Epic *Update Companion* Aug. 15

Staff/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:

- Customer Service Representatives
- Self-pay Follow-up and Collection Representatives
- Payment Posters

Top Changes for Your Role:

1. Status Summary Activity Tab Moving Permanently to Storyboard.
2. Show Estimates in MyChart.
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.

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.

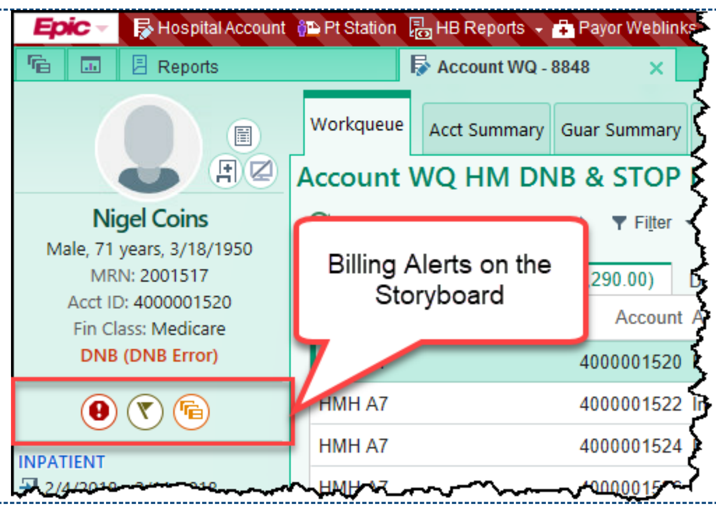
Instead, from **Storyboard**, hover over the billing alerts section to quickly preview some of the **Status Summary** information.

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 to the **Storyboard**.

The **Status Summary** activity tab displays any issues with the account including a history of those issues and an **Events Summary** of the encounter.

It's important to note where the Billing Alerts section of the Storyboard is.

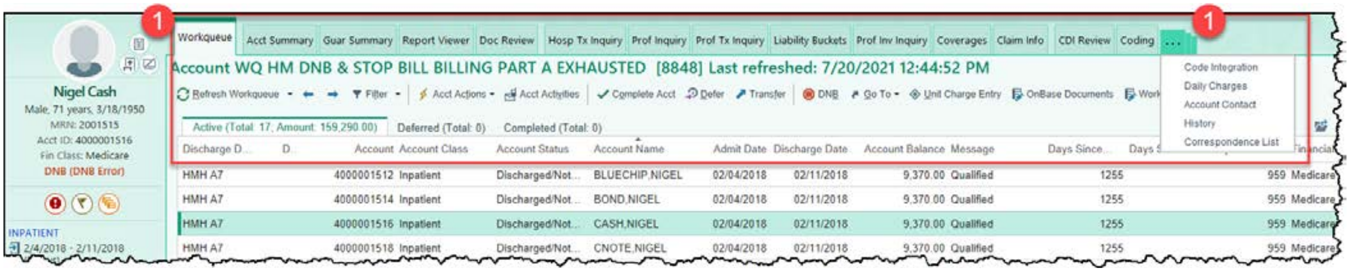


Access the Status Summary Activity Tab from a Workqueue

*Once you open a workqueue and click the **Billing Alerts** section, the **Status Summary** tab will persistently display until log out of Epic.*

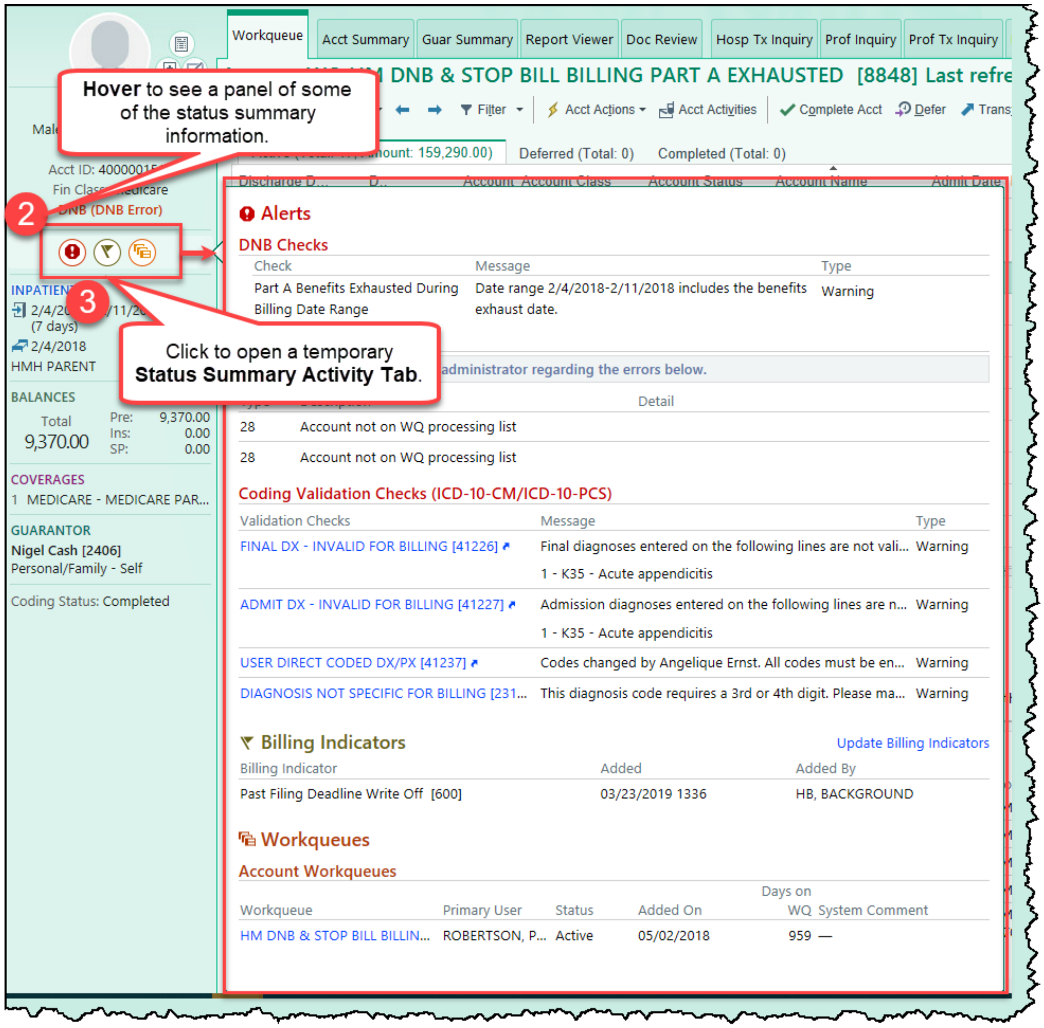
*When opening a workqueue for the first time for that current day, click the **Billing Alerts** section to have the **Status Summary** tab persistently appear for that specific workqueue.*

