

## Ambulatory APeX Monthly Update August 2025

### Ambulatory Users

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**Unless otherwise indicated, Go-Live for these changes is:**

**August 12, 2025**

## New Adult Cancer Directed Therapy e-Consent

**Audience:** Adult Oncology Providers, Nursing, and Clinical Support Staff

**Reason for Change:** To address a gap in the chemotherapy informed consent workflow and ensure full compliance with policy requirements

**Brief Description & Workflow:**

Beginning August 6, 2025, all newly initiated adult cancer-directed therapy orders for new or existing patients must meet updated documentation and consent requirements:

1. **Provider Discussion:** The Hem/Onc provider must have a documented discussion of informed consent with the patient whenever a new regimen is started or an additional cancer-directed therapy is introduced. This discussion should be recorded using the .CONSENTCANCERTHERAPY SmartPhrase. Documentation must clearly specify the therapy or therapies being addressed.
2. **Annual Signed Consent:** A signed **Consent for Cancer Directed Therapy** form is required at the start of any new cancer-directed therapy initiated on or after August 6, 2025. This consent must be renewed every 12 months.

For more guidance on the cancer directed therapy e-consent, please see:

- [Compliance Update: Informed Consent Prior to Cancer Directed Therapy Presentation](#)
- [e-Consent for Cancer Directed Therapy Tip Sheet](#)
- [Patient Signature Options for e-Consent Tip Sheet](#)
- [Guiding a Patient to an e-Consent Tip Sheet](#)

## Beaker Help Text Removed

**Audience:** All Providers and Lab Staff

**Reason for Change:** To remove alerts and information implemented to assist with Beaker go-live

**Brief Description & Workflow:** In preparation for the Beaker lab system go-live on May 31, changes were made to call attention to labs that had been canceled and would need to be reordered. Beginning August 13th, Providers and laboratory staff will no longer see alerts and information related to labs needing to be reordered for Beaker. The **\*\*REVIEW FOR REORDER\*\*** In Basket folder will revert to its old name, Canceled Orders. Providers who still have orders in this folder with an orange “Outstanding Orders Need Review” banner should resolve those messages before 8/13.

*Informaticists/SMEs: Dr. Maria Byron; Build Analyst: Amanda Saalen*

# Beaker Lookahead Time Parameter Extended

**Audience:** All Users

**Reason for Change:** This adjustment enhances the potential for bundling lab collections, streamlining patient care, and improving the efficiency of label printing and container sharing.

**Brief Description & Workflow:** The Beaker module’s lookahead time parameter for scheduled lab collections has been extended from 1 hour to 4 hours as of July 2025. There is no change to the lab collection workflow.

*Informaticist/SME: Craig Johnson, CNI; Katie O’Connor, CNI; Lindsay Bolt, CNS; Cass Sandoval, CNS; Build Analyst; Sky Aulita*

# E-Consents Updated with New Required Fields

**Audience:** Surgeons

**Reason for Change:** To align with the updated paper consents

**Brief Description & Workflow:** This update introduces new fields for obtaining consent related to education and training examinations, as well as patient authorization text that aligns with the paper consent form. Additionally, if the Consenter is not present and a Witness to the conversation signs the consent form (e.g., obtained consent via phone), a Witness Name field will appear.

Education and Training Related Examination Consent

Consent to Education/Training Related Examination

Yes

No

Not Applicable

Patient Signature

Relationship to Patient:

Self

Parent

Legal Guardian

Surrogate

Court-Ordered

Consenter is present. Parent/guardian/surrogate is signing consent form.

Consenter is not present. Witness to conversation is signing consent form.

Consenter not present. See Court Ordered Consent

Surrogate Name and Relationship to Patient

Reason Patient Unable to Sign

Witness Name

A Surrogate decision maker can be an agent appointed in an advance health care directive or a durable power of attorney for health care, or a court appointed conservator of the person. When patients without such an agent or conservator lose capacity to make health care decisions, a family member, domestic partner or persons with whom the patient is closely associated may be considered to act as surrogates related to health care decisions.

