

Ambulatory APeX Monthly Update April 2025

Ambulatory Users

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

April 8, 2025

Reminder: Beaker Specimen Collection Go-Live

Audience Impacted: All Clinicians Performing Lab Specimen Collection/Duties

Brief Description & Workflow:

We are preparing for the launch of **Beaker**, our new Lab Information System replacing Sunquest, Lab Coll (Collection Manager), and SoftLab. The goal of this implementation is to enhance efficiency and user experience through modernizing lab workflows, improving results accessibility, and integrating specimen tracking. This new system will be required for sending specimens to the lab.

To prepare for the new system, we are offering the following training resources:

- Starting **Tuesday, April 1st**, eLearning modules will be available at the UC Learning Center to prepare clinicians for the new lab collection workflow in APeX
- Access these modules through the [Knowledge Bank page](#).
- SuperUsers will be your primary contact for training needs and resources.

Beaker will go-live **May 31st**.

APeX Training

HomeAudiencesTopicsTraining

Beaker Nurse/Tech/Amb eLearnings - COMING 4/1/2025

Topics: [Lab Modernization Project](#)

Please select your ROLE to open eLearning link (UCSF MyAccess login required):

1. AMB Clinical Staff

2. INP Nurse

3. ED Nurse

4. OpTime - PreOp/IntraOp/PACU Nurse

5. Birth Center Nurse (Stork)

6. Radiology Nurse/Techs

Informaticist, SME, Build Analyst: Craig M. Johnson, MSN, RN, NI-BC, FNP; Katie O'Connor RN, BSN, NI-BC; Sky Aulita

Reminder: Lab Order Build Freeze - Now through May 31, 2025

Audience: All Clinical Users

Reason for Change To prepare for Beaker, lab order changes are on hold to ensure a smooth transition.

Brief Description & Workflow:

- **What is happening?** – We are preparing for the launch of Beaker, our new APeX Lab Information System replacing Sunquest and SoftLab. The Beaker system will be necessary for submitting lab specimens after it goes live on May 31st. To prepare for the new system, lab order changes are on hold to ensure a smooth transition.

- **How will this affect me?** – This freeze primarily affects change requests to lab orders in SmartSets, SmartGroups, Therapy Plans, Treatment Plans, and Order Panels. Other clinical changes will have minimal impact.
- **Will there be exceptions?** – Changes related to patient safety or other significant risk can still be made with approval. Contact your assigned analyst if this applies to you.

SME/Informaticist: Charlotte Hsieh, MD; Analyst: Andy Mucklow

Colorectal Screening HM Topic Update

Audience: All Primary Care Providers

Reason for Change: We are steadily making improvements to the Colorectal Screening workflow in the health maintenance banner. This change will simplify the modifier workflow for providers.

Brief Description & Workflow: All but one colorectal screening HM modifier has been removed to simplify the screening workflow.

The screenshot shows the 'Health Maintenance' interface. A yellow banner at the top states 'Immunizations from outside sources need attention.' with a 'Go Reconcile' button. Below this is a table of 'Current Care Gaps'. A 'Health Maintenance Modifiers' dialog box is open, showing a search bar with 'crd' and a table with one row: 'Colorectal Cancer Screening (18-99 yo) (CRC Screenin)' with the number '19098'. The dialog box also has 'Accept' and 'Cancel' buttons at the bottom.

Informaticist/SME: Adult Health Maintenance Committee (Dr. Nicole Appelle); Analyst: Erik Stewart

Align Pediatric Case Management Pediatric DME Orders

Audience: West Bay and East Bay

Reason for Change: Align pediatric case management pediatric DME orders between West Bay and East Bay

Description & Workflow: Case management DME orders were previously separately categorized by campus location. These orders have been combined and alphabetized under **Pediatric**

