

Epic Update Companion

Aug. 15



Leadership/Single Billing Office

Updated: 7/23/21

On **Sunday, Aug. 15**, 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:

- Directors
- Managers
- Supervisors

Top Changes for Your Role:

1. [Status Summary Activity Tab Moving Permanently to Storyboard.](#)
2. [Find Credits Faster with New SlicerDicer Filter.](#)
3. [Filter Payments and Adjustments in Tx Inquiry.](#)



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.



Reporting – SlicerDicer



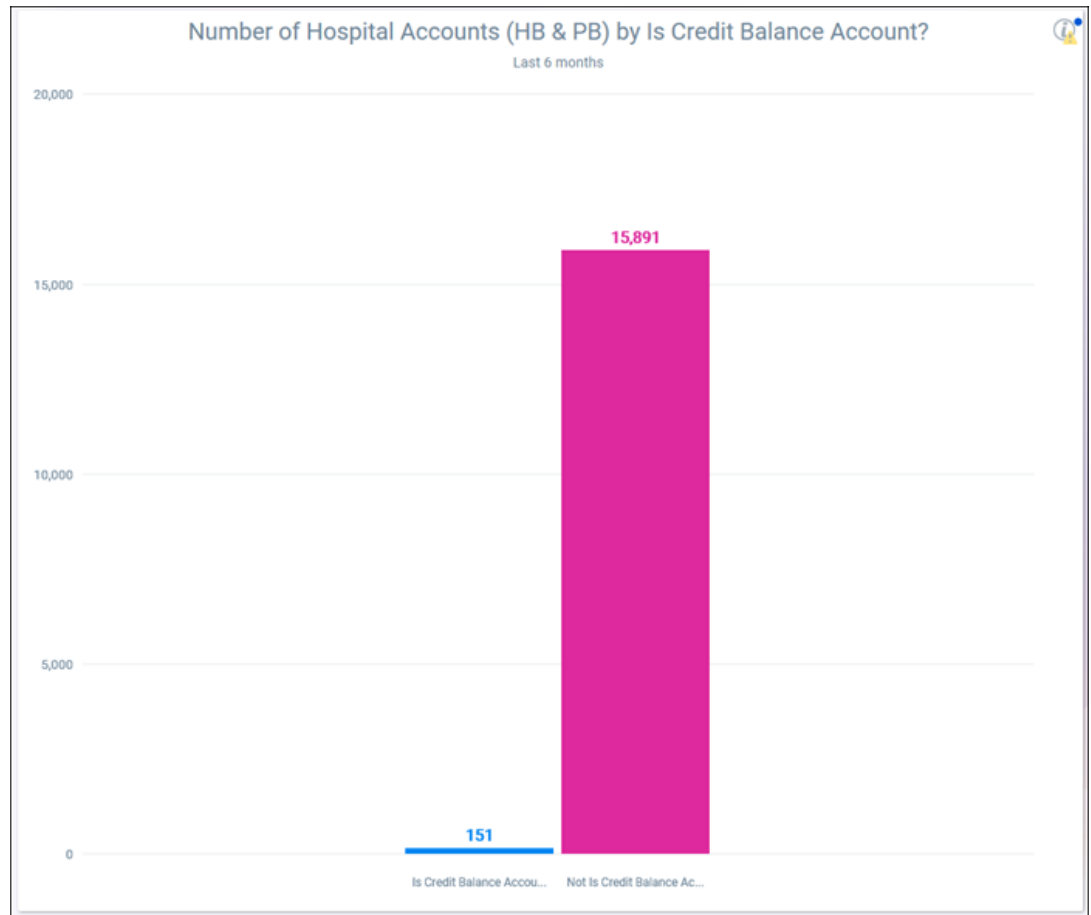
Is There a Credit Balance? SlicerDicer's Got Answers

Key Benefits:

- Financial benefit

Description:

To help you easily identify accounts with credit balances for follow-up, a new SlicerDicer filter, **Is Credit Balance?**, is now available in the **Hospital Accounts** data model.