*Informaticists: Dr. Anobel Odisho & Dr. Jason Jagodzinski; Analysts: Kunal Mohindra & Vicky Luglio*

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Beaker Lookahead Time Parameter Extended

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# Updates to Chart Review Imaging Tab

**Audience:** All Users

**Reason for Change:** Currently, the Imaging tab is sorted by the Last Updated column. It was recently found that this column does not work as expected, as it doesn't always reflect the date that the order was last updated (e.g., it will show the end exam date over the date that the study resulted).

**Brief Description & Workflow:** The following updates were made to the columns in the Imaging tab of Chart Review:

- Removed the **Last Updated** column: this column has been replaced with the **End Exam** column
- Shifted the **Order Date** column to the left so that the date-related columns are grouped more closely together
- Added a **Result Date** column
- Updated the default sort to be based on the order date for the Imaging tab: previously, the Imaging tab was sorted by the Last Updated column

Chart Review

Imaging

Encounters

Labs

Micro

Pathology

Procedures

Cardiology

Other Ord

Preview

Refresh

Route

Ambra Image Storage

Filters

Hide Canceled

CT

MR

US

XR

NM

FL

John Muir Results

UCSF Re

	Ordered	End Exam	Result Date	Status	Exam Name
Today					
	Today	Today	Today	Exam Ended	NM Lymphoscintigraphy Injecti
	Today			Ordered	PETCT Rubidium Rest/Stress
Recent					
	Yesterday	Yesterday	Yesterday	Exam Ended	CT Thoracic/Lumbar Spine wit
	Yesterday	Yesterday	Yesterday	Exam Ended	CT Cervical Spine with and wit
	Yesterday	Yesterday	Yesterday	Exam Ended	CT Cervical/Thoracic Spine wi
	Yesterday	Yesterday	Yesterday	Exam Ended	CT thoracic spine with and witt

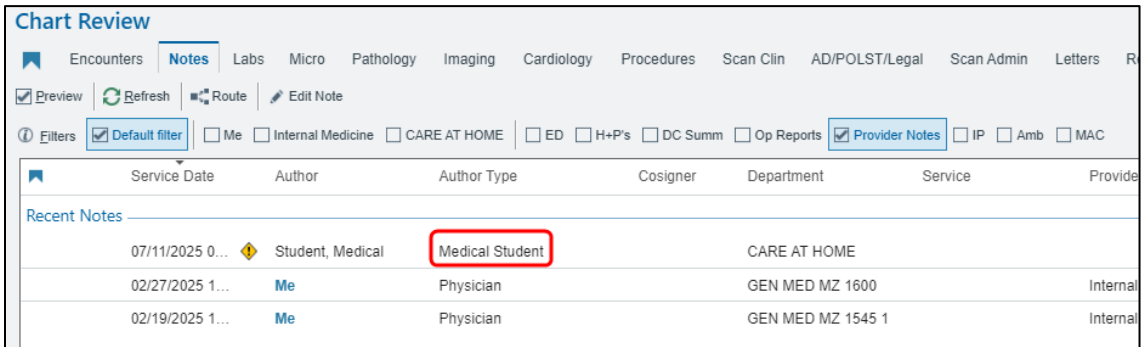
SME: Kelsey James; Build Analyst: Shyunika Bolden

# Medical Student Added as Author Type in Chart Review

**Audience:** All Users

**Reason for Change:** To improve inclusion criteria of the Provider Notes Chart Review filter

**Brief Description & Workflow:** Medical Student has been added as an Author Type and is now included in the Provider Notes filter on the Chart Review tab.



Informaticist/SME: Dr. Aris Oates; Build Analyst: Nicholas Voelker

# FYI Flag Update

**Audience:** All Users

**Reason for Change:** Some FYI Flags on patient records are no longer linked to an active workflow or purpose. These outdated flags create unnecessary clutter in the patient’s chart and can negatively affect the end user experience.