1. Notice that the **Status Summary** activity tab no longer appears in the **Activity Tabs** section of the hospital account or in the activity tabs overflow drop-down.



2. Hover over the **Billing Alerts** on the **Storyboard** to view some of the status summary information.

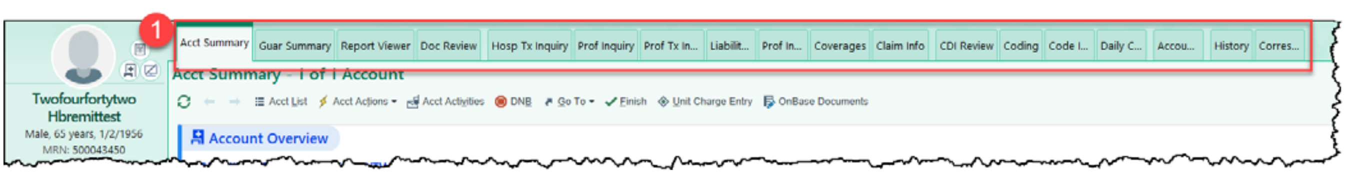
3. To see all status summary information as in the past, click on any part of the **Billing Alerts** section in the **Storyboard** to see a temporary **Status Summary** activity tab.



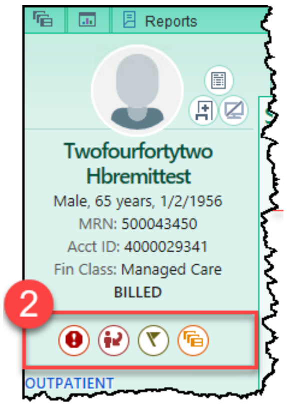
Access the Status Summary Activity Tab from Hospital Account

!	*Once you have opened the **Status Summary** tab for an account (from **Hospital Account**), it will persistently appear until you close the **Account workspace tab**.*

1. Notice that the **Status Summary** activity tab no longer appears in the **Activity Tabs** section of the hospital account or in the activity tabs overflow drop-down.



2. Click the **Billing Alerts** on the **Storyboard** to view with some of the status summary information.



3. The temporary **Status Summary** activity tab appears.

4. To close the tab, click the small "**x**" underneath the wrench icon.

Billing

New Feature

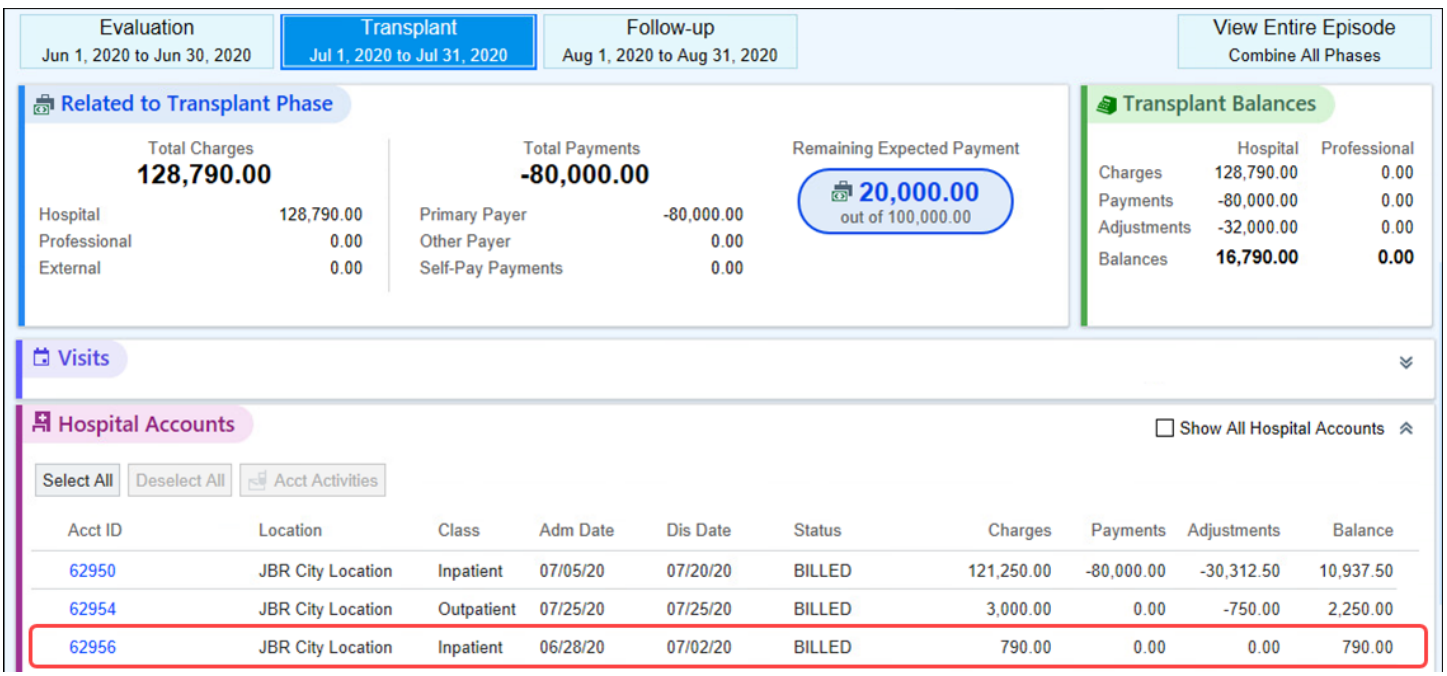
Prebilled Charges Appear in More Appropriate Phase in Bundled Episode