Storyboard



Launch Status Summary from Storyboard

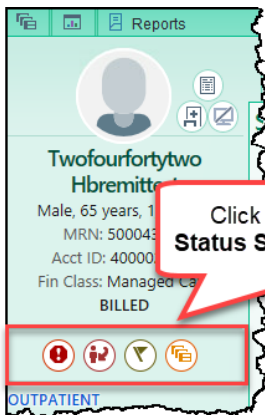
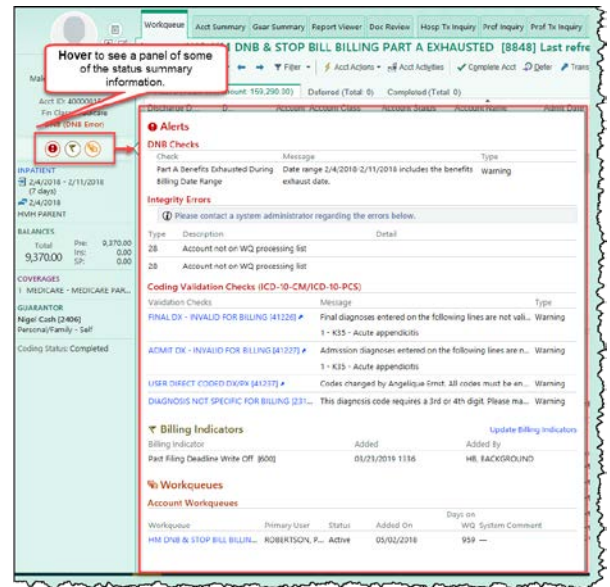
Key Benefits:

- Less clutter

Description:

The **Status Summary** activity tab in **Account Maintenance** is no longer available as a permanent activity tab along the top of an account.

Instead, from **Storyboard**, hover over the billing alerts section to quickly preview some of the **Status Summary** information.



You can also click anywhere in the billing alerts **Storyboard** section to access a temporary **Status Summary** activity tab.

In addition to this change, billing alerts for patient workqueues, coding validation checks, Revenue Guardian checks and integrity errors have also been added as additional alerts.

How to:

1. From the **Epic Playground**, open account workqueue **8848 HM DNB & Stop Bill Billing Part A Exhausted**. This workqueue is just to review the new method to view an account's status summary. This applies to anywhere a **Status Summary** activity tab was available.
2. Notice there is no longer a **Status Summary** activity tab across the top.
3. Click on any Nigel patient's account and hover over the billing alerts on the in **Storyboard**.
4. The billing alerts panel opens with some of the **Status Summary** status summary information.
5. To see all **Status Summary** information as in the past, click on any part of the billing alerts section to see a temporary **Status Summary** activity tab.



Billing



Prebilled Charges Appear in More Appropriate Phase in Bundled Episode

Key Benefits:

- Improved workflow
- More accuracy and reliability

Description:

You can now find **Hospital Billing** charges in the prebilled bucket of a hospital account in the billing phase of a bundled episode that includes the service date on the charges. Previously, these charges appeared in the phase that included the hospital account's admission and discharge dates.

Evaluation	Transplant	Follow-up	View Entire Episode						
Jun 1, 2020 to Jun 30, 2020	Jul 1, 2020 to Jul 31, 2020	Aug 1, 2020 to Aug 31, 2020	Combine All Phases						
Related to Transplant Phase			Transplant Balances						
Total Charges 128,790.00		Total Payments -80,000.00		Remaining Expected Payment 20,000.00 out of 100,000.00					
Hospital	128,790.00	Primary Payer	-80,000.00	Hospital					
Professional	0.00	Other Payer	0.00	Charges					
External	0.00	Self-Pay Payments	0.00	Payments					
				Adjustments					
				Balances					
				16,790.00					
				0.00					
Visits									
Hospital Accounts									
<input type="checkbox"/> Show All Hospital Accounts									
Select All Deselect All Acct Activities									
Acct ID	Location	Class	Adm Date	Dis Date	Status	Charges	Payments	Adjustments	Balance
62950	JBR City Location	Inpatient	07/05/20	07/20/20	BILLED	121,250.00	-80,000.00	-30,312.50	10,937.50
62954	JBR City Location	Outpatient	07/25/20	07/25/20	BILLED	3,000.00	0.00	-750.00	2,250.00
62956	JBR City Location	Inpatient	06/28/20	07/02/20	BILLED	790.00	0.00	0.00	790.00





Filter Payments and Adjustments in Transaction Inquiry

Key Benefits:

- More efficient

Description:

Filter payments and adjustments in **Transaction Inquiry** by clicking the **Filters** button.

You can filter by:

- Service date
- Post date
- Procedure
- Payor
- Source

The filters can also be applied as exclusive by selecting the **Exclude** button.

