

Patient Access APeX September Update - **Effective 9/9/25**

Patient Access Users

In this edition:

| | |
|--|----|
| Updated Appointment Cancellation Reasons | 1 |
| Crosswalk of old codes to new codes: | 3 |
| Discharge Watchlist Dashboard Updated | 3 |
| MyChart Activation Accessible from Checklist | 4 |
| New Billing Flag for Oakland Roots or Oakland Soul Sports Club | 5 |
| New Social Worker Facesheet | 6 |
| Gentle MyChart Proxy Expiration Notification – Deceased Patients | 8 |
| Pronoun Selection Added to Demographics Navigator | 9 |
| Enhancing Adult Discharge Milestones | 10 |
| APeX Reporting Office Hours | 11 |
| Patient Access Office Hours | 12 |
| APeX New Hire Training Schedule | 12 |
| For Newcomers, Join our LISTSERV! | 12 |

Link to the Knowledge Bank: [Patient Access APeX September Update](#)

Updated Appointment Cancellation Reasons

Audience impacted: West Bay, East Bay, Marin, Community Affiliates

Reason for change: To make it easier to find the right cancellation codes while still retaining the information needed for accurate reporting.

Description & workflow: 21 codes have been reduced to 11 codes, broken down into 3 categories: Clinician, Operations, and Patient.

The new codes are described below:

| Category | Cancellation Code | Description |
|------------|--|--|
| Clinician | Clinician - Appointment Not Needed/Treatment Change | The clinician determines that the appointment is unnecessary or changes the treatment plans. |
| | Clinician - Clinical Emergency, Co-surgery, Unplanned Inpatient Coverage | <i>Clinical emergencies</i> and unplanned clinical situations. |
| | Clinician - Planned; Vacation, Conference, Meeting, Sabbatical, Attending (Inpatient Coverage) | <i>Planned</i> clinician absences such as vacations, conferences, meetings, sabbaticals, or attending inpatient coverage. |
| | Clinician - Unplanned; Jury Duty, Sick, Family Emergency, Leave | <i>Unplanned</i> clinician absences due to personal emergencies like jury duty, illness, family emergencies, or other leaves. |
| Operations | Operations - Admin Issue (Auth not obtained, missing records or tasks, scheduling error) | Administrative issues, including authorization not obtained, missing records or tasks, and scheduling errors |
| | Operations – Uncontrollable Event, Clinic Closure or Labor Action | Unforeseen or uncontrollable events that cause the clinic <i>closure</i> or cancel/reschedule due to Labor Action. |
| | Operations - Waitlist/Moved to Earlier Date | Waitlist adjustments or moving to an earlier date. |
| Patient | Patient – Declined to Reschedule or Dismissal | Patient is cancelling and <i>declining to reschedule</i> or has been dismissed from the clinic. |
| | Patient – Personal/Transportation/Illness/Tech Issue | Various <i>patient personal reasons</i> , including deceased, declined to reschedule, too ill, received care elsewhere, transportation issues, technical issues, requesting a different visit mode, or other general personal reasons. |
| | Patient - Via Automated Reminder System | Cancellations initiated through automated reminders. |
| | Patient - Via MyChart | Cancellations initiated via the MyChart platform. |

Crosswalk of old codes to new codes:

| CLINICIAN CATEGORY CODES | |
|---|--|
| OLD CODES | NEW CODES |
| Clinician - Appointment Not Needed/Treatment Change | Clinician - Appointment Not Needed/Treatment Change |
| Clinician - Clinical Emergency, Co-surgery, Unplanned Inpatient Coverage | Clinician - Clinical Emergency, Co-surgery, Unplanned Inpatient Coverage |
| Clinician - Jury Duty, Sick, Family Emergency, Leave | Clinician - Planned : Vacation, Conference, Meeting, Sabbatical, Attending (Inpatient Coverage) |
| Clinician - Vacation, Conference, Meeting, Sabbatical, Attending (Inpatient Coverage) | Clinician - Unplanned : Jury Duty, Sick, Family Emergency, Leave |
| PRACTICE CATEGORY CODES | |
| OLD CODES | NEW CODES |
| Operations - Authorization Not Obtained | Operations - Admin Issue (Auth not obtained, missing records or tasks, scheduling error) |
| Operations - Clinic Closure | Operations - Uncontrollable Event , Clinic Closure or Labor Action |
| Operations - Dismissal/Referral/Appointment Not Accepted | |
| Operations - Missing Records or Tasks | |
| Operations - Patient Late | |
| Operations - Waitlist/Moved to Earlier Date | Operations - Waitlist/Moved to Earlier Date |
| PATIENT CATEGORY CODES | |
| OLD CODES | NEW CODES |
| Patient - Declined to Reschedule (enter comment) | Patient - Decline to Reschedule or Dismissal |
| Patient - Other (enter comment) | |
| Patient - Personal Reasons/ Transportation/ Too Late for Appt | |
| Patient - Received Care Elsewhere | |
| Patient - Technical Issue or Requesting Different Visit Mode | Patient - Personal/Transportation/Illness/Tech Issue |
| Patient - Too Ill | |

Name of Informaticist, SME, Build Analyst – Michelle Borgmann

Discharge Watchlist Dashboard Updated

Audience impacted: West Bay

Reason for change: Request from operations

Description & workflow: The Discharge Watchlist Dashboard now includes a new component called **Discharge Milestone Progress**.

This component provides a quick view of patient discharge readiness by showing:

- Patients with **all discharge milestones completed** whose expected discharge date is on or before today.
- Patients with **incomplete discharge milestones** whose expected discharge date is on or before today.

This enhancement makes it easier to track discharge readiness and identify patients who may need additional support to complete required steps before discharge.

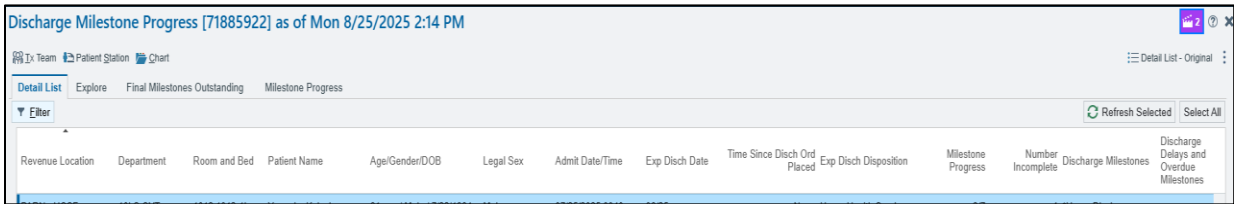


Discharge Milestone Progress

19 All Milestones Complete

| | |
|-------------------------------------|------------|
| Number Incomplete | Total |
| All Milestones Complete | 19 |
| One Milestone Remaining | 36 |
| Two Milestones Remaining | 31 |
| Three Milestones Remaining | 10 |
| More Than Four Milestones Remaining | 6 |
| Total count | 102 |

Press the **View Report** button to access a Detail List of the Discharge Milestone Progress report:



Discharge Milestone Progress [71885922] as of Mon 8/25/2025 2:14 PM

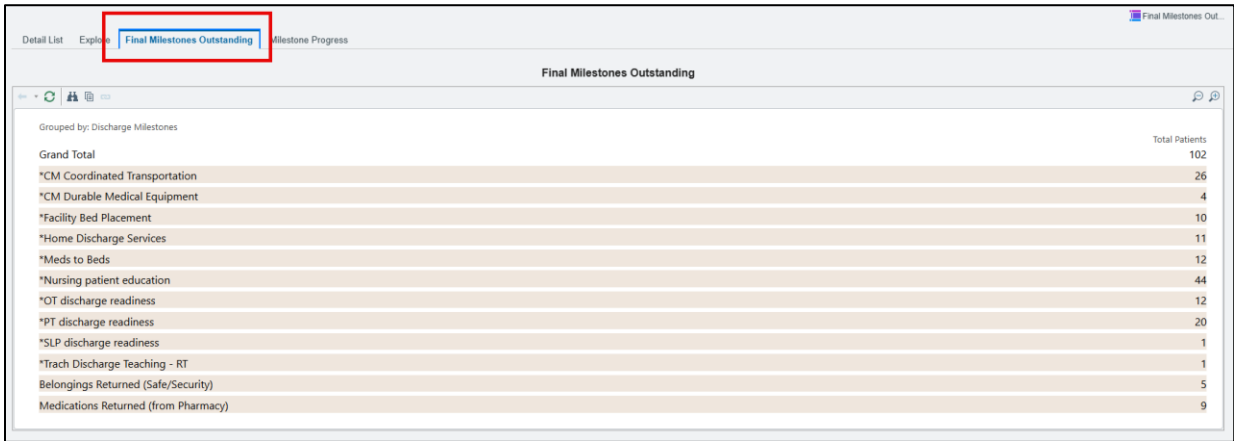
Team Patient Station Chart

Detail List Explore Final Milestones Outstanding Milestone Progress

Filter Refresh Selected Select All

| Revenue Location | Department | Room and Bed | Patient Name | Age/Gender/DOB | Legal Sex | Admit Date/Time | Exp Disch Date | Time Since Disch Ord Placed | Exp Disch Disposition | Milestone Progress | Number Incomplete | Discharge Milestones | Discharge Delays and Overdue Milestones |
|------------------|------------|--------------|--------------|----------------|-----------|-----------------|----------------|-----------------------------|-----------------------|--------------------|-------------------|----------------------|---|
|------------------|------------|--------------|--------------|----------------|-----------|-----------------|----------------|-----------------------------|-----------------------|--------------------|-------------------|----------------------|---|

Additional information can be found on the **Final Milestone Outstanding** tab.



Detail List Explore **Final Milestones Outstanding** Milestone Progress

Final Milestones Outstanding

Grouped by: Discharge Milestones

| | Total Patients |
|--------------------------------------|----------------|
| Grand Total | 102 |
| *CM Coordinated Transportation | 26 |
| *CM Durable Medical Equipment | 4 |
| *Facility Bed Placement | 10 |
| *Home Discharge Services | 11 |
| *Meds to Beds | 12 |
| *Nursing patient education | 44 |
| *OT discharge readiness | 12 |
| *PT discharge readiness | 20 |
| *SLP discharge readiness | 1 |
| *Trach Discharge Teaching - RT | 1 |
| Belongings Returned (Safe/Security) | 5 |
| Medications Returned (from Pharmacy) | 9 |

Name of SME: Toni Workman-Braden, Analyst: Jill Reynolds

MyChart Activation Accessible from Checklist

Audience impacted: All

Reason for change: To increase MyChart usage and signups.

Description & workflow: For patients who do not have MyChart or MyChart Proxy, there will be an activation link in the Registration Checklist.

Click on the link to access the **Communication Preferences** form.

For more information, please view the tip sheet: [MyChart Activation for Patients](#)

