

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.



The screenshot shows the Epic Storyboard interface for a patient named Nigel Coins. The patient's information includes: Male, 71 years, 3/18/1950, MRN: 2001517, Acct ID: 4000001520, Fin Class: Medicare, and a DNB (DNB Error) alert. The Billing Alerts section is highlighted with a red box, and a callout box points to it with the text "Billing Alerts on the Storyboard". The interface also shows tabs for Workqueue, Acct Summary, and Guar Summary, and a table of billing alerts.

Alert Type	Account ID
HMH A7	4000001522
HMH A7	4000001524
HMH A7	4000001520



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.

The screenshot shows the Epic EMR interface for a patient named Nigel Cash. The top navigation bar includes tabs for Workqueue, Acct Summary, Guar Summary, Report Viewer, Doc Review, Hosp Tx Inquiry, Prof Inquiry, Prof Tx Inquiry, Liability Buckets, Prof Inv Inquiry, Coverages, Claim Info, CDI Review, and Coding. A red box highlights the 'Status Summary' tab in the top right corner, with a red '1' next to it. Below the navigation bar, the patient's account information is displayed, including 'Account WQ HM DNB & STOP BILL BILLING PART A EXHAUSTED [8848] Last refreshed: 7/20/2021 12:44:52 PM'. A table below shows a list of active accounts with columns for Discharge Date, Account, Account Class, Account Status, Account Name, Admit Date, Discharge Date, Account Balance, Message, Days Since, and Days. The table contains four rows of data for patient Nigel Cash, all with a balance of 9,370.00 and a status of 'Qualified'.

Discharge D...	D...	Account	Account Class	Account Status	Account Name	Admit Date	Discharge Date	Account Balance	Message	Days Since...	Days Since...	Financial
		4000001512	Inpatient	Discharged/Not...	BLUECHIP_NIGEL	02/04/2018	02/11/2018	9,370.00	Qualified	1255		959 Medicare
		4000001514	Inpatient	Discharged/Not...	BOND_NIGEL	02/04/2018	02/11/2018	9,370.00	Qualified	1255		959 Medicare
		4000001516	Inpatient	Discharged/Not...	CASH_NIGEL	02/04/2018	02/11/2018	9,370.00	Qualified	1255		959 Medicare
		4000001518	Inpatient	Discharged/Not...	CNOTE_NIGEL	02/04/2018	02/11/2018	9,370.00	Qualified	1255		959 Medicare



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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.

Hover to see a panel of some of the status summary information.

Click to open a temporary Status Summary Activity Tab.

Alerts

DNB Checks

Check	Message	Type
Part A Benefits Exhausted During Billing Date Range	Date range 2/4/2018-2/11/2018 includes the benefits exhaust date.	Warning

Coding Validation Checks (ICD-10-CM/ICD-10-PCS)

Validation Checks	Message	Type
FINAL DX - INVALID FOR BILLING [41226]	Final diagnoses entered on the following lines are not vali...	Warning
ADMIT DX - INVALID FOR BILLING [41227]	Admission diagnoses entered on the following lines are n...	Warning
USER DIRECT CODED DX/PX [41237]	Codes changed by Angelique Ernst. All codes must be en...	Warning
DIAGNOSIS NOT SPECIFIC FOR BILLING [231...	This diagnosis code requires a 3rd or 4th digit. Please ma...	Warning

Billing Indicators

Billing Indicator	Added	Added By
Past Filing Deadline Write Off [600]	03/23/2019 1336	HB, BACKGROUND

Workqueues

Account Workqueues

Workqueue	Primary User	Status	Added On	Days on WQ	System Comment
HM DNB & STOP BILL BILLIN...	ROBERTSON, P...	Active	05/02/2018	959	—

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.