The screenshot shows a 'Payment Filters' dialog box with the following components:

- Amount:** Includes 'From' and 'To' date pickers, an 'Exclude' checkbox, and a search icon.
- Payer:** Includes a search field with a magnifying glass icon and an 'Exclude' checkbox.
- Post Date:** Includes 'From' and 'To' date pickers, an 'Exclude' checkbox, and a search icon.
- Procedure:** Includes a search field with a magnifying glass icon and an 'Exclude' checkbox.
- Source:** Includes a search field with a magnifying glass icon and an 'Exclude' checkbox.
- Svc/Dep Date:** Includes 'From' and 'To' date pickers, an 'Exclude' checkbox, and a search icon.
- Buttons:** 'Clear All Values' (with a trash icon), 'Apply Filters' (with a checkmark icon), and 'Cancel' (with an X icon).





Refreshed Transaction Actions in HB Transaction Query Report

Key Benefits:

- Personalizing your workflow

Description:

Transaction actions in the **HB Transaction Query** report have a new look. After clicking **Transaction Actions** in the toolbar, a new window appears where you can select and launch an action in a window of its own.

The screenshot shows the 'HB Transaction Query [344137] as of Mon 10/12/2020 3:25 PM' interface. A red box highlights the 'Transaction Actions' button in the toolbar, with a red arrow pointing to the 'Transaction Actions' window that opens. The window contains the following elements:

- Actions** section with a 'Total Amount' of **8,600.00**.
- Perform On** section with buttons for 'Selected Transactions (1)' and 'All Transactions (297)'. 'Selected Transactions (1)' is highlighted.
- Transaction Actions** section with buttons for 'Correct', 'Add Charge', 'Duplicate Charge', and 'Reverse'. 'Correct' is highlighted.
- Account Actions** section with checkboxes for 'Account Note', 'Billing Indicators' (checked), 'Send Letter', and 'Stop Bills'.
- A warning message: '? Tx actions will only be performed on active transactions. All actions will reopen closed accounts.'
- Buttons for 'Continue' and 'Cancel' at the bottom right.



Self-Pay



Override Self-Pay Discount Has New Look and More Options

Key Benefits:

- More efficient
- Improved workflow

Description:

With the refreshed **Override Self-Pay Discount** activity, you can enter a discount percentage and reason on the **User Override** tab, or switch to the **System Calculated** tab to see how your self-pay discount rules and contracts would calculate the discount without user intervention.

A screenshot of the "Override Self-Pay Discount" interface. The title bar shows "Override Self-Pay Discount" with a percentage icon. Below the title, there are two tabs: "System Calculated" (light blue) and "User Override" (dark blue). Under the "User Override" tab, there is a "Discount Source" field with an information icon, a "Discount Percent" field with a calculator icon, and a "Reason" field with a search icon. The "Discount Percent" field contains "0.00" and the "Reason" field contains "Patient Satisfaction".

User Productivity Tracking



Track Your Payment Posting Staff's Productivity with EB Payment Posting Supervisor Scorecard

Key Benefits:

- Improved communication

Description:

You can use the new **EB Payment Posting Supervisor Scorecard** to view combined productivity metrics for **Resolute Hospital Billing** and **Resolute Professional Billing** payment posting data for a specific team or user.

EB Payment Posting Supervisor Scorecard Aug 2020 -

Staff: LEE, ANA, THEO, EVAN ... Compare to: Best, worst, and aver...

Staff	Average Daily Time to Post	Manual Payments Posted	Manual Payments Posted Amount	Batch Payments Posted	Batch Payments Posted Amount	Error Deleted Payments Posted	Error Deleted Payments Posted Amount	Error Deleted Payments Removed	Error Deleted Payments Removed Amount	PR Credit Adjusts
Overall Best	N/A	110	\$10,882	6	\$2,832	4	\$1,868	3	\$1,400	15
Group Average	2h 33m	60	\$4,326	4	\$1,318	2	\$1,105	2	\$815	8
Overall Worst	N/A	10	\$656	2	\$66	1	\$16	1	\$26	1
Ana Lee	2h 46m	31	\$10,882	6	\$1,055	4	\$1,868	3	\$1,019	1
Evan Theo	2h 49m	10	\$656	4	\$66	1	\$16	2	\$26	-
Mitch Devine	4h 44m	110	\$1,439	2	\$2,832	1	\$1,432	1	\$1,400	15





Payment Posters Can View Their Own Metrics with EB Payment Posting User Scorecard

