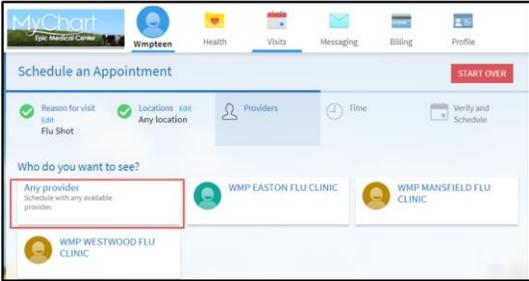
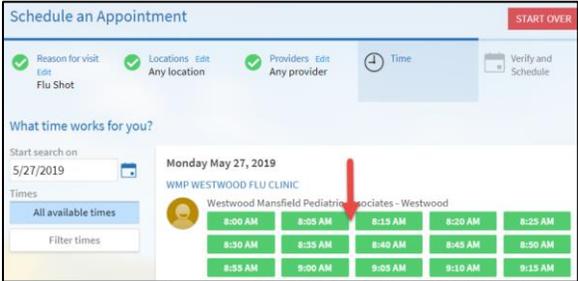


Epic - Version February 2019: Cadence and Prelude User Guide

Learning Legend:



| Topic: | Learning Category: | What's Different as of August 14, 2019? |
|--|---------------------------|--|
| MY CHART ENHANCEMENTS | | |
| <p>Flu Shot Scheduling Now Available Through MyChart</p> | <p>New Feature</p> | <ul style="list-style-type: none"> - Patients and Proxies can now schedule their Flu Shots directly from MyChart! In addition to being able to schedule sick and well visits right from MyChart, patients/proxies will now be able to schedule their flu shots as well! Patients/Proxies will now have an option that says "Flu Shot" when scheduling their appointments directly from MyChart. ATTENTION, TEMPLATE BUILDERS: You must add a visit type of "MyChart Flu" to your existing "Flu Clinic" Templates or your patients/proxies will not see this fantastic new flu option from MyChart. <div style="display: flex; justify-content: space-around;">   </div> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Template builders, don't forget to must add a visit type of "MyChart Flu" to your "Flu Clinic" template!</p> </div> |
| <p>New language added to</p> | <p>New Feature</p> | <ul style="list-style-type: none"> - Proxies of Patients 13 and older will now see a message explaining why they can't see the |