Pediatric	
<input type="checkbox"/> 3 in 1 Commode (DME)	<input type="checkbox"/> Incontinence Supplies - Pediatric
<input type="checkbox"/> Apnea Monitor - Pediatric (Home Respiratory)	<input type="checkbox"/> Infant Home Care Orders (OB Home Care)
<input type="checkbox"/> BCH-Oak Discharge DMEs	<input type="checkbox"/> Lab Draws (Post Discharge) - Pediatric
<input type="checkbox"/> BCH-Oak Ortho DME Supplies	<input type="checkbox"/> Nebulizer - Pediatric (Home Respiratory)
<input type="checkbox"/> BIPAP - Pediatric (Home Respiratory)	<input type="checkbox"/> Ortho Equipment (DME)
<input type="checkbox"/> Broviac or PICC Line - Pediatric (Home Infusion)	<input type="checkbox"/> Ortho Home Care Equipment - Other (DME)
<input type="checkbox"/> Cool Mist - Pediatric (DME)	<input type="checkbox"/> Ostomy Care (Home Care)
<input type="checkbox"/> Cough Stimulating Device (DME)	<input type="checkbox"/> Ostomy Supplies (DME)
<input type="checkbox"/> CPAP - Pediatric (Home Respiratory)	<input type="checkbox"/> Ostomy/Wound Care - Pediatric
<input type="checkbox"/> Durable Medical Equipment - Pediatric	<input type="checkbox"/> Oxygen - Pediatric (Home Respiratory)
<input type="checkbox"/> Enteral Nutrition - Pediatrics (Home Nutrition)	<input type="checkbox"/> Parenteral Nutrition Supplies - Pediatric
<input type="checkbox"/> Enteral Nutrition Supplies - Pediatric	<input type="checkbox"/> Pediatric Pulmonary DMEs
<input type="checkbox"/> Equipment/Home Care (Specify) - Pediatric	<input type="checkbox"/> Portable Suction (Home Respiratory)
<input type="checkbox"/> Front Wheeled Walker (DME)	<input type="checkbox"/> PT/OT/Speech Outpatient Referral (Pediatric Case Management ONLY)
<input type="checkbox"/> Fully Reclining Wheelchair (DME)	<input type="checkbox"/> Pulse Oximetry (DME)
<input type="checkbox"/> Home Care Orders - Pediatric	<input type="checkbox"/> Relizorb - Pediatric (DME)
<input type="checkbox"/> Home Central Venous Line - Pediatric	<input type="checkbox"/> Skin Care Supplies - Pediatric
<input type="checkbox"/> Home Hospice - Pediatric	<input type="checkbox"/> Tracheostomy Equipment - Pediatric (Home Respiratory)
<input type="checkbox"/> Home Nursing - Pediatric (DME)	<input type="checkbox"/> Urology Supplies / Nursing Care - Pediatric
<input type="checkbox"/> Home Respiratory - Pediatric	<input type="checkbox"/> Ventilator - Pediatric (Home Respiratory)
<input type="checkbox"/> Home Tracheostomy - Pediatric	<input type="checkbox"/> Wheelchair (DME)
<input type="checkbox"/> Hospital Bed - Pediatric (DME)	<input type="checkbox"/> Wound Care - Pediatric (DME)