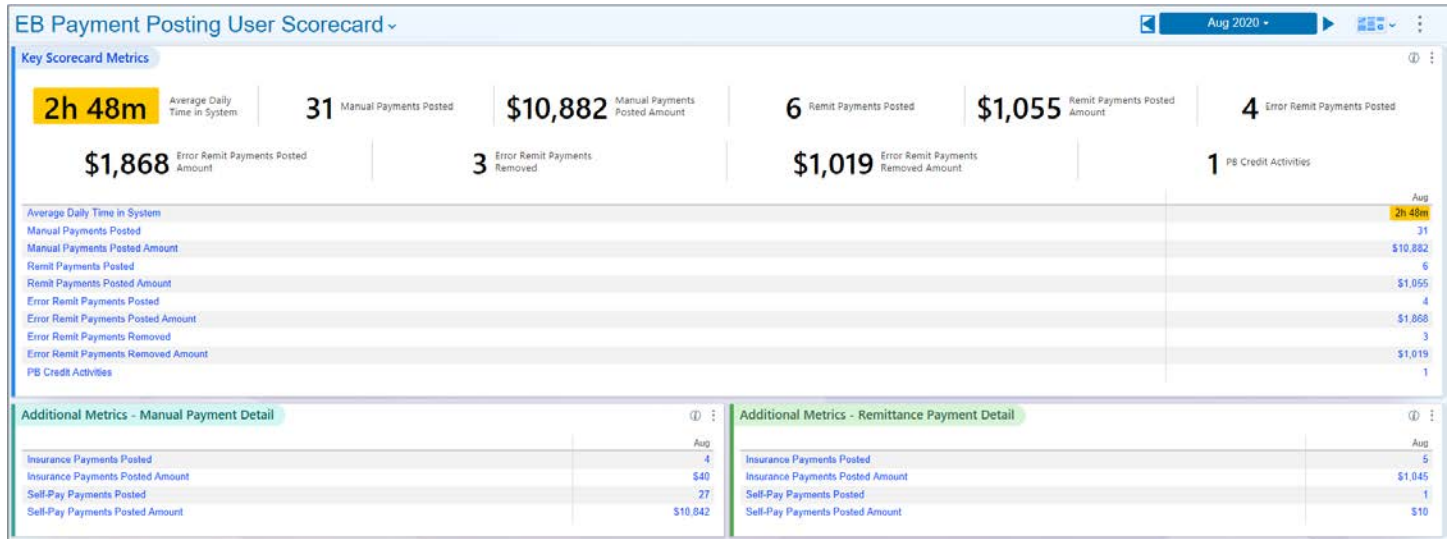
Key Benefits:

- User productivity transparency

Description:

You can use the new **EB Payment Posting User Scorecard** to view your combined productivity metrics for **Resolute Hospital Billing** and **Resolute Professional Billing** payment posting data.

Please note this may not be an accurate or as up-to-date reflection of your actual productivity. Ask your manager for further details.



Good to Know



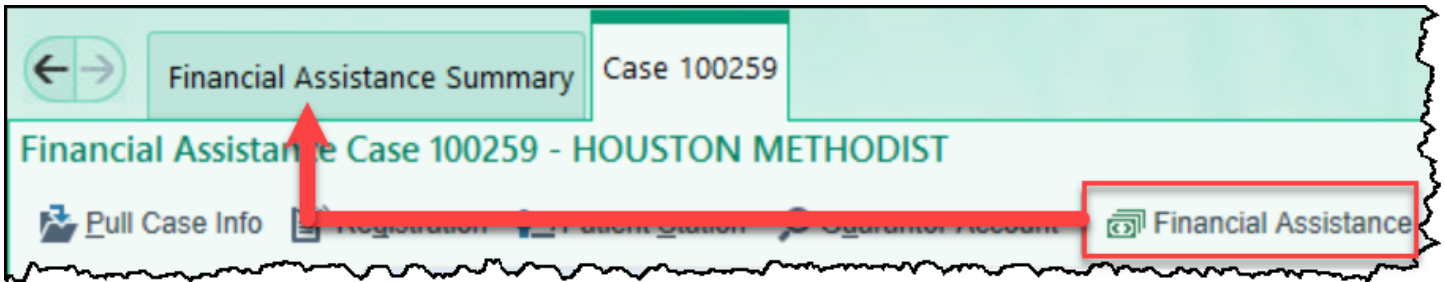
Save Time with New Financial Assistance Toolbar Button

Key Benefits:

- Time saver

Description:

Use the new **Financial Assistance** toolbar button in **Case Edit** to return to the **Financial Assistance Summary** activity without reselecting the patient.