Name of SME: Andrea Works, Analyst: Billy Harris

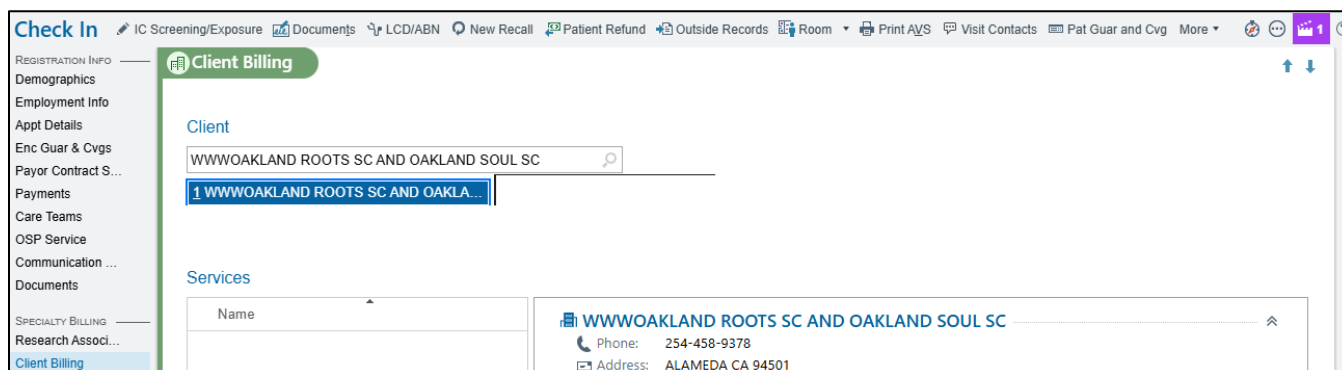
New Billing Flag for Oakland Roots or Oakland Soul Sports Club

Audience impacted: West Bay Registration Staff

Reason for change: To ensure accurate billing for Oakland Roots and Oakland Soul Sports players, users are now required to apply a client billing flag to applicable encounters. This flag ensures that the encounter is billed correctly.

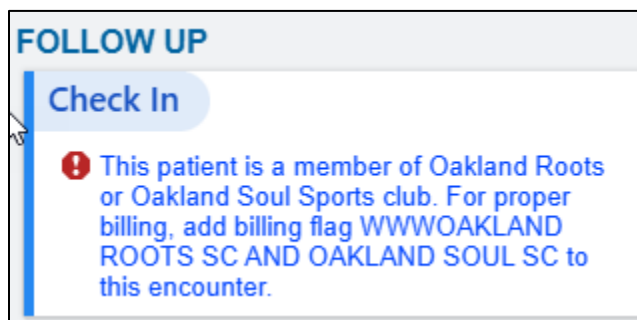
Description & workflow: A new billing flag has been created to support accurate billing for Oakland Roots and Oakland Soul Sports players.

For patients with an *Oakland Roots* patient type, use the Client Billing flag **WWWOAKLAND ROOTS SC AND OAKLAND SOUL SC** to ensure accurate billing for these encounters.



The screenshot shows the 'Client Billing' section of the Epic EHR interface. The 'Client' field is populated with 'WWWOAKLAND ROOTS SC AND OAKLAND SOUL SC'. The 'Services' section shows a dropdown menu with the same text selected. The patient's contact information is displayed at the bottom right.

If the required billing flag is not applied, an error message will appear, and the encounter cannot be completed until the flag is added.



Note: It is no longer required to create an Institutional Guarantor Account or Coverage for the Oakland Roots and Oakland Soul Sports players.


Name of Build Analyst: Gianna Rogerson

New Social Worker Facesheet

Audience impacted: Social Workers in UCSF Hospitals and BCH OAK

Reason for change: Social workers need certain pieces of information to be easily visible, so they now have their own facesheet report.

Brief description & workflow: Social workers need demographic information, such as the County that the patient lives in, easily visible on the facesheet.