Natalia Kelley – informaticist, Trevor Haines – SME, Huy Tran - Build Analyst

Warning on MAR if Pharmacy Check is Missing

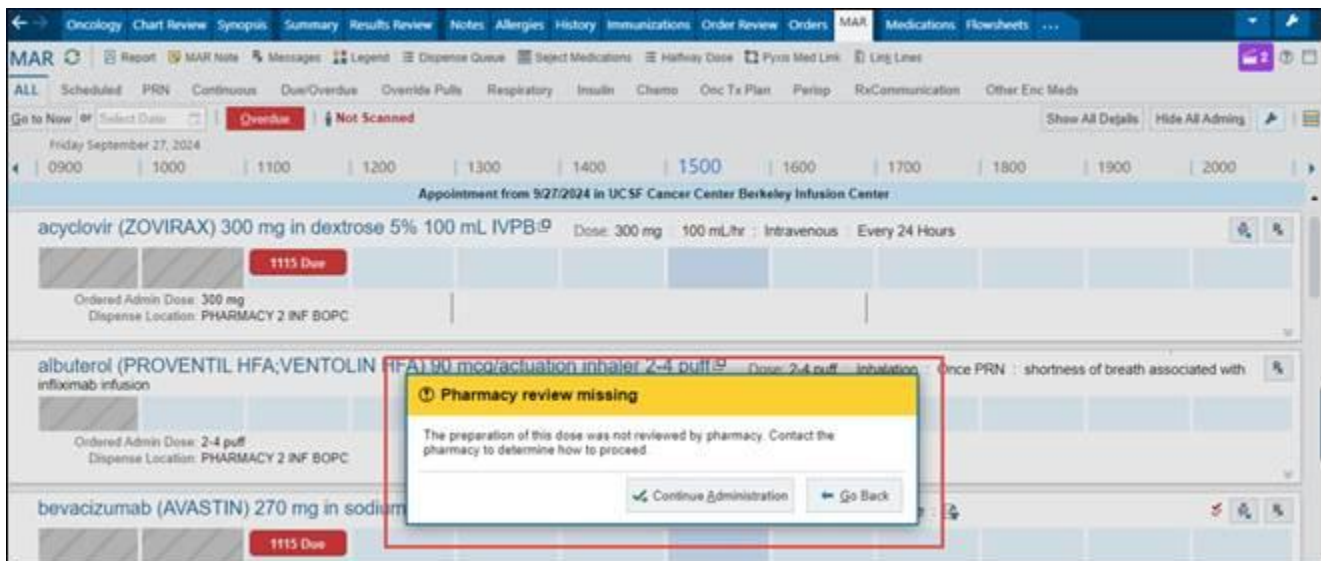
Audience: Nursing and Pharmacy Staff

Reason for Change: To improve safety, nursing will be notified if the pharmacist has not checked a product that is being scanned on the MAR.

Description & Workflow: If a pharmacist check has not been completed, the following alert will appear on the MAR after a product is scanned. Please contact pharmacy with how to proceed if this alert appears.



Alert: The warning for a missing Pharmacist Check will not appear if the product is not scanned. Please ensure all products are scanned on the MAR to leverage all safety features.



Informaticist: Allison Pollock, PharmD; Analyst: Man Nguyen, PharmD

Updated Order Questions for Imaging Referrals and Consults: Image-Guided Biopsies, Interventional Radiology, and Neuroradiology

Audience: All ordering providers who place referral or consult orders to IR, neuroradiology, or for image-guided biopsies on **adult** patients

Reason for Change: Previously, the referral and consult order questions lacked consistency across imaging divisions when ordering for adult patients.

Description & Workflow: Improvements made to standardized common questions within the referral and consult orders across imaging divisions (e.g. 'reason for consult' and 'can the patient provide consent?'). Additionally, the ordering workflow has been streamlined by eliminating unnecessary questions and sections from the order composer.

Note: The referral and consult process for image-guided biopsies now incorporates more specific required questions essential for biopsy examinations, specimen handling, and Beaker.



For help ordering the correct referral or consult, additional **Process Instructions** have been included.

If additional information is needed refer to the tip sheet here:

[Rad: Providers Placing Orders](#)

The following order below outline the changes.

Image-Guided Biopsy

Ambulatory Referral for Image-Guided Biopsy (Radiology Performed)

Accept

Cancel

Status:

Normal Standing Future

Expected Date:

Today Tomorrow 1 Week 2 Weeks 1 Month 3 Months 6 Months 1 Year

Approx.

Comment:

After Clinic Visit Before Next Appt Before Surgery With Next Clinic Visit

Expires:

3/24/2026 1 Month 2 Months 3 Months 4 Months 6 Months 1 Year

Priority:

Routine (within 14 days) Routine (within 14 days) ASAP (within 72 hrs) Today (within 24 hrs) Scheduled (set expected date)

Resulting Agency:

UCSF RAD

Reason for Consult

Lesion Requested, if known (if unknown, please enter "any accessible site")

Is additional testing beyond cytology and/or histopathology anticipated?

No Lymphoma Infection Molecular Testing (e.g. UCSF500, ALK, BRAF, etc.) Other (Specify in Comments)

Is this biopsy for research?
Yes No

Has biopsy been approved already by a faculty radiologist? If so, list by whom in comments
Yes No

Can the patient provide consent?
Yes No

Is the patient on anticoagulation or antiplatelet medication? (e.g. Aspirin, Plavix, Coumadin, etc.) Please list in Comments.
Yes No

Contact name and phone # for responsible clinician to contact if further discussion is necessary

Process Instructions:
To speak to a radiologist, please contact:
Reading Room Practice Coordinators
Monday-Friday, 8am-5pm
Phone: (415) 502-4318
Email: radreadingroom@ucsf.edu
https://radiology.ucsf.edu/patient-care/health-professionals/radiology-library-health-pro#

Comments:
Add Comments

Next Required

Accept

Cancel

Inpatient Consult for Image-Guided Biopsy (Radiology Performed) ✓ Accept ✗ Cancel

Priority: Routine STAT Before Discharge Pre-Procedure

Reason for Consult:

Lesion Requested, if known (if unknown, please enter "any accessible site")

Is additional testing beyond cytology and/or histopathology anticipated?
☐ No ☐ Lymphoma ☐ Infection ☐ Molecular Testing (e.g. UCSF500, ALK, BRAF, etc.)
☐ Other (Specify in Comments)

Is this biopsy for research?