Request Patient E-Signatures in MyChart

Key Benefits:

- More efficient

Description:

To make it easier for patients to sign documents, such as consent forms, you can now select a checkbox in the **E-Signature Document Collector** activity so patients can sign those documents in **MyChart**.

When a patient has a document to sign, a new card appears in their **MyChart** health feed with a link to the **My Documents** activity.

Type	Status	Received By	R.. E..
ABN	-	-	- -
ABN <i>Testing New ABN Options- PASSED</i>	ABN Signed,...	BANDA, JUANA	0... -
CBO Auth for Disp & Use of Inf	Not Received	-	- -
CBO ROI	Not Received	-	- -
Hosp - Consent for Treatment	Not Received	-	- -
Medicare Message	-	-	- -
Medicare OP Obs Notice	Not Received	-	- -
Notice of Privacy Practice	Received	TORRES, WHITNEY	0... 0...
PAS Patient Disclosures	Not Received	-	- -

I understand that this consent form will be valid and remain in effect as long as I receive my medical care at Houston Methodist. I understand that this consent may be revoked in writing at any time.

*If Translation Services were provided for the patient, please list entity here

Patient Signature
Patient
Date June 21, 2021

Sign Here

*Signature

Send to Patient Accept & Print Accept Cancel



Single Billing Office Leadership Aug. 15 Epic Update Companion

My Documents 3

Documents to sign

Consent Form
Office Visit on 3/17/2021

QA MyChart WI HPE Family Practice
 David MyChart, MD

[Review and sign](#) [Go to visit details](#)

Consent Form
Sent to you on 2/23/2021

[Review and sign](#)

Other documents

Document type	Date
KneeSwelling.tiff	Added on 3/10/2021
ACL Replacement Surgery Description	Added on 2/11/2021
HIPAA Notice of Privacy	Signed on 1/28/2021

The updated My Documents page patients see in MyChart.

MyChart

Menu Visits Messages Document Center Medications

Welcome!

Office Visit

Apr 5 Mon Starts at 4:00 PM CDT

WI HPE Family Practice

With David Carter, MD

[I'm here](#)
[View details](#)

4 Review and sign the Consent Form for your Office Visit on 4/5/2021.

[Review and sign](#)

[View all \(4\)](#)

The health feed card patients see when a document is waiting for their signature.

PO - Consent for Treatment

third party action against any other person, entity, or insurance company, or out of recovery under the uninsured/underinsured motorist provisions of the medical payment provisions of any automobile insurance policy(ies) under which the patient may be entitled to recover. The undersigned further authorizes and appoints Houston Methodist as an authorized representative to pursue any claim to which he/she may be entitled to pursue or otherwise assert to obtain benefits or reimbursements from any responsible party, but in no event shall this be construed to be an affirmative obligation of Houston Methodist to pursue any such claim(s). The undersigned understands that if Houston Methodist is not paid in full by proceeds of any insurance policies, benefit plans or other sources of funds, then this assignment does not release his/her obligation and liability to Houston Methodist for payment of services and items provided by Houston Methodist.

I understand that this consent form will be valid and remain in effect as long as I receive my medical care at Houston Methodist. I understand that this consent may be revoked in writing at any time.

5 **Raisin Bran**
Signature generated for Raisin Bran at 7/1/2021, 12:00:05 PM

Date July 1, 2021

*Signature



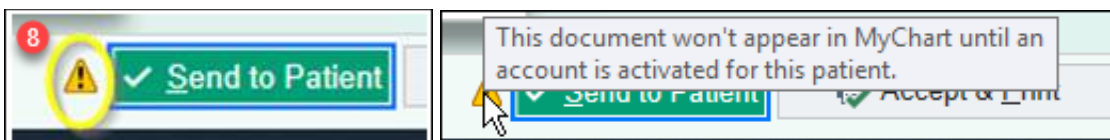
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Documents


New Document Type Show All Documents

Type	Status	Received By	R... E...
PO - Consent for Treatment	Not Received	-	- -
Medicare Message	-	-	- -
Medicare OP Obs Notice	Not Received	-	- -
Notice of Privacy Practice	Received	TORRES, WHITNEY	0... 0...
PAS Patient Disclosures	Not Received	-	- -
PAS Price Estimation	Received	BANDA, JUANA	0... -
<i>Pretend Status of Received/Scanned Signed Estimate Letter</i>			
Photo ID	Received	TORRES, WHITNEY	0... -
6 PO - Consent for Treatment	Received	7 OPEN SCHEDULING, BACKGROUND	0... 0... <input type="button" value="E-Sign"/> <input type="button" value="Print"/> <input type="button" value="Delete"/>
PO - Consent for Treatment	-	-	- -
PO Add - Consent for Treatment	Not Received	-	- -

