

# Epic Update Companion September 17, 2023



## Community Connect Template Builders and Administrators

Updated: 9/7/23

On **Sunday, Sept. 17**, 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:

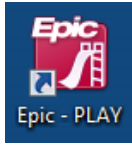
- **Template Builder**
- **Administrator**

## Top Changes for Your Role:

1. [Slot Selection Bubble's New Look](#)
2. [Quickly Add or Delete Multiple Template Exceptions Right from the Snapboard, View Schedules or Book It](#)
3. [Investigate the Template Exceptions Summary from Reporting Workbench](#)
4. [Visit Type Modifiers Have a New Look and Feel](#)



*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.*



## Guided Playground Practice

*Exercises to help you prepare for the coming changes.*

After reviewing this document, use it as a guide to see the new features for yourself in the Epic Playground. Playground practice helps you prepare for the update, so you can stay focused on patient care. Find instructions to launch the Epic Playground [here](#).

Playground User ID: **CADTEMPO0**

Playground Password: **train**

Workflows for you to practice include:

- Create and view the template for Molly Aberdeen.
- Add or delete slots in Molly Aberdeen's template.

## Template Builders



### Slot Selection Bubble's New Look

#### Key Benefit:

- Improved workflow

#### Description:

The slot selection bubble has a new look. Each action still functions the same way, but the actions are now organized into sections, instead of hidden under an action button.

The sections are:

- Slot:** Allows supervisors to change openings, overbooks and public/private status.
- Blocks:** Allows supervisors to change the type and count of blocks. Note that counts display with a "-" if there are multiples of the same block type with different counts.
- Held Time:** Allows supervisors to add, edit or remove **Held Time**.
- Unavailable Time:** Allows supervisors to add, edit or remove **Unavailable Time**.
- Messages:** Allows supervisors to add, edit or remove provider messages.

The screenshot displays the Epic Scheduler interface for a specific day and time. A slot selection bubble is open for the 'CHEMO INFUSION EMC, NURSE THREE' slot, showing a range of 12:00 PM to 3:15 PM (195 min). The bubble is divided into several sections:

- Slot:** Shows 'Openings' (3) and 'Overbooks' (1) with 'Public' and 'Private' status options.
- Blocks:** Lists 'Px Start' (count 2) and 'Px Continue' (count 2) with 'Add Block', 'Save', and 'Restore' buttons.
- Held Time:** Includes a 'Provider Request' section with an 'Edit Time' button.
- Unavailable Time:** Includes a 'Lunch' section with an 'Edit Time' button.
- Messages:** Includes an 'Add Message' button and a message: '3:00 PM: Potentially delayed at this time. Covering another room.'

The background shows a grid of time slots for three different rooms: 'CHEMO INFUSION EMC, DRAW ROOM' (0%), 'CHEMO INFUSION EMC, NURSE ONE' (30%), and 'CHEMO INFUSION EMC, NURSE THREE' (0%). Each slot contains a list of activities with their respective counts and times.





## Quickly Add or Delete Multiple Template Exceptions Right from the Snapboard, View Schedules or Book It

### Key Benefit:

- Time saver

### Description:

With the new **Add Template Exceptions** and **Delete Template Exceptions** right-click menu options, you can quickly apply exceptions across multiple days without leaving your preferred scheduling activity. The new options are available in the right-click menu of the provider header in **Book It** schedule view, web **Snapboard** and **View Schedules**.

### How to:

1. Right-click in the provider header to open the **Add Template Exceptions** and **Delete Template Exceptions** activities on the **Snapboard**.
2. The exceptions can be added to a whole day or a specific time. They can be applied to a single day, multiple days or to a recurring series of days. For example, if a provider has a standing meeting on Thursdays from 2-3 p.m., for three weeks, the scheduler can reserve that time on the schedule from the **Add Exceptions** activity and apply it to the three Thursdays once, instead of having to edit the specific slots to be unavailable on each affected day.