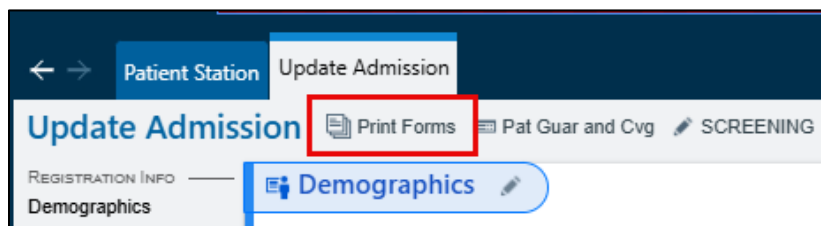
| | | | |
|--|--|---|--|
|  | | Name: POTTER, HARRY MRN: 80042708 HLR: 80027868 Patient Class: IP OBS Date & Time: N/A Status: Confirmed Admission IP Admit Date & Time: 4/20/2025 0900 | |
| ENCOUNTER | | | |
| Adv Dir: No Hospital Service: Hospital Medicine Admitting Provider: Cucina, Russell Joseph, * Admit Source: Physician Referral Attending Provider: Cucina, Russell Joseph, * | | Unit: 14L MEDICINE Bed: P Referring Physician: Cucina, Russell Joseph Referring Phone: 415-476-0726 Adm Diagnosis: fractured ankle | |
| PATIENT | | | |
| Name: POTTER, HARRY Address: 0208 Po Box City: OAKLAND, CA 94611-1109 County: ALAMEDA SSN: xxx-xx-4202 Eth: Not Hispanic or Latino | | DOB: 7/24/1978 (47 yrs) Relationship: Married Sex: male Race: White Phone: 415-514-3652 Pref Language: English E-mail: No e-mail address on record PCP: Cucina, Russell Joseph, * PCP Phone: 415-476-0726 | |
| EMERGENCY CONTACT | | | |
| Contact Name: 1. Potter, Ginny Relationship to Patient: Spouse Mobile Phone: 415-632-4412 Home Phone: 415-554-6585 Work Phone: 415-632-4412 2. *No Contact Specified* | | | |
| GUARANTOR | | | |
| Guarantor: POTTER, HARRY Address: 0208 Po Box Oakland, CA 94611-1109 Rel to Patient: Self Guarantor ID: 100004610 Employer: Ministry of Magic | | DOB: 7/24/1978 Sex: Male Home Phone: 415-554-6585 Work Phone: Status: FULL TIME | |
| COVERAGE | | | |
| PRIMARY INSURANCE | | | |
| Payor: ANTHEM Group Number: Subscriber Name: POTTER, HARRY Subscriber ID: 123456789 Pat. Rel. to Subscriber: Self Ref/Auth #: 6541788741 Aid Code: | | Plan: BX CA ANTHEM Insurance Type: INDEMNITY Subscriber DOB: 07/24/1978 Verification Status: Auth By: Effective To: Auth Telephone: | |
| SECONDARY INSURANCE | | | |
| Payor: Group Number: Subscriber Name: Subscriber ID: Pat. Rel. to Subscriber: Ref/Auth #: Aid Code: | | Plan: Insurance Type: Subscriber DOB: Verification Status: Auth By: Effective To: Auth Telephone: | |

There are two ways to access this new facesheet:

- From Registration
- From the Patient's Chart

Accessing the Social Worker Facesheet from Registration:

From the Registration form, **Press Print Forms**.



The screenshot shows the 'Patient Station' interface with the 'Update Admission' form. The 'Print Forms' button is highlighted with a red box. Other buttons visible include 'Update Admission', 'Pat Guar and Cvg', 'SCREENING', 'Demographics', and 'REGISTRATION INFO'.

Add the **UCSF ADT FACESHEET SOCIAL WORK** form, the printer (*should be automatically populated*), and press the printer icon.

Print Forms

| <input checked="" type="checkbox"/> Form | Printer | Tray | Copies |
|---|------------------------|------|--------|
| <input type="checkbox"/> UCSF ADT Facesheet | | | 1 |
| <input type="checkbox"/> UCSF ADT ADULT ARMBAND | | | 1 |
| <input type="checkbox"/> UCSF ADT PEDIATRIC ARMBAND | | | 1 |
| <input type="checkbox"/> UCSF ADT INFANT ARMBAND | | | 1 |
| <input type="checkbox"/> ZEBRA INPATIENT LABEL | | | 1 |
| <input type="checkbox"/> BCH OAK ADT LABEL SINGLE (LAB) | | | 1 |
| <input checked="" type="checkbox"/> UCSF ADT FACESHEET SOCIAL WO... | APEX TECH PRINT TO PDF | | 1 |
| <input type="checkbox"/> | | | |

Accessing the Social Worker Facesheet from the Patient Chart:

Open the Patients' Chart, go to the **SnapShot** tab, and use the magnifying glass to add the **UCSF ADT FACESHEET SOCIAL WORK** form.