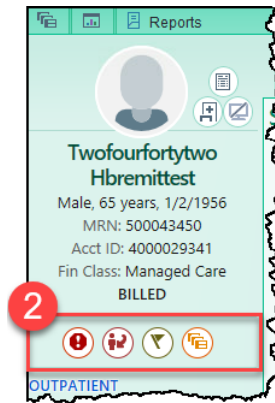
Twofourtytwo Hbremittest
Male, 65 years, 1/2/1956
MRN: 500043450

Account Summary - 1 of 1 Account

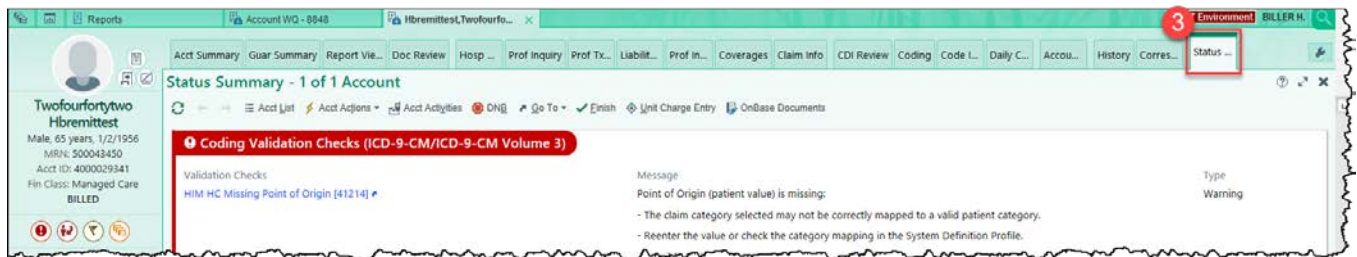
Account Overview



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



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.

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		Total Payments	Remaining Expected Payment	
128,790.00		-80,000.00	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 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 input field and an 'Exclude' checkbox.
- Post Date:** Includes 'From' and 'To' date pickers, an 'Exclude' checkbox, and a search icon.
- Procedure:** Includes a search input field and an 'Exclude' checkbox.
- Source:** Includes a search input field 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 its own window.

The screenshot shows the 'HB Transaction Query [344137] as of Mon 10/12/2020 3:25 PM' interface. In the toolbar, the 'Transaction Actions' button is highlighted with a red box and a red arrow pointing to the 'Transaction Actions' dialog window. The dialog window has a title bar 'Transaction Actions' and a close button. It contains the following elements:

- Actions** section:
 - Perform On:** 'Selected Transactions (1)' (selected) and 'All Transactions (297)'. A 'Total Amount' badge shows **8,600.00**.
 - Transaction Actions:** 'Correct' (selected), 'Add Charge', 'Duplicate Charge', and 'Reverse' buttons.
 - Account Actions:** 'Account Note' (unchecked), 'Billing Indicators' (checked), 'Send Letter' (unchecked), and 'Stop Bills' (unchecked).
- A warning message: '? Tx actions will only be performed on active transactions. All actions will reopen closed accounts.'
- Buttons: 'Continue' and 'Cancel'.



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 "Discount Source", there is an information icon. The "Discount Percent" field shows "0.00" with a calculator icon. The "Reason" field contains "Patient Satisfaction" and has a search icon on the right.

User Productivity Tracking



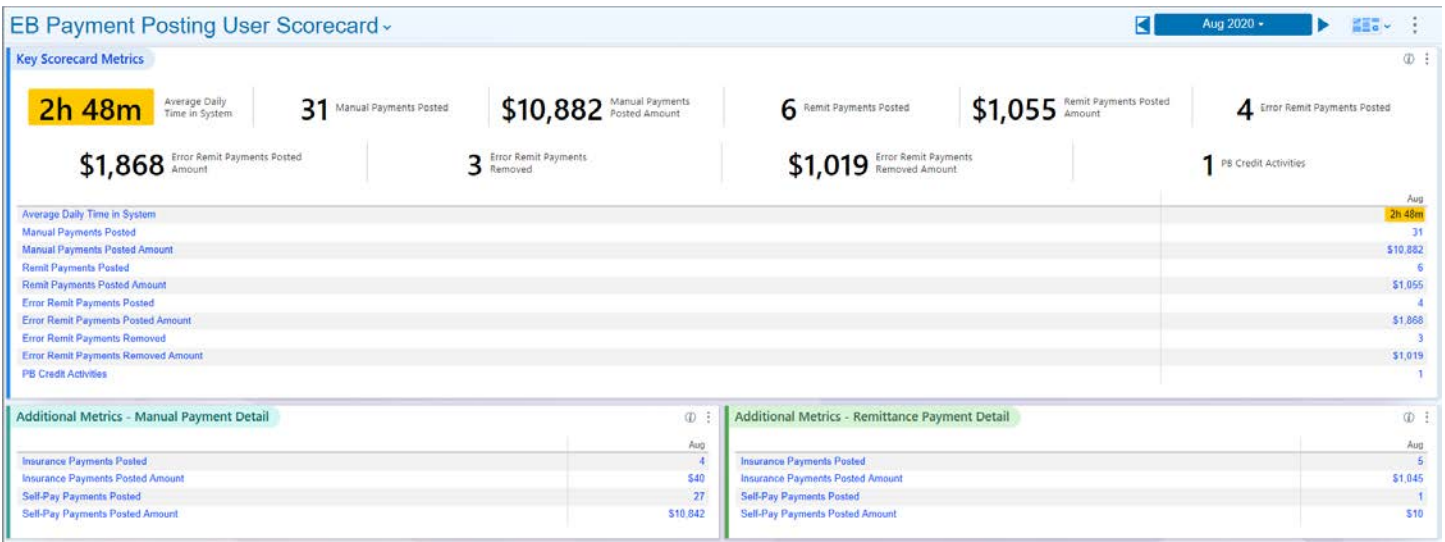
Payment Posters Can View Their Own Metrics with EB Payment Posting User Scorecard