**Snapboard: Clinic - Family Medicine (Fri 4/7/2023) (Last refresh 8m ago)**

Clinic - Family Medicine ECAH - Therapy

	Physician Family Medicine, MD EMC FAMILY MEDICINE	Pa Family Medicine, PA EMC FAMILY MEDICINE	Np Family Medicine, NP EMC FAMILY MEDICINE
7a			
8a		1	
9a		1	
10a		1	1
11a		1	1
12p			0

Context Menu:

- Reassign Template
- Edit Template for Single Day
- Session Limits Usage
- Template Exceptions Report
- Provider Messages
- Copy Template Day
- Add Template Exceptions**
- Delete Template Exceptions





## Investigate Template Exceptions Summary from Reporting Workbench

### Key Benefit:

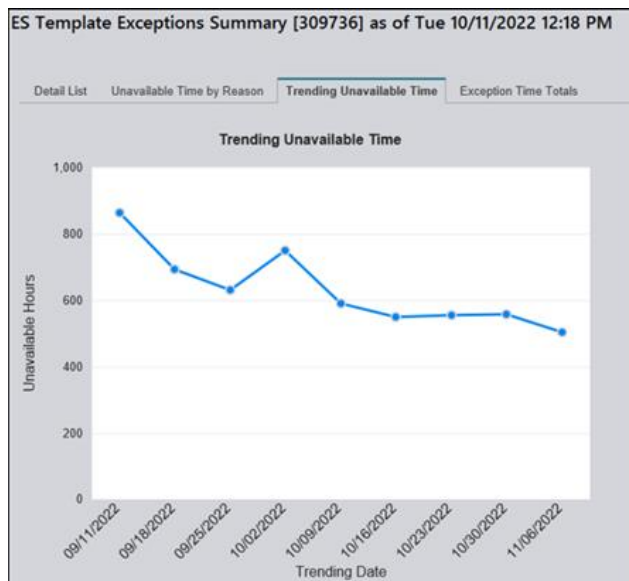
- Improved workflow

### Description:

Use the new **Template Exceptions Summary** report template instead of the retired **Crystal** report.

### How to:

1. Run the **Template Exceptions Summary** report from **Reporting Workbench** to visualize the unavailable and held time on provider templates.



Line graph showing the trending unavailable time for an organization at the system level.

# Community Connect Template Builders and Administrators

## Sept. 17, 2023 Epic Update Companion



### Preview How a Pattern Will Affect a Provider's Schedule

#### Key Benefit:

- More efficient

#### Description:

To see what their pattern will look like in the real world and to help avoid making unintentional changes to a provider's template, template builders and analysts can now preview a pattern before applying it in the **Provider Pattern** activity. The preview on the right side of the screen shows the information for the pattern selected on the left side of the screen. The pattern preview shows the following relevant information from the selected pattern.

- Day of the week (only for weekly patterns)
- Time range of slots
- Length of slots
- Open and Overbook slots
- Private slots
- Blocks
- Unavailable reason

**Provider Pattern: FAMILY MEDICINE, PHYSICIAN**

[Edit Template](#)
[Delete Template](#)
[Defaults](#)
[Exceptions](#)
[Reassign](#)
[Summary](#)
[Calendar](#)
[Edit Session Limits](#)
[Edit Pattern](#)
[Provider](#)
[Messages](#)
[Copy Template](#)

PM
**FAMILY MEDICINE, PHYSICIAN**
 Show past date ranges
   
 EMC FAMILY MEDICINE

Date Range: 6/21/2023 - 8/2/2023
   
 Status: ⚠ Changes Not Applied
   
 Auto-Extend:  Off

Base Weekly Pattern: PRIMARY CARE M-F 8-5

Single-Day Override Pattern: GENERAL 9-6 WITH BLOCKS [31]
   
 Week of Month: Every Week
   
 Day: Tuesday

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**Weekly Pattern Preview: PRIMARY CARE M-F 8-5**

