# HUDDLE NOTES

## March 6 Epic Update – Billing (HB/SBO/PB)

February 7, 2022

## March 6 Epic Update Preparation

- Our next Epic Update is rescheduled for **Sunday, March 6**. This includes 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.

- *Companions* are easy to find, easy to use:

    - Epic Learning Home (press **F1** on your keyboard) while logged in to Epic.

    - IT website ([it.houstonmethodist.org/epicupdate/](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](Epic Playground Logins guide).

- Planned Epic Downtime from **2-3:30 a.m. Sunday, March 6** for the Epic Update. Follow your standard [downtime instructions](downtime instructions).

- Visit the [Epic Update web page](Epic Update web page) ([it.houstonmethodist.org/epicupdate/)](it.houstonmethodist.org/epicupdate/) for regular updates and resources.

## Top Changes for Billing

The most significant changes for your role with the Feb. 13 Epic Update include:

### HB CBO Staff
- New Look for Liability Buckets Activity.
- Updated Correspondence List.
- Visual Updates to WQ Filters and Rule Logic Editor.
- Account Maintenance Toolbar Gets Some Maintenance.
- Claim Errors Registration Links Updated.

### HB CBO Leadership
- Access Account Query and Liability Bucket Query Reports from Reporting Workbench.
- New Look for Liability Buckets Activity.
- Visual Updates to Workqueue Filters and Rule Logic Editor.
- Account Maintenance Toolbar Gets Some Maintenance.
- Updated Correspondence List.

### SBO Staff

- Guarantor Account Maintenance Redesigned.
- Access Account Query and Liability Bucket Query Reports from Reporting Workbench.
- New Look for Liability Buckets Activity.
- Visual Updates to Workqueue Filters and Rule Logic Editor.
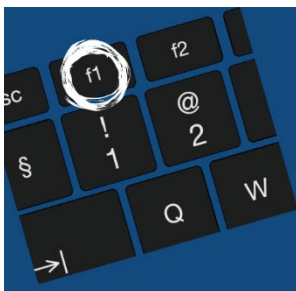- Updated Correspondence List

### SBO Leadership

- Guarantor Summary Redesigned.
- Access Account Query and Liability Bucket Query Reports from Reporting Workbench.
- New Look for Liability Buckets Activity.
- Visual Updates to Rule Logic Editor.
- Guarantor Account Maintenance Redesign.

### PO CBO Staff

- RTE Responses Get a Refresh.
- Guarantor Look Up Has a New Look.
- Updated Guarantor Account Note.
- New Look and Workflows for Correspondence.
- Batchless Adjustment Posting and Post Debit Adjustment Workflow.

### PO CBO Leadership

- Guarantor Account Merge.
- Guarantor Look Up has a New Look.
- Updated Guarantor Account Note.
- User Scorecards Include All Billing Activities Performed by Staff.
- PB User Activity Summary Report is now 41100-EB User Productivity.

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

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