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** admission and discharge dates.



New Feature

Filter Payments and Adjustments in Transaction Inquiry

Key Benefits:

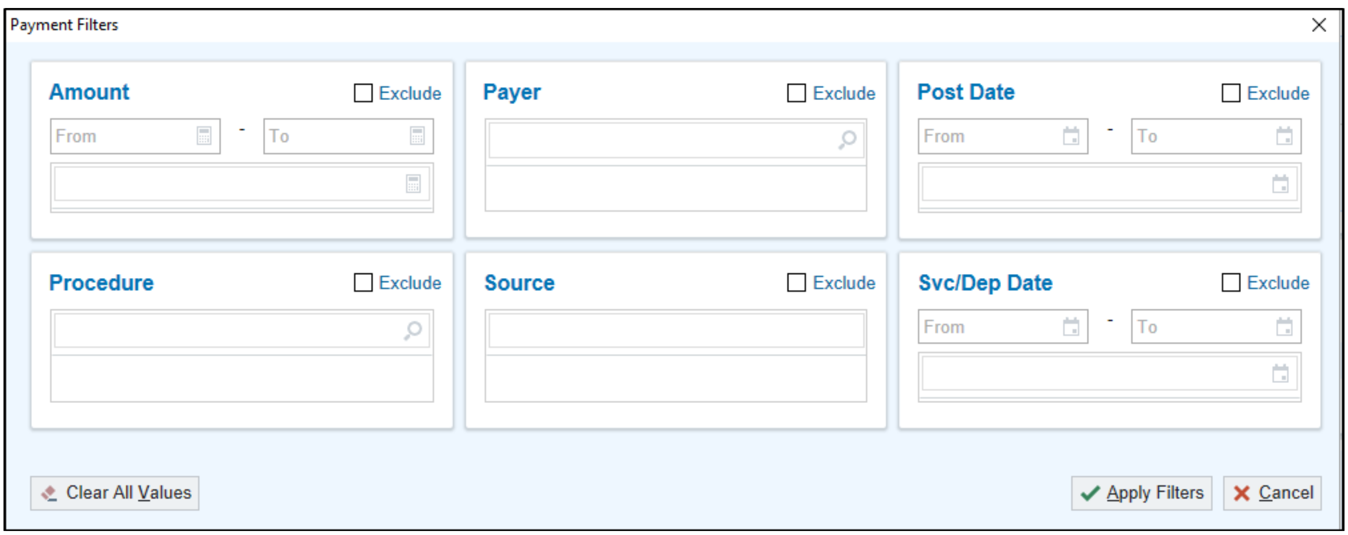
- More efficient

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.



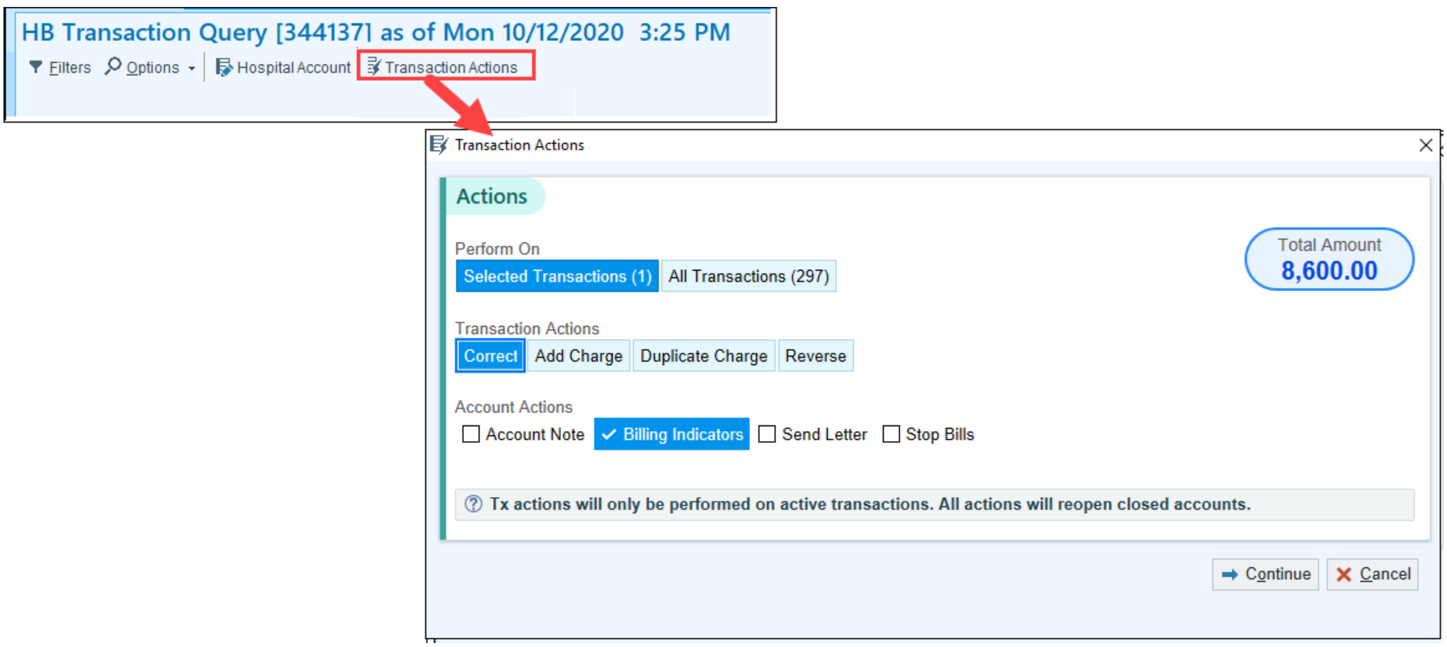
Refreshed Transaction Actions in HB Transaction Query Report