← → **SnapShot** Chart Review Review Flowsheets Results Review Allergies History Problem List Implants Demographics Communications

UCSF ADT Facesheet

Index SW Cross Encounter Communication Discharge Snapshot w/FU Appts Psych SW Placement Referral (Adult) Vitals SW MAR Report Psych SW Placement Referral (Ped)

UCSF ADT Facesheet

UCSF Health

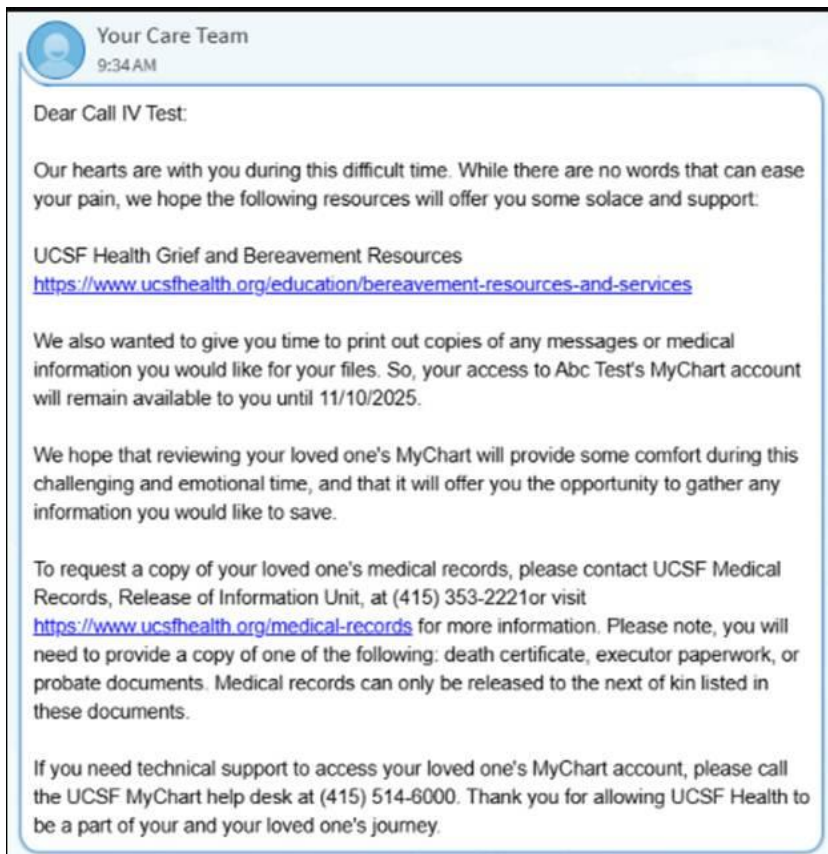
Name: POTTER, HARRY
MRN: 80043708 HAR:
Patient Class:
OBS Date & Time: N/A
Status:

Gentle MyChart Proxy Expiration Notification – Deceased Patients

Audience: All Users

Reason for Change: To send the proxy of a deceased patient a MyChart notification with ample time and support resources.

Description & Workflow: A patient proxy who has lost a loved one is now sent a gentle MyChart message with resources and support, as well as the timeframe for patient proxy expiration. A patient proxy has access for 90 days and will be given a dynamic date in their notification. Grief and bereavement resources are provided, as well as steps on how to request a copy of a loved one's medical record. Notification messages are additionally translated into Spanish, Russian, Simplified Chinese, and Traditional Chinese.



Informaticist/SME: Patient Communications/Decedent Affairs, Analyst: Damon Catania

Pronoun Selection Added to Demographics Navigator

Audience: All Users


Reason for Change: To support accurate collection of pronouns within the patient record

Brief Description & Workflow: Using the Demographics navigator, staff can now record the patient's pronouns. The Sexual Orientation Gender Identity (SOGI) form has been updated to collect "she/her", "he/him", and "they/them" to match the Demographics navigator.