Has biopsy been approved already by a faculty radiologist? If so, list by whom in comments

Can the patient provide consent?

Is the patient on anticoagulation or antiplatelet medication? (e.g. Aspirin, Plavix, Coumadin, etc.) Please list in Comments.

Contact name and phone # for responsible clinician to contact if further discussion is necessary

Process Instructions: [To speak to a radiologist, please contact: Reading Room Practice Coordinators Monday-Friday, 8am-5pm Phone: \(415\) 502-4...](#)

Comments: [+ Add Comments](#)

Reference Links: [• Radiology Info](#)

Next Required Link Order ✓ Accept ✗ Cancel

Interventional Radiology

- Ambulatory Referral to Adult Interventional Radiology

Ambulatory Referral to Adult Interventional Radiology ✓ Accept ✗ Cancel

Status: Normal Standing Future

Expected Date: Today Tomorrow 1 Week 2 Weeks 1 Month 3 Months 6 Months 1 Year Approx.

Comment: After Clinic Visit Before Next Appt Before Surgery With Next Clinic Visit

Expires: 1 Month 2 Months 3 Months 4 Months 6 Months 1 Year

Priority: Routine (within 14 days) ASAP (within 72 hrs) Today (within 24 hrs)
Scheduled (set expected date)

Resulting Agency: UCSF RAD

Reason for Consult:

Is anesthesia required?

Is this request for venous access?

Is this a request for Paracentesis or Thoracentesis?

Procedure date expected:

Can the patient provide consent?

Is the patient on anticoagulation or antiplatelet medication? (e.g. Aspirin, Plavix, Coumadin, etc.) Please list in Comments.

Process Instructions: [If you are requesting an image-guided biopsy \(except transjugular liver biopsy\), please place an order for REF325 Ambulatory Referral for Image-guided Biopsy \(Radiology performed\) for outpatients OR CON205 IP Consult for Image-Guided Biopsy \(Radiology Performed\) for inpatients.](#)
[If you are requesting a lumbar puncture, please place an order for REF457 Ambulatory Referral for Neuroradiology Procedure for outpatients OR CON221 IP Consult for Neuroradiology Procedure for inpatients.](#)

Comments: [+ Add Comments](#)

[Additional Order Details](#)

Next Required ✓ Accept ✗ Cancel

- Inpatient Consult to Adult Interventional Radiology

Inpatient Consult To Adult Interventional Radiology ✓ Accept ✗ Cancel

Priority: Routine STAT Before Discharge Pre-Procedure

Frequency:

At: Today Tomorrow

Reason for Consult:

Is anesthesia required?

Is this request for venous access?

Is this a request for Paracentesis or Thoracentesis?

Procedure date expected:

Can the patient provide consent?

Is the patient on anticoagulation or antiplatelet medication? (e.g. Aspirin, Plavix, Coumadin, etc.) Please list in Comments.

Comments: [Add Comments](#)

Process Instructions: [If you are requesting an image-guided biopsy \(except transjugular liver biopsy\), please place an order for REF325 Ambulatory...](#)

Next Required Link Order ✓ Accept ✗ Cancel

Neuroradiology

- Ambulatory Referral for Neuroradiology Procedure

Ambulatory Referral for Neuroradiology Procedure ✓ Accept ✗ Cancel

Status: Normal Standing Future

Expected Date: Today Tomorrow 1 Week 2 Weeks 1 Month 3 Months 6 Months 1 Year ☐ Approx.

Comment: After Clinic Visit Before Next Appt Before Surgery With Next Clinic Visit

Expires: 1 Month 2 Months 3 Months 4 Months 6 Months 1 Year

Priority: Routine (within 14 days) ASAP (within 72 hrs) Today (within 24 hrs) Scheduled (set expected date)

Class: Outgoing Referral UCSF

Resulting Agency:

Reason for Consult:

Is anesthesia required?