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 its own window.



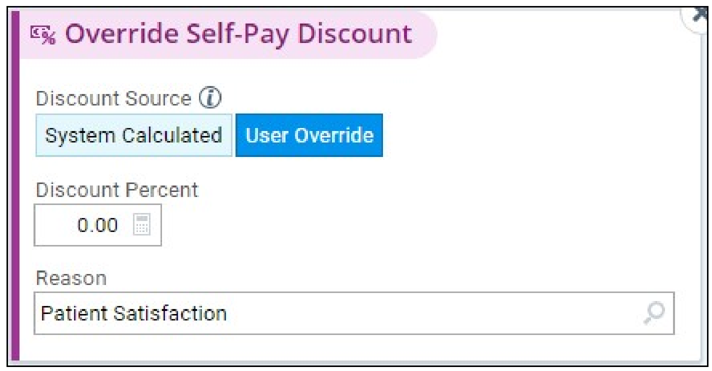
Self-Pay

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.



User Productivity Tracking

New Look

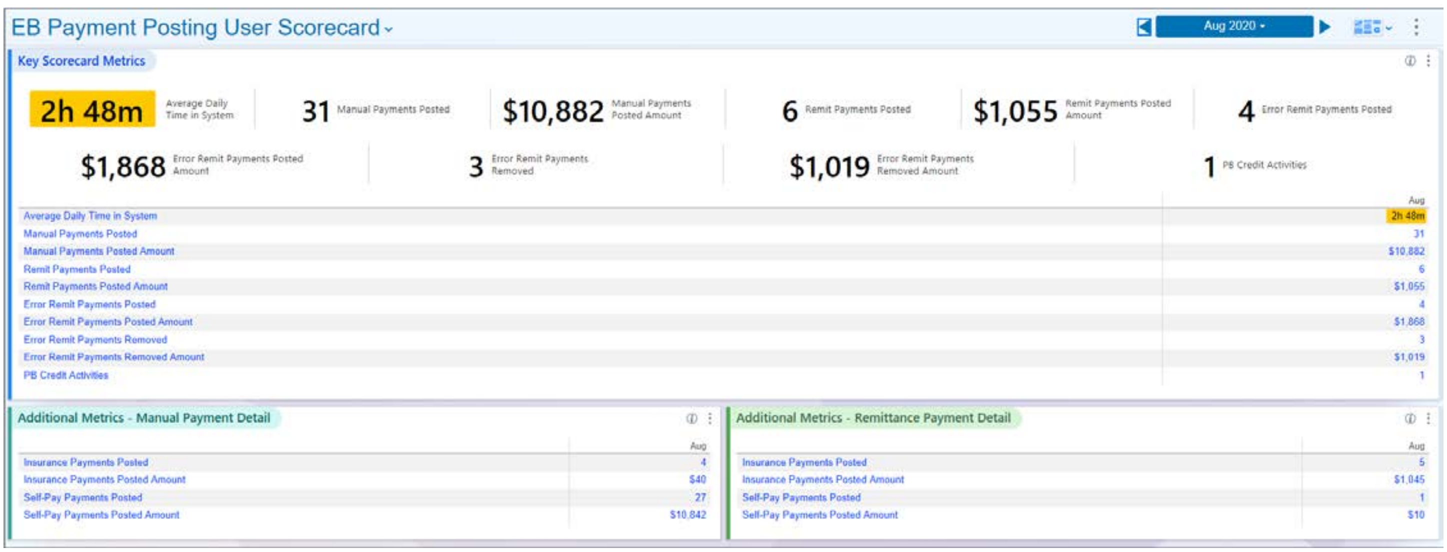
Payment Posters Can View Their Own Metrics with EB Payment Posting User Scorecard

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.



