate/)
 - Targeted eNewsletters
- Practice in the Epic Playground using the **Update Companion's** guided activities. For Epic Playground access, review the [Epic Playground Logins guide](#).
- Planned Epic Downtime from **2 to 4 a.m. on Sunday, Mar. 7** for the Epic Update. Follow your standard [downtime instructions](#).
- Visit the [Epic Update web page \(it.houstonmethodist.org/epicupdate/\)](http://it.houstonmethodist.org/epicupdate/) for regular updates and resources.

Top Changes for SBO Staff

The most significant changes for your role with the Epic Update include:

- Simple filters help in the new one Inquiry tab in Guarantor Account Maintenance.
- Easily create payment plans from Enterprise Guarantor Summary.
- Use quick distribution shortcuts in Payment Collection.
- Paste like a pro in Hospital Account Lookup.
- Transfer payments to system-suggested guarantors.

Top Changes for SBO Leaders

The most significant changes for your role with the Epic Update include:

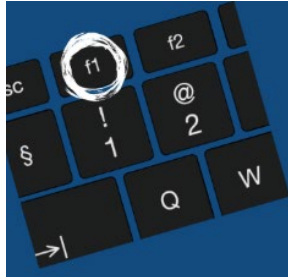
- Revenue and Usage report is now called HB Posted Charges Summary Report and is in Reporting Workbench.
- Report on COVID-19 information in Denials Report.
- Easily create payment plans from Enterprise Guarantor Summary.
- Use quick distribution shortcuts in Payment Collection.
- Paste like a pro in Hospital Account Lookup.



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**Press F1 on your keyboard
while logged in to Epic**

*to access your Update Companion
and the Epic Learning Home.*