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



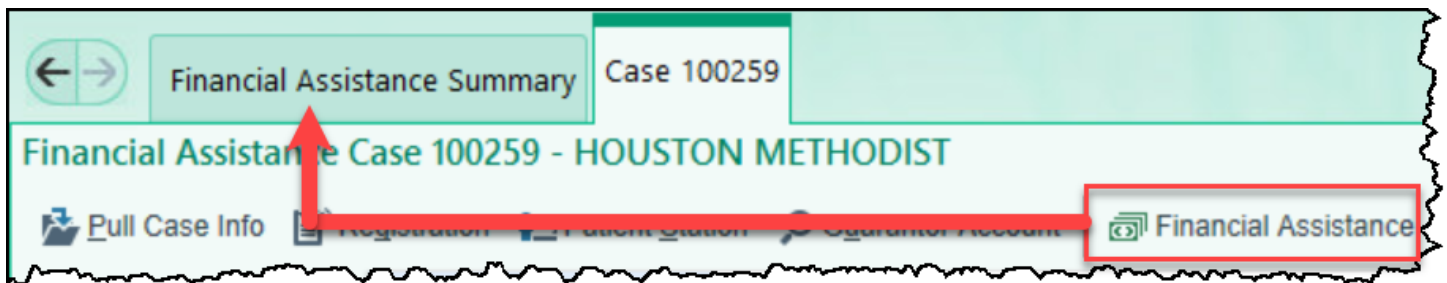
Save Time with New Financial Assistance Toolbar Button

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.





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.

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



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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](#)

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

July 1, 2021
Date

*Signature



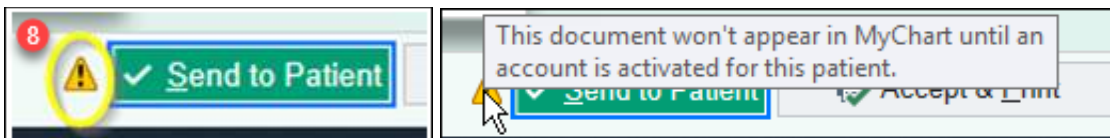
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Documents


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	-	- -

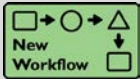
Double-click to acquire/view a document



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 needing to go to the **MyChart Administration** activity.

How to:

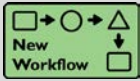
1. Click the pencil icon in the **Patient Contacts** form.

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 'Cadence, Spouse' with relationship 'Spouse' and home phone '713-898-7788'. A pencil icon in the right-hand corner of the 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 divided into two columns. The left column contains fields for City (or ZIP), State, County, Country, Same household?, Home Phone, Work Phone, Mobile Phone, Primary, Email, Occupation, Notify on admission?, Authorized letter recipient?, and Send letters by default?. The right column contains fields for Preferred, Spoken, Written, Interpreter needed?, Hearing impaired?, Visually impaired?, Hearing/visual needs, and Special needs. Below these fields is a section titled 'MyChart Proxy Access To Self' with a sub-section 'Spouse Cadence's MyChart Status: No MyChart account attached'. Underneath, there are two radio buttons: 'Proxy Access' and 'No Proxy Access'. The 'Proxy Access' radio button is selected and highlighted with a red box. At the bottom right of the form are 'Accept' and 'Cancel' buttons.





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.





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.

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

Coverage Documents

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