Good to Know

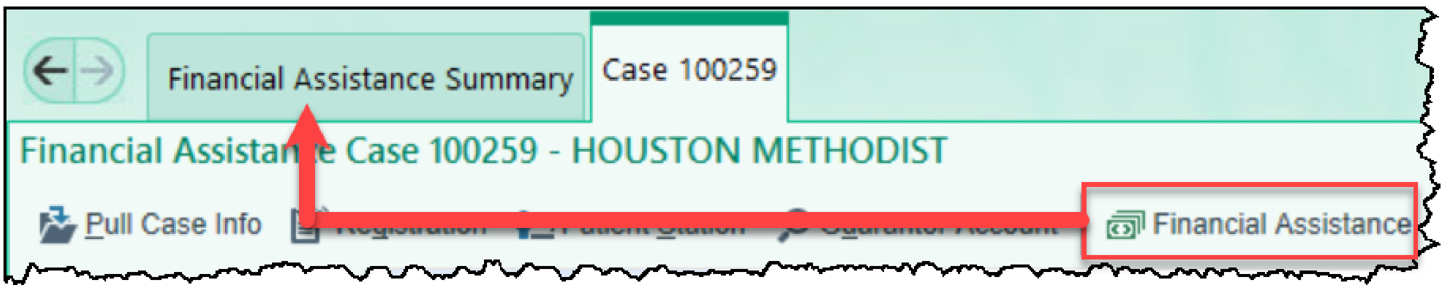
New Feature

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 having to reselect the patient.



New Feature

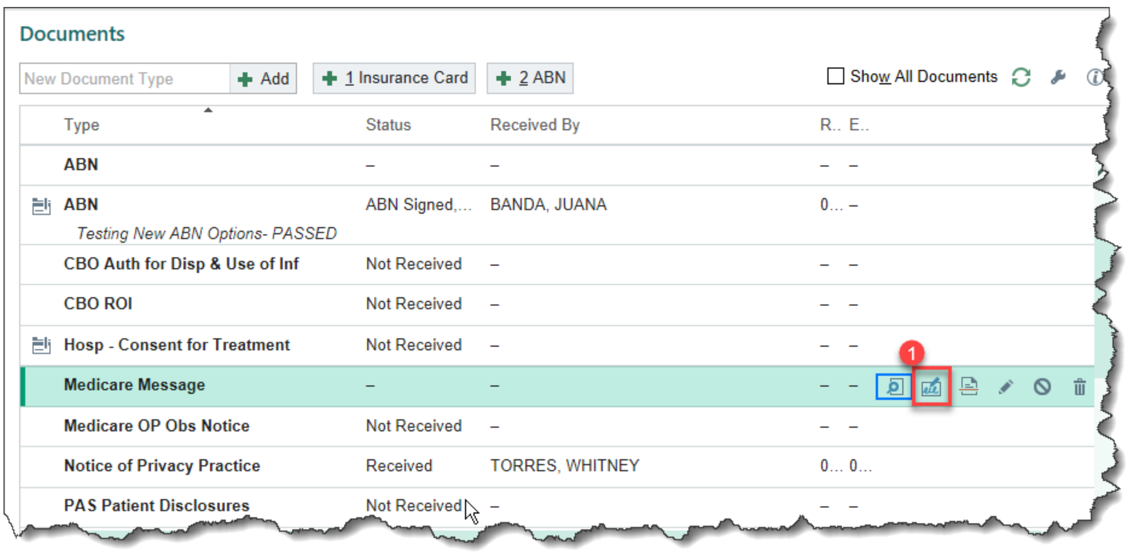
Request E-Signatures from Patients in MyChart

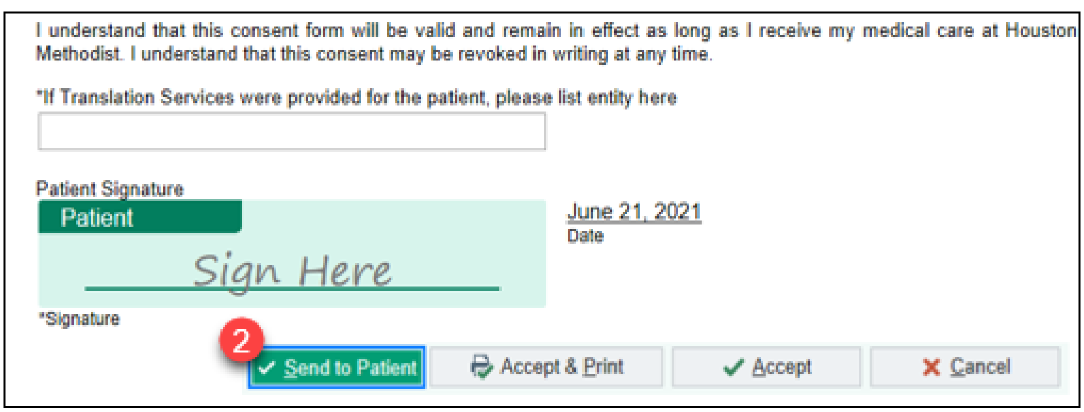
Key Benefits:

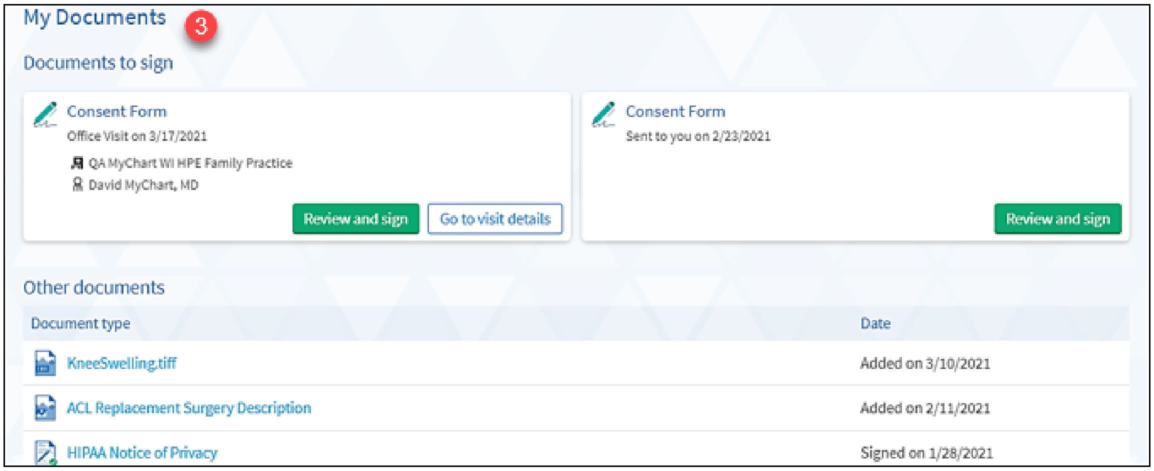
- More efficient

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**.