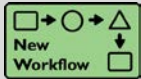
Double-click to acquire/view a document



How to:

1. On the document, click the **E-Sign** icon.
2. Check the **Send to Patient** box to send the electronic document to the patient for signature.
3. The patient will see documents that needs signatures in **MyChart**.
4. The patient clicks **Review and sign**.
5. The patient signs the document via **MyChart**.
6. On the **Documents** table, you can view the sent estimate by clicking the  icon.
7. When the patient has completed the form, the status updates to **Received** and displays **OPEN SCHEDULING BACKGROUND** user.
8. A warning will display if the patient does not have a **MyChart** account.





View MyChart Proxies in Patient Contacts

Key Benefits:

- Time saver

Description:

You can now view proxy relationships directly from the **Patient Contacts** section without going to **MyChart Administration** activity.

How to:

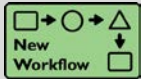
1. Click the pencil icon in the **Patient Contacts** form.

A screenshot of the Patient Contacts table. The table has columns for Name, Relationship, Home Phone, Work Phone, Mobile Phone, and Comment. The first row shows a contact named 'Cadence, Spouse' with relationship 'Spouse' and home phone '713-898-7788'. A pencil icon in the right-hand column of this row is highlighted with a red box.

2. You can view the patient **Proxy** relationships.

A screenshot of the Patient Contacts form. The form is titled 'Patient Contacts' and contains various fields for patient information. The 'MyChart Proxy Access To Self' section is highlighted with a red box. This section shows 'Spouse Cadence's MyChart Status: No MyChart account attached' and two radio button options: 'Proxy Access' (selected) and 'No Proxy Access'.





Show Estimates in MyChart

Key Benefits:

- More efficient

Description:

Estimates are getting their own page in **MyChart**. By going to **Billing > Estimates** from the **MyChart** menu, patients can see estimates created and finalized. When a patient hovers over an estimate associated with a scheduled visit, links to the visit and to the prepay option appear if this information is available.

The **Visit Information** page for the associated visit also links back to this page.

Select an estimate for more details.

Mammo Breast Diagnostic Tomosynthesis Bilateral, Us Breast Complete Right & Us Thyroid
6/15/2021 8:00 AM [View visit](#)
\$1,413 (your estimated payment)
Houston Methodist Baytown Hospital
Reference #1386904
Created 6/14/21 [Pay prepay](#)

Finalized Estimates
These estimates have been confirmed or prepared for you by our staff. Select an estimate for more details.

PB MAMMO Breast
\$70 (your estimated payment)
HOUSTON METHODIST PRIMARY CARE GROUP
Gregory Terry, MD
Reference #1386905 Valid for 31 days
Created 6/14/21

US ABDOMEN COMPLETE
\$1,916 (your estimated payment)
Houston Methodist Baytown Hospital
Reference #529868
Created 7/29/19

COLONOSCOPY FLX DX W/COLLJ SPEC WHEN PFRMD
This estimate is being revised and may not be up to date.
\$2,250 (your estimated payment)
Houston Methodist Baytown Hospital
Reference #97670
Created 5/23/18

patients have been charged in the past.

How accurate are estimates?
Prices may vary and an estimate is not a quote or guarantee. We try our best to give you an accurate estimate. However, many factors go into the final cost.

Page 15 of 16

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See Coverage Documents from Interactive Face Sheet (IFS)

Key Benefits:

- More efficient
- Time saver

Description:

Click the **Coverage Documents** link in the IFS to view all documents linked to a coverage.

1. E-CIGNA/CIGNA PPO ⚡		Encounter coverage		Response History ^
Subscriber Demographics	Test,Mabe Address linked to patient	Home: 713-445-8585 Work:		
Coverage Info	Member ID: 123456789 Coverage Documents Subscriber ID:	Group: BakerHughes - 7* 123456789 Effective from: 11/1/2006	Rel to subscriber: Self	Auth phone:

Coverage Documents

Coverage ID Card 📄 Received on 5/4/2021 for Alice White	Insurance Card 📄 Received on 5/3/2021
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