Procedure date expected:

Can the patient provide consent?

Is the patient on anticoagulation or antiplatelet medication? (e.g. Aspirin, Plavix, Coumadin, etc.) Please list in Comments.

Are you requesting a lumbar puncture?

The necessary laboratory and pathology orders have been placed (e.g. CSF analysis, microbiology, serum, pathology)

Process Instructions: [To speak to a radiologist, please contact:
Reading Room Practice Coordinators
Monday-Friday, 8am-5pm
Phone: \(415\) 502-4318
Email: radreadingroom@ucsf.edu
https://radiology.ucsf.edu/patient-care/health-professionals/radiology-library-health-pro#](#)

Comments: [Add Comments](#)

Scheduling Instructions: [A nurse will be calling you prior to your scheduled appointment to provide you with specific exam instructions. If they hav...](#)

Reference Links: [UCSF Contrast Guidelines](#) [UCSF Radiology Guidelines-Imaging, Pregnancy, Lactation](#)

Next Required ✓ Accept ✗ Cancel

- Inpatient Consult for Neuroradiology Procedure

Inpatient Consult for Neuroradiology Procedure Accept Cancel

Priority: **Routine** STAT Before Discharge Pre-Procedure

Frequency: **1 Time Imaging**

At: **Today** Tomorrow

Reason for Consult

Is anesthesia required?

Procedure date expected:

Can the patient provide consent?

Is the patient on anticoagulation or antiplatelet medication? (e.g. Aspirin, Plavix, Coumadin, etc.) Please list in Comments.

Are you requesting a lumbar puncture?

The necessary laboratory and pathology orders have been placed (e.g. CSF analysis, microbiology, serum, pathology)

I have discussed directly with neuroradiology (phone: 8-2505; 3-1079 after hours) prior to ordering this consult

Comments: [Add Comments](#)

Process Instructions: To speak to a radiologist, please contact Reading Room Practice Coordinators Monday-Friday, 8am-5pm Phone: (415) 502-4...

Reference Links: [UCSF Contrast Guidelines](#) [UCSF Radiology Guidelines-Imaging](#) [Radiology Info](#) [Pregnancy, Lactation](#)

Next Required [Link Order](#) Accept Cancel

SMEs: Hailey Choi, Marc Kohli, Matt Barkovich, Ryan Kohlbrenner, Kim Kallianos, Kevin McGill
Informaticists: Hailey Choi, Orders Office Hours (OOH) **Build analyst:** Grace Lin

Tip of the Month: Use Order Sets for PETCT and Diagnostic CT Orders

Audience: UCSF Radiation Oncology Providers

Description: There has been an increase in incorrectly placed diagnostic CT orders that are meant to be done in conjunction with a PETCT exam. Providers should use the PETCT FDG Vertex to Mid Thigh with Diagnostic CT order set to order the PETCT and any CT exam that need to be done.

Order Search Close

PETCT FDG Search Browse Preference List Facility List

Panels Search panels by user Filter (Alt+T)

Name	Pref List	Type	Code	ID
PETCT FDG Vertex to Mid Thigh with Diagnostic CT	UCSF WB AMB ORD...	Order Panel	O445515	459693
FU PETCT HN Order Set	CHAN, JASON W'S (...)	Order Panel	O445521	459699
PETCT H&N	QIAN, ALEXANDER ...	Order Panel	O445515	459693

This order set contains the correct diagnostic CT exams that are configured to schedule to the appropriate PETCT resources. Placing CT orders meant to be done with PETCT outside of this order set will result in scheduling problems.

Informaticist/SME: Rudy Baltodano; Analyst: Yifang Nie

Starting April 7, 2025, we will be piloting updated registration deadlines to streamline the process for APeX training classes. Please take note of the new deadlines for the classes listed below.

SlicerDicer Office Hours

Date	Time	Meeting Link
Wednesday's	3:40 pm – 4:30 pm	JOIN
Thursday's	8:10 am – 9:00 am	JOIN

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
April 3, 2025	12:10 pm - 1:00 pm
April 17, 2025	12:10 pm - 1:00 pm
May 1, 2025	12:10 pm - 1:00 pm
May 15, 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).