Day	Time Range	Length	Open/Ovb	Private	Block	Unavailable
Monday	8:00 AM - 9:00 AM	15	1/0		Same Day (1)	
	9:00 AM - 9:30 AM	15	1/0		New Patient (1)	
	9:30 AM - 10:30 AM	15	1/0		Physical (1)	
	10:30 AM - 11:00 AM	15	1/0		Well Child (1)	
	11:00 AM - 12:00 PM	15	1/1			
	1:00 PM - 2:00 PM	15	1/0		New Patient (1)	
Tuesday	2:00 PM - 3:00 PM	15	1/1			
	3:00 PM - 4:00 PM	15	1/0			
	4:00 PM - 5:00 PM	15	1/0			
	8:00 AM - 9:00 AM	15	1/0		Same Day (1)	
	9:00 AM - 9:30 AM	15	1/0		New Patient (1)	
	9:30 AM - 10:30 AM	15	1/0		Physical (1)	
Wednesday	10:30 AM - 11:00 AM	15	1/0		Well Child (1)	
	11:00 AM - 12:00 PM	15	1/1			
	1:00 PM - 2:00 PM	15	1/0		New Patient (1)	
	2:00 PM - 3:00 PM	15	1/1			
	3:00 PM - 4:00 PM	15	1/0			
	4:00 PM - 5:00 PM	15	1/0			
Thursday	8:00 AM - 9:00 AM	15	1/0		Same Day (1)	
	9:00 AM - 9:30 AM	15	1/0		New Patient (1)	
	9:30 AM - 10:30 AM	15	1/0		Physical (1)	





## Visit Type Modifiers Have a New Look and Feel

### Key Benefit:

- Improved workflow

### Description:

The **Visit Type Modifiers** form has been redesigned, so administrators can easily search for existing modifiers and add new modifiers. All the information can be edited from one screen, instead of having to open the modifier editor for each bucket on a second screen. A search feature allows administrators to quickly view existing modifiers for visit type, provider and department combinations. It's also clearer when you're editing a default modifier, which reduces the likelihood of unintended changes to a visit type's default modifiers.

### All of a Modifier's Details Appear at a Glance

On the left half of the screen, the current list of existing modifiers for a visit type or provider appears, with the right half of the screen appearing blank until a modifier is selected from the table or a new modifier is added. Each row in the table represents a modifier and shows the relevant information for that modifier in sortable columns, including:

- The visit type or provider the modifier specifies.
- The department the modifier specifies.
- The sex of the patients included in the modifier.
- The age range of the patients included in the modifier.
- If the modifier allows scheduling.
- The visit length modification.
- If the modifier changes instructions.
- If the modifier includes date range exceptions.

The screenshot shows the 'Modifiers' form interface. At the top, there are search fields for 'Visit Type' and 'Department', along with an 'Add Modifier' button. Below these is a table with the following columns: Visit Type, Department, Sex, Age Range, Allowed?, and Length. The table contains six rows of modifiers for 'WELL CHILD' visit types with various durations (1 month to 1 year) and age ranges. To the right of the table is a large, light-colored area with a stylized 'S' logo and the text: 'Select a modifier on the left to edit. Enter a Visit Type or Department to filter modifiers.' At the bottom left, there is a 'Copy all modifiers from another provider' button.

Visit Type	Department	Sex	Age Range	Allowed?	Length
WELL CHILD - 1 MONTH [715]	EMC FAMILY MEDICINE [10501...	Any	0 dys - 45 dys	✓	30
WELL CHILD - 2 MONTHS [716]	EMC FAMILY MEDICINE [10501...	Any	46 dys - 75 dys	✓	30
WELL CHILD - 4 MONTHS [717]	EMC FAMILY MEDICINE [10501...	Any	3 mos - 4 mos	✓	30
WELL CHILD - 6 MONTHS [718]	EMC FAMILY MEDICINE [10501...	Any	5 mos - 7 mos	✓	30
WELL CHILD - 9 MONTHS [719]	EMC FAMILY MEDICINE [10501...	Any	8 mos - 10 mos	✓	30
WELL CHILD - 1 YEAR [720]	EMC FAMILY MEDICINE [10501...	Any	11 mos - 1 yrs	✓	30

The new appearance of the **Modifiers** form.



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### Search Filtering and Add Modifier

It's now easier to find whether a modifier exists for combinations of visit types, providers and departments, particularly in cases where single visit types can have many modifiers.