**Description & Workflow:** We are deactivating the following **FYI Flags** from *patient records* and the *FYI Flag Type* category list. These flags will no longer be available to add to patient records:

- Visitor Restriction
- Video Visit Capable
- GI Titus Patient
- Ketogenic Diet Patient: No Dextrose, No Liquid Medications, No Suspensions

End users can view inactive FYI Flags by selecting the “**Inactive**” checkbox in the FYI Flag activity. By default, inactive FYI Flags do not appear on the Storyboard or in the FYI activity.



For Visitor Restriction, please follow the dedicated workflow in Salesforce instead of using an FYI Flag.

Security Team: [Restricted Visitor Entry](#)

ED RN: [BCH MB ED Patients Visitor List for Admitted Patients](#)

Admit Staff/HUSC: [Patient Visitor List Update](#)

Informaticist/SME: Dr Aris Oates; Dr Katie Grouse; Amy Kangwankij, CNI; Build Analyst: Anne Kroeger

## MyChart Resource (Foster) Parent Proxy Access

**Audience:** BCH

**Reason for Change:** Resource (Foster) Parents do not have the ability to message providers via MyChart for children in their care.

**Brief Description & Workflow:** APeX providers, social workers, or nurses will be responsible for collecting and scanning the CPS Placement form. They will contact the CPS Placement Worker to verify the information and place an order requesting MyChart proxy access for the Resource (Foster) Parent. Orders can be placed through an Orders Only or Ambulatory encounter by utilizing the MyChart Resource (Foster) Parent Proxy Access Request SmartSet or searching for the order in the task bar. An In Basket message will be routed to the MyChart team for verification and creation of the MyChart account. The Resource (Foster) Parent access will be restricted to messaging only and will require review every four months.

The screenshot shows a web form titled "MyChart Resource (Foster) Parent Proxy Access". At the top, it states: "This Smartset is used to request add/remove proxy access for a Resource (Foster) Parent". Below this is a section for "Required Documentation" with a sub-section "MyChart Resource (Foster) Parent Proxy Documentation". A checkbox labeled "MyChart Resource (Foster) Parent Proxy Access Request" is checked. To the right of this checkbox are "Accept" and "Cancel" buttons. Below the checkbox is a "Process Instructions" box containing text about generating a request to the MyChart team and the requirement for the parent to be registered. Below the instructions are several required fields, each marked with a red circle containing an exclamation mark: "Full Name of Resource Parent requesting access" (with two input boxes), "Phone number of Resource Parent requesting access?" (with two input boxes), "I have confirmed a CPS placement document is scanned into the EPIC Chart documenting placement with this Resource Parent" (with "Yes" and "No" radio buttons), "Date of Expiration of placement (if available):" (with a date picker), "I have spoken to the CPS Social Worker to confirm this placement information is correct" (with "Yes" and "No" radio buttons), and "Name of CPS Social Worker" (with two input boxes). At the bottom left, there is a "Class:" label and a "Normal" button. At the bottom right, there are "Accept" and "Cancel" buttons. A red box highlights the "Accept" button at the bottom right.

Review the [MyChart Foster Parent Proxy Access](#) Tip Sheet for more information.

*Informaticist/SME: Dr. Aris Oates; Build Analyst: Kathy Lehto (MyChart), Tara Crandall (Ambulatory)*

## Pediatric HIV OPA Alert Replaced with HM Care Gap

**Audience:** BCH

**Reason for Change:** To replace HIV OurPractice Advisory (OPA) alert with a Health Maintenance (HM) Care Gap

**Brief Description & Workflow:** For patients aged 15-17.9 years, the Care Gap will trigger:

- Every 6 months if patient chart has documentation or lab orders indicating they are sexually active
- Only once if patient chart does not have documentation indicating they are sexually active

*Informaticist/SME: Dr. Newman; Build Analyst: Erik Stewart*

## New Transgender Organ Inventory Care Gap

**Audience:** All Users

**Reason for Change:** To replace an alert that was lost with recent APeX update

**Brief Description & Workflow:** A new annual Transgender Organ Inventory Care Gap will trigger if patient meets criteria:

- Age is 18 years or older
- Legal sex is nonbinary or unknown
- Patient has a gender identity of transgender, nonbinary/gender queer, or other
- Legal sex does not match gender identity
- The organ inventory review flag is true

The Care Gap will include organ inventory information that captured on the SOGI SmartForm.