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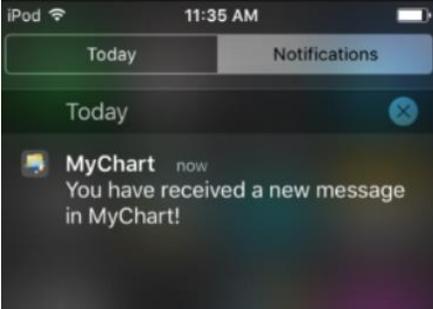
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| <p>MyChart Message to Proxies of 13+ Children</p> | | <p>appointment they just booked for their child through MyChart. After scheduling the visit through MyChart, the message that proxies of patients 13 and older will now see is “Due to adolescent confidentiality, proxies of patients over age 13 are not able to view upcoming scheduled appointments via MyChart. Because of this, you will not be able to see the appointment information once you have booked an appointment via MyChart. The PATIENT (not the proxy) will be able to see the details of all of their upcoming appointments via THEIR MyChart account.”</p> <div data-bbox="835 407 1948 716" style="border: 1px solid #ccc; padding: 10px;"> <p>Appointment Scheduled (Maddie)</p> <p>Thanks, the appointment is scheduled for Maddie Cruise!</p> <p>Due to adolescent confidentiality, proxies of patients over age 13 are not able to view upcoming scheduled appointments via MyChart. Because of this, you will not be able to see the appointment information once you have booked an appointment via MyChart. The patient will be able to see the details of all of their upcoming appointments via their MyChart account.</p> <p style="text-align: center;">BACK TO THE HOME PAGE</p> </div> | | | | |
| <p>New descriptive language added to visit types in MyChart</p> | <p>New Look</p> | <p>- In an effort to help patients/proxies determine what type of visit they wish to schedule via MyChart, we have added language underneath each visit type on the “Tell Us Why You’re Coming In” screen. For example, under “Sick Visit,” it now says “A visit for a sudden illness or injury” and under “Well Visit,” there is more detailed language as well.</p> <div data-bbox="835 862 1709 1326" style="border: 1px solid #ccc; padding: 10px;"> <p style="text-align: center;">Tell us why you're coming in Choose a specific reason for scheduling an appointment.</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 50%; padding: 5px;"> <p>Sick Visit for Acute problem A visit for a sudden illness or injury.</p> </td> <td style="width: 50%; padding: 5px;"> <p>Well Visit (Annual Physical/Check-Up) A routine Well Child visit. Typically: Newborn, 1 mo, 2 mo, 4 mo, 6 mo, 9 mo, 12 mo, 15 mo, 18 mo, 24 mo, 30 mo, 1 per yr age 3 and over. (as recommended by the American Academy of Pediatrics)</p> </td> </tr> <tr> <td style="padding: 5px;"> <p>Flu Shot A visit to receive a flu shot.</p> </td> <td style="padding: 5px;"> <p>Request an Appointment Please use this to request a visit that is not listed here (routine office visit, nurse visit, etc).</p> </td> </tr> </table> </div> | <p>Sick Visit for Acute problem A visit for a sudden illness or injury.</p> | <p>Well Visit (Annual Physical/Check-Up) A routine Well Child visit. Typically: Newborn, 1 mo, 2 mo, 4 mo, 6 mo, 9 mo, 12 mo, 15 mo, 18 mo, 24 mo, 30 mo, 1 per yr age 3 and over. (as recommended by the American Academy of Pediatrics)</p> | <p>Flu Shot A visit to receive a flu shot.</p> | <p>Request an Appointment Please use this to request a visit that is not listed here (routine office visit, nurse visit, etc).</p> |
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| New MyChart Push Notifications | New Feature | <ul style="list-style-type: none">- When patients have new information in MyChart, such as a message from their doctor or a new test result, they can be notified in real-time with push notifications on their mobile devices. To use push notifications, patients must update the MyChart mobile app to version 4.3.1 or higher. Push notifications in the MyChart apps work similarly to push notifications for other apps: notifications appear on the device's lock screen and/or on the top of the screen when the device is unlocked.  |
| Patients (13+) and Proxies will be notified in MyChart if change is made to their information | New Feature | <ul style="list-style-type: none">- Patients 13 and older and proxies will now be notified when the email or mobile phone number associated with their MyChart account has changed so they can follow up if they weren't the one who made the change. If the system detects a change in the Primary Email Address or Mobile Phone, the system sends an email to verify with the patient.<ul style="list-style-type: none">o If the email address was changed, the email is sent to the patient's/proxy's previous email address.o If the mobile number changed, the email is sent to the patient/proxy's email address. |
| New Opt-in Two-Factor Authentication for MyChart Users | New Feature | <ul style="list-style-type: none">- MyChart will now offer additional security for patients/proxies when they log in while respecting their preference for whether or not they would like to use it. Patients/proxies can opt in to a two-factor authentication as an additional security measure or choose not to use it if they feel comfortable without it. |

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Updated: 7/19/2019

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CADENCE & PRELUDE ENHANCEMENTS

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| <p>Internal Referrals will now auto-close after 365 days</p> | <p>New Feature</p> | <ul style="list-style-type: none"> - The PPOC is changing the default expiration date on Internal Referrals only to expand from 180 days to 365 days. This means that Internal Referrals will auto-close and fall off the appointment desk and any workqueue that they are on after 365 days. The timeframe for external (outgoing) referrals will not be changing and will still auto-close as they do now at 180 days. As a reminder, referrals will always remain in the patient's chart, regardless of status, and can always be re-opened if needed. |
| <p>New Session Limit Availability for Providers</p> | <p>New Feature</p> | <ul style="list-style-type: none"> - Template builders, take notice! If you have providers who wish to limit the number of well visits (or other visit types) that they would like to have in their template during a specific timeframe (from 8am to 1 pm, for example) this option is now available. If you would like to utilize the Session Limits feature, you MUST first contact the PPOC Service Desk to officially request the building of session limits for your practice and secondly, you MUST follow the new Visit Type Session Limits Tip Sheet that will be located under the Template Tip Sheets on the Front Desk Learning Home Dashboard. |



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| <p>Gender Identity Replacing Sex in Patient Header</p> | <p>New Feature</p> | <ul style="list-style-type: none"> - To increase patient privacy, we've simplified how sex and gender information appear in the patient header, in Patient Lists, and in the Schedule activity. If the system determines the patient is transgender based on a documented transgender gender identity, or if any of the documented sex and gender information for the patient aren't the same, the patient's binary gender (Female or Male) now appears instead of showing and highlighting the patient's transgender gender identity, such as Transgender Male-to-Female. In the patient header only, an information icon also appears in this scenario. Users can click this icon to open the Sexual Orientation and Gender Identity (SOGI) SmartForm. | |
| <p>More Accurate Wait Time Estimates</p> | <p>Workflow Change</p> | <ul style="list-style-type: none"> - Calculated wait time estimates will now include currently waiting patients. Because the new calculation includes currently waiting patients only if their wait times are longer than the historical average, it only ever makes the wait times higher. We expect these wait times to give a more accurate impression of actual wait times in your practice and help patients/families have an accurate understanding of what to expect. | |
| <p>Additional Appointment Information will now populate in the Encounters tab of Chart Review</p> | <p>New Feature</p> | <ul style="list-style-type: none"> - Cancelled appointments will now show the Cancellation Comment in the report (Chart Review > Encounter Tab > Single Click Appointment > Cancel Comments) | |