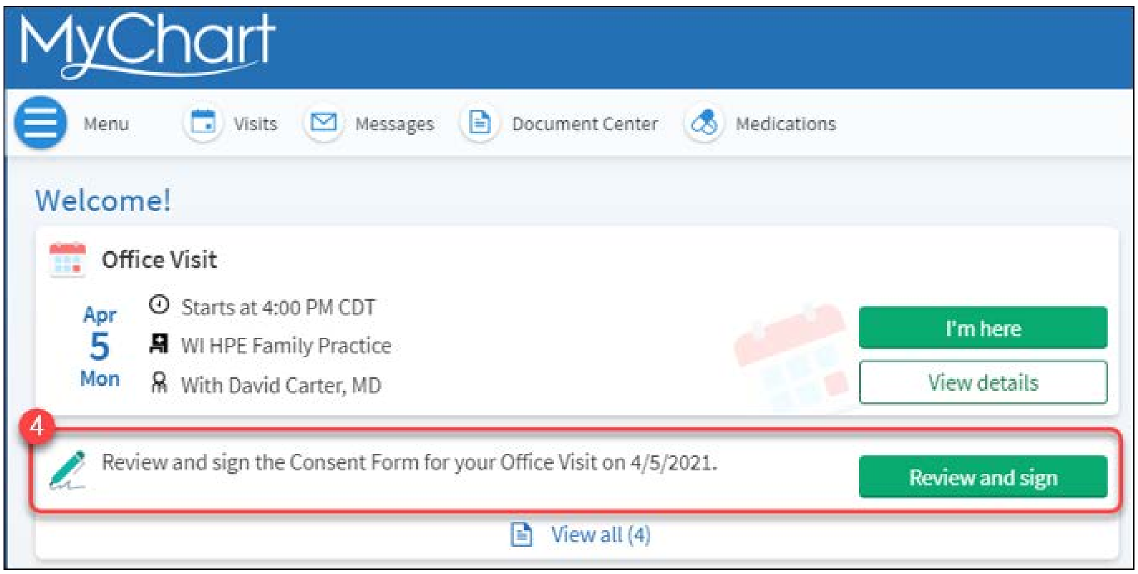
When a patient has a document to sign, a new card appears in their **MyChart** health feed with a link to the **My Documents** activity.



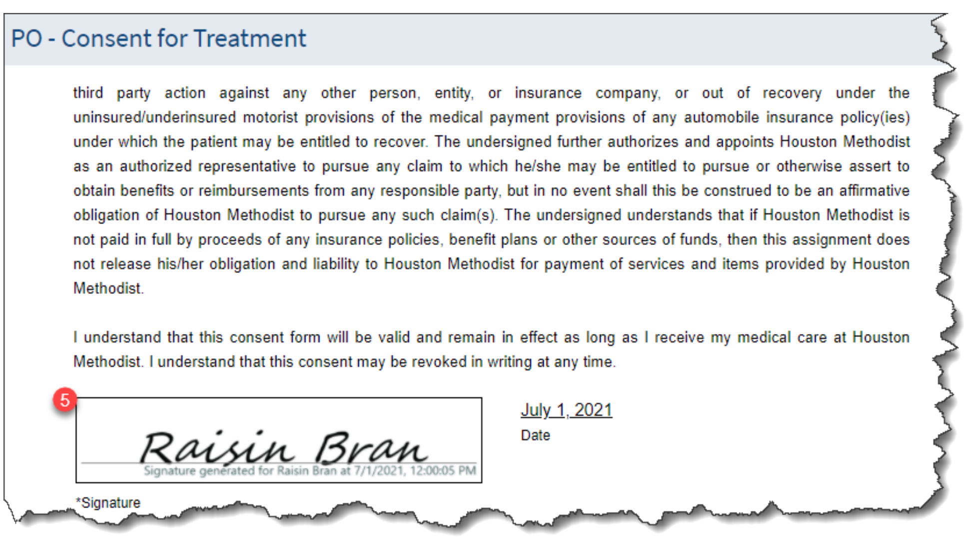




The updated My Documents page patients see in MyChart.



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.