The screenshot displays the 'Health Maintenance' window. On the left, a list of 'Current Care Gaps' includes 'eGFR Creatinine Screening for CKD', 'Hepatitis B Routine Screening', 'Transgender Organ Inventory (validate naming)', 'Cervical Cancer Screening (Combo T...)', 'Hypertension: CKD Microalbumin Scr...', 'Cervical Cancer Screening', 'HPV Vaccines (1 - 3-dose series)', 'Tdap Immunization', 'Td Immunization', and 'Tobacco Screening'. The 'Transgender Organ Inventory (validate naming)' item is highlighted. On the right, a yellow warning box states: 'Patient may be transgender, non-binary, or gender expansive. Please consider adding the appropriate care gaps. Click to edit SOGI related data'. Below this, the 'Transgender Organ Inventory (validate naming)' care gap is shown with a 'Due: Once' status and a 'Never done' indicator. Patient details on the far right show 'Age 28 years' and 'Gender Identity Transgender Male'. A note at the bottom explains: 'Transgender Care Gap - will alert when birth sex and current gender are selected are different or patient selected a response of transgender male'.

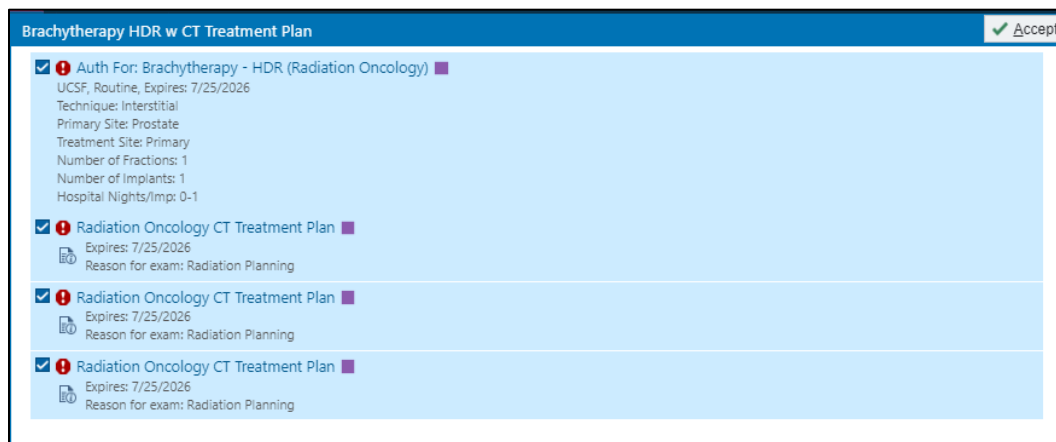
*Informaticist/SME: Dr. Nicole Appelle, Dr. Maddie Deutsch; Analyst: Terry Mayo*

## Updated Brachytherapy HDR w CT Treatment Plan Order Set

**Audience:** Outpatient Radiation Oncology ordering users

**Reason for Change:** To improve ordering convenience

**Brief Description & Workflow:** Two additional copies of RADIATION ONCOLOGY CT TREATMENT PLAN [IMG2497] order have been added to the Brachytherapy HDR w CT Treatment Plan order set. They're defaulted to be selected and answers to the order questions on one CT order pulls forward to the others.



Build Analyst: Yifang Nie

## APeX Beacon Oncology Provider Classes Now by Request

**Audience:** UCSF Beacon Oncology Providers

**Reason for Change:** To better utilize APeX Training resources

**Brief Description:** Beacon Oncology **Adult & Pediatric Provider** classes have been transitioned to by request only as of 7/8/2025.

To request this class for providers, please visit: [APeX Beacon Oncology Provider Training](#).

For any questions, please email [APeX Training](#).

## Referral Standardization

**Audience:** All Users

**Reason for change:** To standardize and consolidate referrals for ease of user lookup and system maintenance.

**Brief Description & Workflow:** The referral standardization team is working with various groups to improve referrals. The referral standardization will be an ongoing effort with multiple specialty referrals going live each month.