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Updated: 7/19/2019

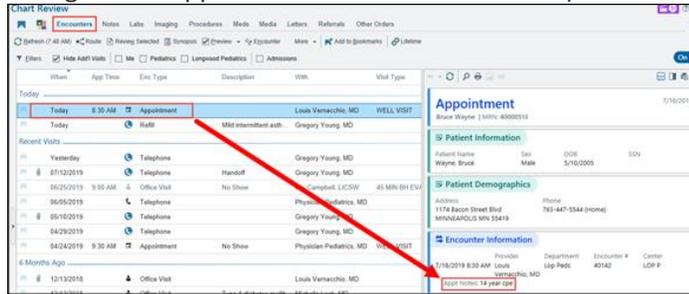
Page | 5



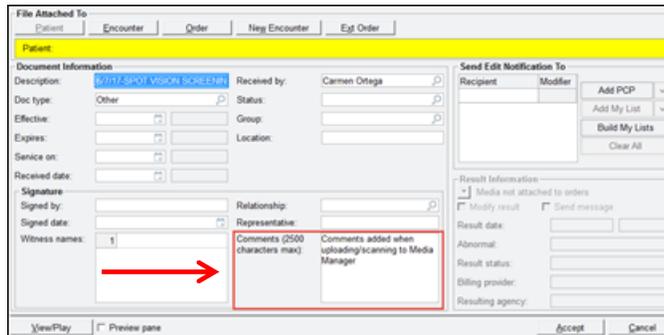
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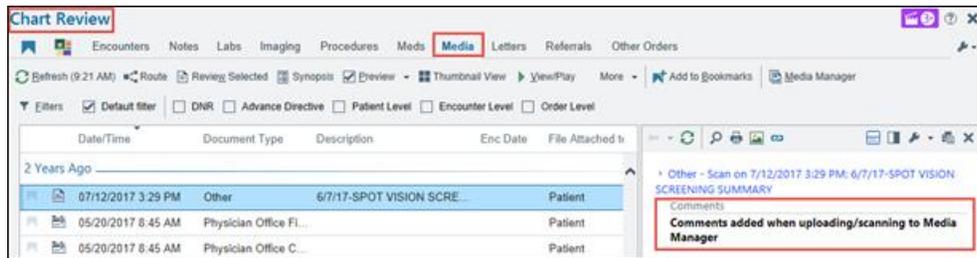
- **Future appointments** will show the Appointment Notes in the report (Chart Review > Encounter Tab > Single Click Appointment > Cancel Comments)



- Comments added during the uploading of a document to Media Manager will now appear in the **Media** tab in **Chart Review**. (Chart Review > Media > Single-click on document)
- You would enter the comments here:



- And they will populate here:



Media Manager
Comments now appear in
Chart Review

New Feature



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Communication Management Section relocated within Telephone Encounters

Workflow Change

- The **Communication Management** section (where letters are created) has been relocated to within the **Call Intake/Plan** section of **Telephone Encounters**.

Barkat, Asha
Female, 10 mo, 09/12/2018, MILTON
PCP: Abby Levine, MD
Last Well Visit: >1 year
Next Appt: None
Last Height: 22" (55.9 cm)
Last Weight: 12 lb (5.443 kg)
BMI: None
Lang: English
Allergies: Not on File
Health Maintenance
Specialty Comments:

Plan: BCBSMA
VFC Eligible: No - Has Commercial Health...
MyChart: Proxy enabled
Registries: (Chronic Disease) A
MRN: 40000846

Call Intake/Plan

References Appts Change Enc Provider/Dept

Chart Review

MyChart Msg Routing

Contacts Reason for Call Care Teams Verify Rx Benefits Medication Review Meds & Orders Problem List Visit Diagnoses History BestPractice **Comm Mgt**

Medical History
None

Surgical History
None

Sexual Activity
No Sexual Activity History On File

Family History
None

Social Documentation
No social documentation on file.

Birth History

Birth Information
Birth Length: 19" (48.3 cm)
Birth Weight: 4 lb 3 oz (1.9 kg)
Gestational Age: 32 weeks

Mark as Reviewed Never Reviewed

BestPractice Advisories
No advisories to address.

Communication Management

New Communication

Send g