Demographics

Basics | Employer and Identification | Patient Contacts | Pharmacies and Labs | EpicCa

Basics



Name
Oliver Greene

Date of Birth
Nov 14, 1985

Legal Sex ⓘ
Male

Sex Assigned at Birth ⓘ
[Empty field]

Sexual Orientation ⓘ
Bisexual

Pronouns ⓘ
☐ she/her.
 ☐ he/him
 ☐ they/them.



Note: While the system will allow recording of more than one pronoun, to avoid confusion, ask the patient which set of pronouns is their top preference when being seen at UCSF, and mark only that pronoun.

Informaticists/SMEs: Dr. Maria Byron, Dr. Maddie Deutsch; Build Analyst: Dre Graeser

Enhancing Adult Discharge Milestones

Audience impacted: West Bay

Reason for change: We are pleased to announce important updates to our Discharge Milestones, aimed at providing more transparency to the patient's discharge progress as well as improving upon the already existing automations for milestone start and completion tasks:

Brief description & workflow: Milestone Updates:

Case Management

- Dialysis/Infusion Coordination Readiness
 - Carved out this task from the Home Discharge Services

Pharmacy

- Meds to beds
 - Auto Completion logic updated. The Pharmacist now has a field called Meds to Beds Delivery Outcome. When setting the status of Delivery Complete, the dc milestone task will automatically complete.

Other

- SW discharge readiness
 - New milestone to track incomplete inpatient Social Work consult orders.
- Discharge Orders and Discharge Med Reg Milestones kick off at the start of admission
 - Previously, these milestones started at the time the Discharge order was placed.

Milestones Removed

- The following manually added (Ad Hoc) Discharge Milestones have been removed to support automation of all discharge milestone tasks.
 - IP DISCHARGE MILESTONES – OTHER 1
 - IP DISCHARGE MILESTONES – OTHER 2
 - IP DISCHARGE MILESTONES – OTHER 3
 - IP DISCHARGE MILESTONES – SCHEDULE APPOINTMENTS

Name of Informaticist: Tip Tilton, Natalia Kelley; Analysts: Philip Wico, Christy Sedore

APeX Reporting Office Hours

APeX Reporting Team members host office hours monthly. Get answers to your questions on APeX Reporting content and workflows. This is a forum to provide end users with immediate training support; there is no set agenda. Below is the upcoming schedule for Office Hours:

Join us each month, 12:10-1 pm

[APeX Reporting Office Hours Meeting Link](#)

| Date | Time |
|---------------------------|--------------------|
| September 4, 2025 | 12:10 pm - 1:00 pm |
| September 18, 2025 | 12:10 pm - 1:00 pm |
| October 2, 2025 | 12:10 pm - 1:00 pm |
| October 16, 2025 | 12:10 pm - 1:00 pm |

Patient Access Office Hours

| Date | Time |
|--------------------------|--------------------|
| September 9, 2025 | 9:00 am - 10:00 am |
| October 14, 2025 | 9:00 am - 10:00 am |
| November 11, 2025 | 9:00 am - 10:00 am |

Use the Zoom link below to drop in during monthly office hours.

<https://ucsf.zoom.us/j/94134819060?pwd=RHNNaDN2c204TzJOREgvcG9WRkptZz09>

This is not a meeting, but a forum to provide end users with immediate training support regarding questions on new releases, or other training-related issues (i.e., template build, registration errors, advanced scheduling techniques).

APeX New Hire Training Schedule

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

For Newcomers, Join our LISTSERV!

If you were forwarded this announcement and you want to receive the Patient Access Monthly Updates directly, join our [Patient Access ListServ](#).

[The APeX Knowledge Bank- Website](#)

Disclaimer: You are receiving this monthly update because your APeX responsibilities contain Patient Access security, including but not limited to: Registration, Scheduling, Check-in, Admitting, Discharge, Transfer, etc.; you manage and/or support staff with Patient Access responsibilities; or you are identified as an end user with APeX Patient Access security. Content in this update is for educational and informational purposes. Please review the latest APeX Patient Access updates.

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).