Use the **Department and Provider** search bars in the **Visit Type Master File Edit** activity and the **Visit Type** and **Department** search bars in the **Provider Master File Edit** activity to filter modifiers that exist for that visit type or provider.

Once you specify a visit type and optionally a department in the **Provider Master File Edit** activity or a department or provider in the **Visit Type Master File Edit** activity, you can click **Add Modifier** to create a new modifier.

Visit Type	Department	Sex	Age Range	Allowed?	Length
WELL CHILD - 1 MONTH [715]	EMC FAMILY MEDICINE [10501...	Any	0 dys - 45 dys	✓	30
WELL CHILD - 2 MONTHS [716]	EMC FAMILY MEDICINE [10501...	Any	46 dys - 75 dys	✓	30
WELL CHILD - 4 MONTHS [717]	EMC FAMILY MEDICINE [10501...	Any	3 mos - 4 mos	✓	30
WELL CHILD - 6 MONTHS [718]	EMC FAMILY MEDICINE [10501...	Any	5 mos - 7 mos	✓	30
WELL CHILD - 9 MONTHS [719]	EMC FAMILY MEDICINE [10501...	Any	8 mos - 10 mos	✓	30
WELL CHILD - 1 YEAR [720]	EMC FAMILY MEDICINE [10501...	Any	11 mos - 1 yrs	✓	30

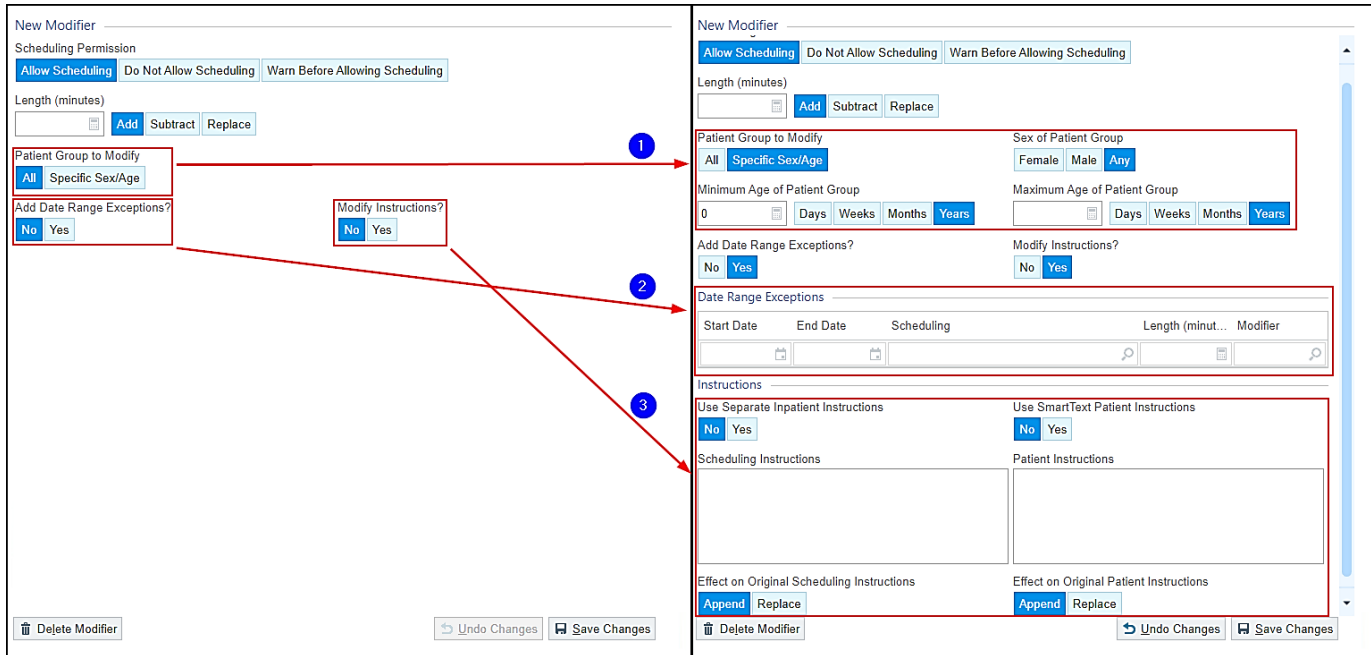
Visit Type	Department	Sex	Age Range	Allowed?	Length
WELL CHILD - 9 MONTHS [719]	EMC FAMILY MEDICINE [10501...	Any	8 mos - 10 mos	✓	30

Left side of the **Modifiers** form before filtering by visit type (left) and after filtering (right).