**Referrals and Go-Live Dates:** All referrals listed below are going live on August 12, 2025.



## Updated referrals:

- Referral to Palliative Care & Subspecialties [REF261]

## Related referrals being deactivated:

- AMB REFERRAL TO PALLIATIVE CARE AFFILIATE [REF271]
- AMBULATORY REFERRAL TO SYMPTOM MANAGEMENT SERVICE (PALLIATIVE CARE FOR PATIENTS WITH CANCER, SMS) [REF255]
- DISCHARGE REFERRAL TO PALLIATIVE CARE (NON-CANCER PATIENTS) [REF3261]
- DISCHARGE REFERRAL TO SYMPTOM MANAGEMENT SERVICE (PALLIATIVE CARE FOR PATIENTS WITH CANCER, SMS) [REF3106]

## Referral Improvements include:

- Consolidation of referrals by specialty, subspecialty, discharge, and different referrals based on location (UCSF, BCH Oakland, MarinHealth, etc.)
- Standardization of referral workspace
- Includes enhanced feature: sidebar guidance with instructions of when and how to get the patient referred
- Improves the referral and decision tree workflow



**Note:** Locate referral orders by searching “Referral To” without additional qualifiers such as “Amb” or “Discharge”

Review the [Referrals to Specialty Standardization](#) Tip Sheet for more information about the referral standardization efforts.

Informaticist/SME: Laura Hill-Sakurai, MD, Nicole Ling, MD, Lisa DeAngelis and Specialty SMEs; Analyst: Ambulatory and Patient Access Teams

## Reporting Office Hours

APeX Reporting Team members and EIA are hosting Office Hours monthly. Get answers to your questions on APeX Reporting content and workflows, and Tableau Dashboards. This is a forum to provide end users with immediate training support, there is no set agenda, however we do provide a Reporting Tip each session. Below is the upcoming schedule for Office Hours:

[APeX Reporting Office Hours Meeting Link](#)

Date	Time
August 7, 2025	12:10 pm - 1:00 pm
August 21, 2025	12:10 pm - 1:00 pm
September 4, 2025	12:10 pm - 1:00 pm
September 18, 2025	12:10 pm - 1:00 pm

## Audience Legend

**All Users:** All APeX Ambulatory Users at any location

**MarinHealth:** UCSF MarinHealth Clinics

**Community Affiliates:** Community Clinics that use APeX

**UCSF:** All UCSF locations in San Francisco; including UCSF Benioff Children's clinics in Oakland and Mission Bay.

**BCH:** Benioff Children's Hospital-Oakland and Mission Bay (Pediatric Specific Changes)

## APeX New Hire Training Schedule

Need to see when the next APeX Training class offering? [Click here](#) to see a list of all upcoming Ambulatory APeX classes.

## For Newcomers, Join our LISTSERV!

If you were forwarded this announcement and you want to receive the Ambulatory Monthly Updates directly, join our [Listserv here](#).

To view previous Ambulatory Updates- [click here](#)

To view Inpatient Provider Announcements- [click here](#)

[The APeX Knowledge Bank- Website](#)

For APeX news on upcoming upgrades and events, visit the [New APeX Hub website](#)

**Disclaimer: You are receiving this monthly update because your APeX responsibilities contain Ambulatory security; including but not limited to reviewing patient charts, rooming patients, placing orders, writing notes, documenting within activities in an encounter etc.; you manage and/or support staff with Ambulatory responsibilities; or you are identified as an end user with APeX Ambulatory security. Content in this update is for educational and informational purposes. Please review for latest APeX Ambulatory update.**

**Always Remember Your Responsibilities for Use for the Electronic Health Record**

APeX is the legal electronic health record for patients at the UCSF Medical Center. All users have the following responsibilities:

- Assure that all information is entered correctly and accurately and within your scope of practice.
- Stay up to date on changes in APeX.
- Follow all UCSF Policies & Procedures on use of the electronic health record.
- Report any issues or problems to your manager and/or IT Service Desk at (415) 514-APeX (2739).