

Patient Access APeX Spring Upgrade - **Effective 5/31/25**

Patient Access

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Beaker/Spring 2025 Upgrade Training Zoom Support

APeX Upgrade support will be available from **Monday, June 2nd to Wednesday, June 4th**, from **7 am to 5 pm**. For assistance, click the **APeX Training Support** button on the Epic toolbar to launch the Zoom training support bridge.



APeX Training Support on Hyperspace toolbar

Submit APeX Tickets Directly from APeX

Audience: UCSF, BCH Oakland, and School of Dentistry

To report an APeX issue, click **Submit a Ticket** on the main Hyperspace toolbar in APeX and select the appropriate incident option. This feature opens ServiceNow and should automatically add your username, login department, and workstation ID to the ServiceNow ticket.



Registration

Reduce RTE Data Mismatch by Using a Payer-Filed Date of Birth

All RTE Users

When an RTE (Real-Time-Eligibility) query is sent but returns with a different date of birth than what we have on file in APeX, the system will automatically file the verified DOB under “Payer Filed DOB” in the **Coverage Edit** workflow.

Members

Harry Potter

Relationship to Subscriber

Self

Dependent Type

Non-Dependent

Relationship to Guarantor

Self

Verification Pending

Member Effective Dates

+ Add Effective Date Range

| Effective From | Effective To | Member ID | Payer Filed Name | Payer Filed Sex | Payer Filed DOB | Covered Status | Verification Status |
|----------------|--------------|-----------|------------------|-----------------|-----------------|----------------|---------------------|
| 04/01/2025 | | 123456789 | | | | Covered | Verified by Website |

New Way to Search for Addresses in Registration

All Patient Access Users

Use the new address search bar to quickly find and select the address you need. PO Boxes are not supported. For apartments, search for the building address here, then add the apartment number manually.

Permanent

Search New Address

Begin typing here to search for an address

Address

City (or ZIP)

Permanent

Search New Address

1800 owe

1800 Owens St, San Francisco, CA, 94158, USA

1800 Owens Rd, Reno, NV, 89506, USA

1800 Owens Gorge Rd, Bishop, CA, 93514, USA

1800 Owens St, La Cresta, CA, 93305, USA

1800 Owens Lake Dr, Fort Mohave, AZ, 86426, USA

Automatic Formatting for Addresses

All Patient Access Users

To ensure consistency, patient addresses are automatically formatted when saved in Registration.

For example, if an address is entered in all lowercase or mixed case, the system will correct the capitalization. It will also apply standard abbreviations, such as changing “street to “St” and “apartment” to Apt.” These formatting rules apply only to U.S. addresses.

Address: 3641 ocean ave

City (or ZIP): San Francisco

Demographics: Permanent 3641 Ocean Ave, San Francisco, CA 94132-1419

Preview E-Signature Link Recipients

All Patient Access Users

When you select the **On Accept send to Patient** option for an e-signature document, a window appears to show who will receive a link to the document and which contact methods will be used. Use the checkboxes to change where the link is sent, or click the *Edit* pencil to send the link to a different phone number or email address.

I have read, agreed to and received a copy of this Terms and Conditions of Service

Patient Sign Here
Signature of Patient or Patient Representative

Witness Sign Here
Signature of Witness (required if patient unable to sign)

Other
Signature of Witness (required if patient unable to sign)

Staff Sign Here
Signature of Interpreter

Financial Representative
Legal Representative

Self
Relationship to PT

Spouse/Significant
Relationship to PT

Make Available to Patient and Proxies
When selected and a required patient signature is missing, this document will be shared with the following eligible recipients in UCSF MyChart using the preferred communication methods:

| Name | Phone Number | Email Address | Edit |
|--------------|--|--|------|
| Tuesday Taco | <input checked="" type="checkbox"/> 805-720-9565 | <input checked="" type="checkbox"/> tara.crandall@ucsf.edu | |