### Editing a Modifier

The modifier editor appears on the right half of the screen when you either click on an existing modifier in the table or click **Add Modifier** to create a new modifier. To make it easier to find the patient group or bucket that the modifier applies to, the patient group appears on the right half of the screen.

When creating a modifier, you'll see the most common options and can click **Specific Sex/Age** for **Patient Group to Modify** and **Yes** for **Add Date Range Exceptions?** and **Modify Instructions?** to expand more fields to change those options.



Modifier edit side of the screen as it appears when initially adding a modifier (left) and after expanding (right) **Patient Group to Modify**, **Add Date Range Exceptions?** and **Modify Instructions?**



# Community Connect Template Builders and Administrators

## Sept. 17, 2023 Epic Update Companion

### Default Modifiers

To make it more difficult to accidentally create default modifiers when trying to create a modifier for a provider or department in the **Visit Type Master File** activity, default modifiers now appear at the bottom of the screen on the **Modifiers** form and are no longer combined in the same list as provider and department modifiers. Creating and editing default modifiers works the same way as creating and editing provider and department modifiers, with the exception that specifying a department or provider isn't necessary.

Modifiers

Department  Provider  [+ Add Modifier](#)

Department	Provider	Sex	Age Range	Allowed?	Length
JUNO S FAMILY PRACTICE [3...	GARCIA, MARIA [4050]	Any	0 yrs - 17 yrs	✓	+ 15
JUNO S FAMILY PRACTICE [3...	GARCIA, MARIA [4050]	Any	65 yrs +	✓	+ 15
JUNO N FAMILY PRACTICE [3...	GARCIA, MARIA [4050]	Any	0 yrs - 17 yrs	✓	45
JUNO N FAMILY PRACTICE [3...	GARCIA, MARIA [4050]	Any	65 yrs +	✓	45
VTM FAMILY MEDICINE [2200...	JOHNSON, VINCENT [4051]	Any	18 yrs - 65 yrs	✓	30
VTM FAMILY MEDICINE [2200...	AHMED, JAMAL [4052]	Any	All	✓	45
VTM CLINIC [2200029647]	AHMED, JAMAL [4052]	Any	All	✓	45
JUNO S FAMILY PRACTICE [3...	AHMED, JAMAL [4052]	Any	All	✓	45
JUNO N FAMILY PRACTICE [3...	AHMED, JAMAL [4052]	Any	All	✓	45
VTM FAMILY MEDICINE [2200...	ROBERTSON, EMMA [4055]	Any	0 yrs - 17 yrs	✓	+ 15
VTM FAMILY MEDICINE [2200...	ROBERTSON, EMMA [4055]	Any	18 yrs +	✓	

Default Modifiers [+ Add Default Modifier](#)

Sex	Age Range	Allowed?	Length
Any	0 yrs - 17 yrs	✓	+ 15

Item to use when patient sex cannot be reliably determined:

Edit Modifier [M-6993]

Scheduling Permission  
 Allow Scheduling  Do Not Allow Scheduling  Warn Before Allowing Scheduling

Length (minutes)  
 [Add](#) [Subtract](#) [Replace](#)

Patient Group to Modify

Sex of Patient Group

Minimum Age of Patient Group

Maximum Age of Patient Group

Add Date Range Exceptions?

Modify Instructions?

[Delete Modifier](#) [Undo Changes](#) [Save Changes](#)

The **Modifiers** form from **Visit Type Edit**, where default modifiers appear beneath provider and department modifiers.

