

# HUDDLE NOTES

## Oct. 24 Epic Update – Billing (HB, SBO, PO)

September 22, 2021

### Oct. 24 Epic Update Preparation

- Our next Epic Update will take place on **Sunday, Oct. 24**. This will include features and enhancements to improve safety and quality of patient care, productivity and financial outcomes.
- **Update Companions** are now available for review. **These 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.
- Easy 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/](http://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 a.m. to TBD on Sunday, Oct. 24** 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 Billing

The most significant changes for your role with the Aug. 15 Epic Update include:

#### HB CBO

- Status Summary Activity tab moving permanently to Storyboard.
- Prebilled charges appear in a more appropriate phase in a bundled episode.
- Filter payments and adjustments in TX inquiry.

#### SBO

- Status Summary Activity Tab Moving Permanently to Storyboard.
- Show Estimates in MyChart.
- Filter Payments and Adjustments in Tx Inquiry. New Option When Unlinking Patient Records.

#### PO CBO

- Changes with Edit Visit Coverages.
- Editing Words or Phrases.
- View Claim History in Claim Edit Assistant.
- Closing Accounts in Credit Workqueue.
- Demand Claim from the Follow-up Workqueue.



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

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