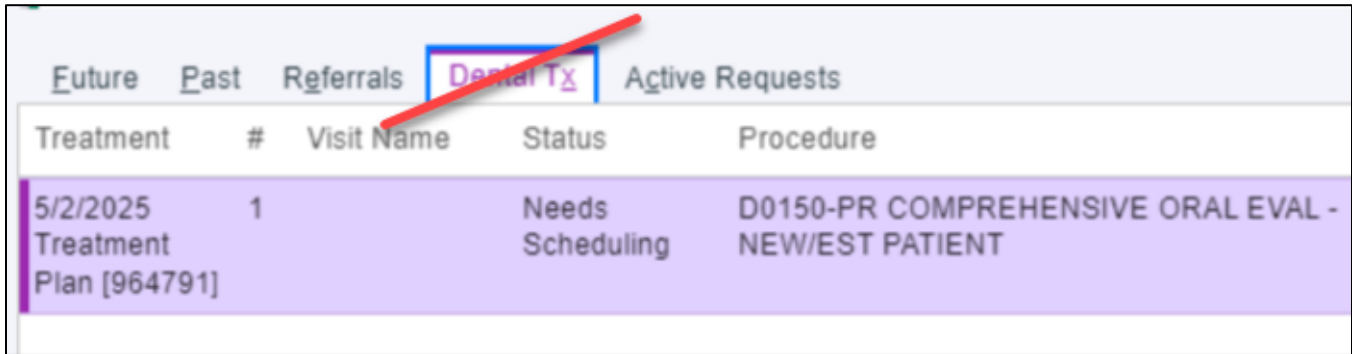
On Accept send to **Patient**

Dental Tx Tab Decommissioned

Audience: School of Dentistry/SOD

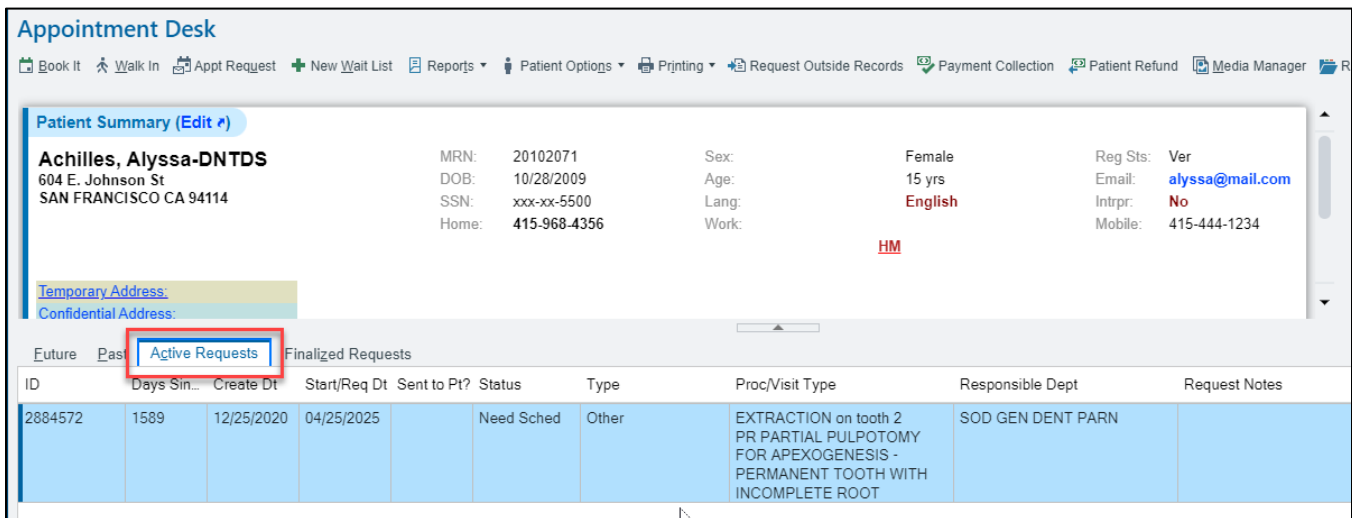
Reason for Change: Automatic Change

Description & Workflow: The 'Dental Tx' tab has been decommissioned, and going forward, all orders (including radiology) will be found on the 'Active Requests' tab.



| Future | Past | Referrals | Dental Tx | Active Requests |
|--|------|------------|---------------------|---|
| Treatment | # | Visit Name | Status | Procedure |
| 5/2/2025 Treatment Plan [964791] | 1 | | Needs Scheduling | D0150-PR COMPREHENSIVE ORAL EVAL - NEW/EST PATIENT |

All orders will now be in the Active Requests tab.



Appointment Desk

Book It Walk In Appt Request New Wait List Reports Patient Options Printing Request Outside Records Payment Collection Patient Refund Media Manager

Patient Summary (Edit)

Achilles, Alyssa-DNTDS
604 E. Johnson St
SAN FRANCISCO CA 94114

MRN: 20102071
DOB: 10/28/2009
SSN: xxx-xx-5500
Home: 415-968-4356

Sex: Female
Age: 15 yrs
Lang: English
Work: HM

Reg Sts: Ver
Email: alyssa@mail.com
Intrpr: No
Mobile: 415-444-1234

Temporary Address:
Confidential Address:

Future Past **Active Requests** Finalized Requests

| ID | Days Sin... | Create Dt | Start/Req Dt | Sent to Pt? | Status | Type | Proc/Visit Type | Responsible Dept | Request Notes |
|---------|-------------|------------|--------------|-------------|------------|-------|--|-------------------|---------------|
| 2884572 | 1589 | 12/25/2020 | 04/25/2025 | | Need Sched | Other | EXTRACTION on tooth 2 PR PARTIAL PULPOTOMY FOR APEXOGENESIS - PERMANENT TOOTH WITH INCOMPLETE ROOT | SOD GEN DENT PARN | |

New 30-Day Reminder for Scheduled Appointments

Audience: Enterprise-wide

Reason for Change: Since appointments are often made far in advance, leadership has decided to send an appointment reminder 30 days prior to the appointment.