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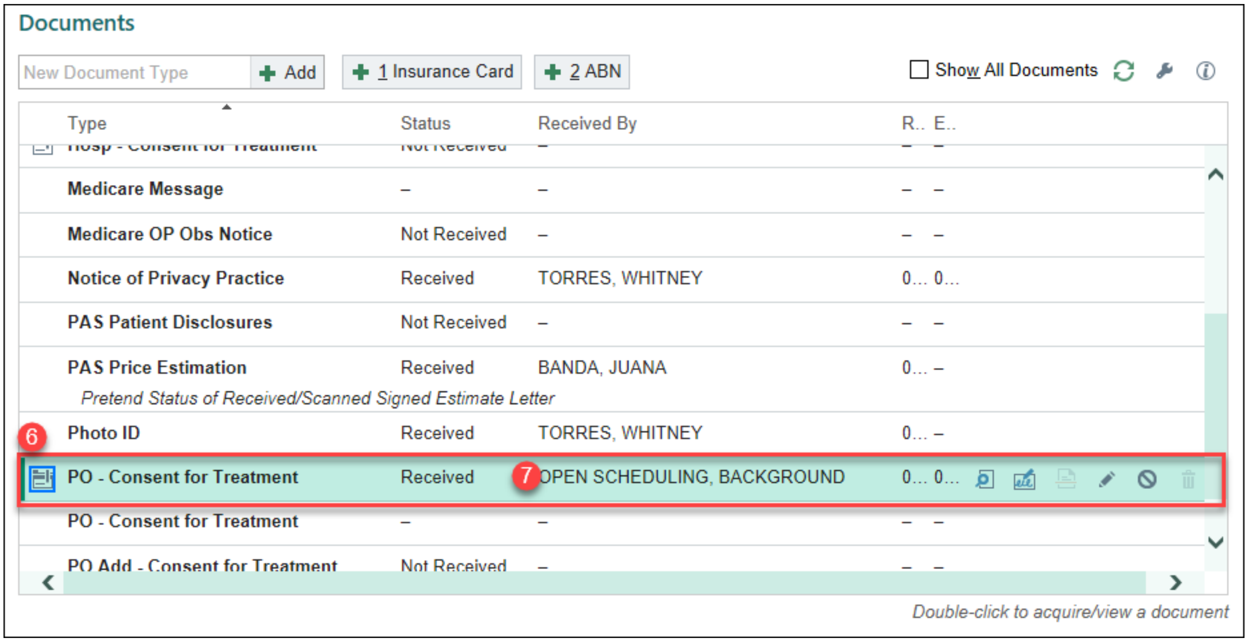
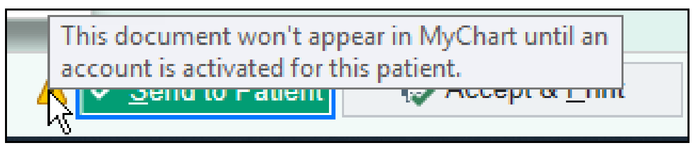
Raisin Bran
Signature generated for Raisin Bran at 7/1/2021, 12:00:05 PM
*Signature

July 1, 2021
Date





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.

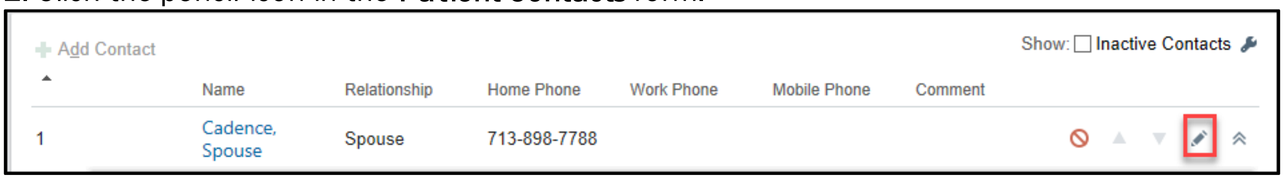
View MyChart Proxies in Patient Contacts

Key Benefits:

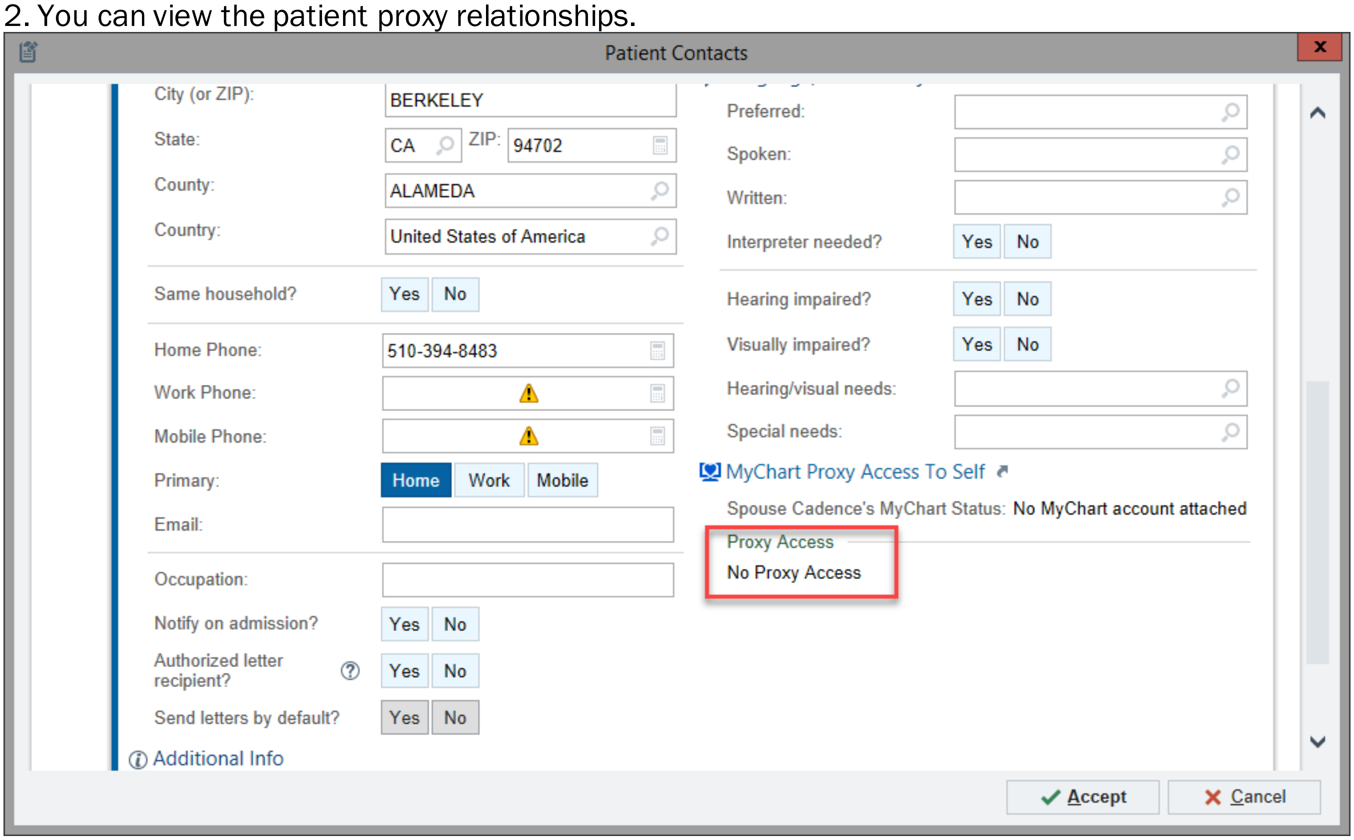
- Time saver

Description:
You can now view proxy relationships directly from the **Patient Contacts** section without needing to go to the **MyChart Administration** activity.

How to:
1. Click the pencil icon in the **Patient Contacts** form.



2. You can view the patient proxy relationships.



Show Estimates in MyChart

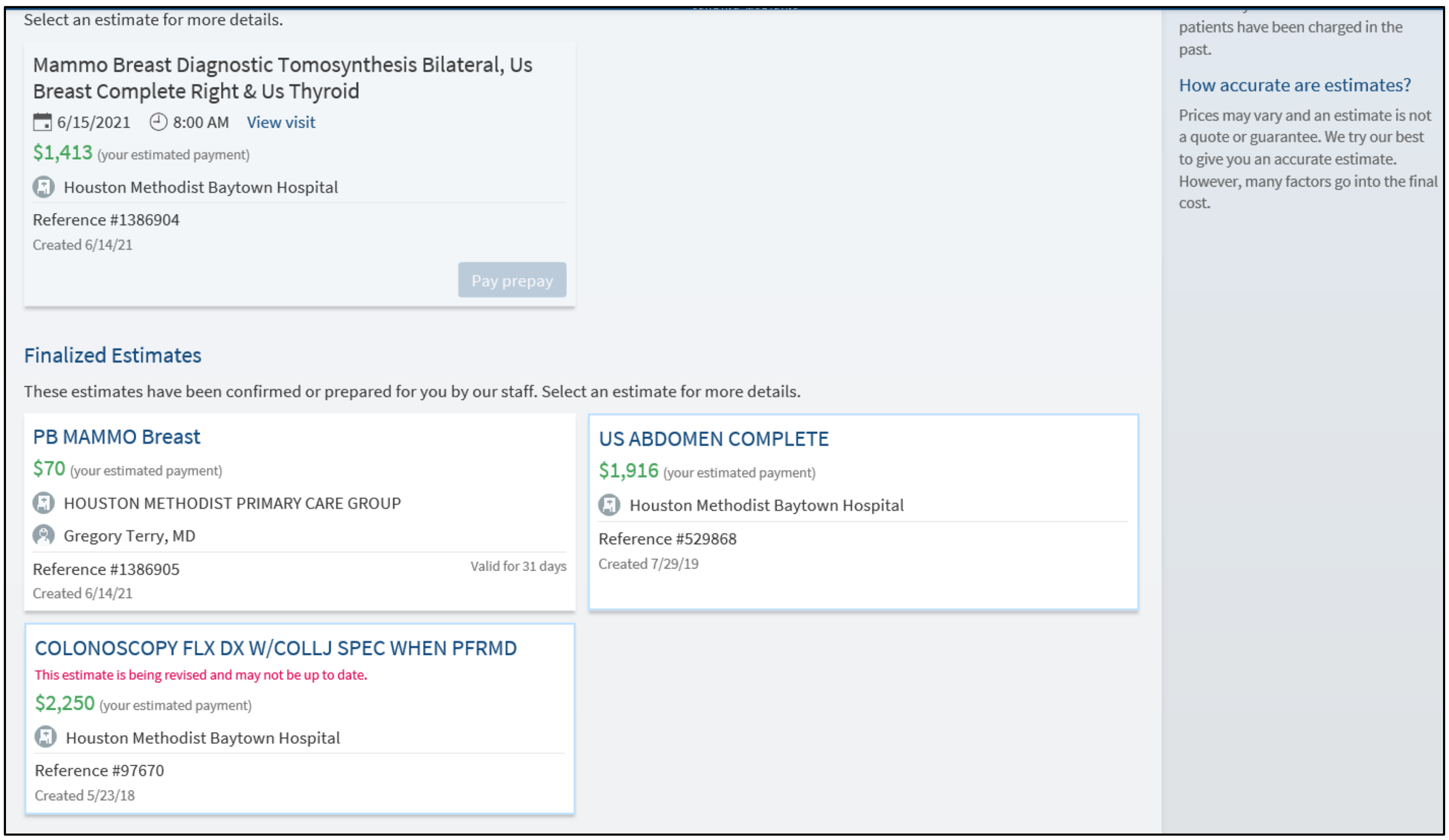
Key Benefits:

- 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.



New Feature

See Coverage Documents from the Interactive Face Sheet (IFS)

Key Benefits:

- More efficient
- Time saver

Description:

You can click the **Coverage Documents** link in the IFS to view all documents linked to a coverage.