Description & Workflow:

Patients who have opted in to receiving automated appointment reminders will now receive a 30-day reminder of their appointment. Patients will not be able to confirm their appointment via the message and will be asked to contact the clinic to make changes.

B9A2:UCSF Health
 Mary, you have an upcoming appointment on 05/25 at 2:00 PM PDT. To make any changes, please call 415-514-6420. Details: <https://mchrt.io/30wsSioHTX4m0ErC7bA>.

Reply STOP to opt out.

Name of Build Analyst: Tiffany Messer

Clinical Appointment Reminders

Audience: Enterprise-wide

Reason for change: Upgrade

Description & Workflow: The 'Clinic Appointment Reminders' communication preference, which governs when and how Quick Reminders are sent, will now default to 1 day instead of 2 hours.

Communication Preferences

▼ Appointment Notifications

| Appointment Information | — | — | | | — | — | — | — |
|--|---|---|---|---|---|---|---|---|
| Appointment Letter | | — | — | — | — | — | — | — |
| Appointment Reminder | — | | | — | — | — | — | — |
| Clinic Announcements | — | — | | | — | — | — | — |
| Clinic Appointment Reminders | — | — | | | — | — | — | — |
| Amount of time before appointment to send reminder: <input type="text" value="1 day"/> | | | | | | | | |
| Hospital Stay Notification | — | — | | | — | — | — | — |
| Scheduling Ticket | — | — | | | — | — | — | — |
| Status Changes | — | — | — | — | — | — | — | — |
| <div> <div>Scheduled <input checked="" type="checkbox"/></div> <div>Changed <input checked="" type="checkbox"/></div> <div>Canceled/Rescheduled <input checked="" type="checkbox"/></div> <div>Missed <input checked="" type="checkbox"/></div> </div> | | | | | | | | |

Name of Build Analyst: Tiffany Messer

Financial Counselors

Auth/Cert: Bed Day Report has a New Look

Financial Counselors

You can see more information in the Bed Days section, including a combined table of approved and denied days, including pending days and days that don't require authorization. Use the History link to see an audit trail of information about the authorization's status changes.

Bed Days: E-MEDI-CAL/MEDI-CAL

Member/Insurance ID: 3242523523 (Always effective) Auth Snapshot

Tonight
⚠ Not Documented

In Progress
⚠ Nights Not Documented: 806
⌚ Entries Pending Authorization: 1
📄 Entries Pending Appeal: 1

Next Review Date
📅 +1 Day

ED Arrival Date
-

Observation Admission Date
-

Inpatient Admission Date
1/19/2023 9:07 AM

Discharge Date
-

Authorizations

+ Add Entry

Dates

Auth Status

Reference #

Auth #

Day Type

🕒 History

✎ Edit

5/8/2025 – 5/14/2025

⌚ Pending

PENDING

🕒 History

✎ Edit

4/30/2025 – 5/7/2025

✅ Authorized

APPROVED

🕒 History

✎ Edit

4/25/2025 – 4/29/2025

📄 Denied

DENIED

🕒 History

✎ Edit

Appealed: Missing appeal decision

4/1/2025 – 4/24/2025

🚫

APPROVED

🕒 History

✎ Edit

Avoidable Nights (0)

+ Add Avoidable

Close

Previous

Next

The Auth Status field is new and used to record the authorization status for each bed day entry. It is a required field, but both the **Auth Status** and the **Day Type** fields should be filled out. The Auth Status field can be updated directly from the table, instead of going into the entry itself.

See Auth/Certs from Merged Hospital Accounts in the Referral Sidebar

Inpatient Financial Counselors

You can now open and view previous auth/certs from merged hospital accounts in the Referrals sidebar, helping you find notes from previous authorization requests and make more informed decisions about how to handle the new authorization.

Hospital Logistics & EVS

Avoid Accidental Advancement of a request Status in Logistics Technician View

UCSF EVS Staff

The status progression buttons in Logistics Technician View now have a brief delay between clicks as the user progresses the status. This change is intended to reduce the number of accidental clicks that advance requests. Since the In Progress and Complete buttons are in the same position on the screen, when a technician clicks **In Progress**, the system advances the status and temporarily disables the Complete button from being clicked for one second.

View Additional Information in the Logistics User Productivity Log

All Sites EVS and Transport

Click on a job's status in the Logistics User Productivity report to see the assignment or unassigned source and the IDs of the associated job, group, and shift.

Bed Clean

352

352

352

353

Planned Bed Clean, TXC Cardio / TXC Room A / TXC A-2

Assigned Bed Clean, TXC Cardio / TXC Room A / TXC A-2

Acknowledged Bed Clean, TXC Cardio / TXC Room A / TXC A-2

Unassigned Bed Clean, TXC Cardio / TXC Room A / TXC A-2

Job HLR ID: 66226

Group HLR ID: 67750

Shift SFT ID: 505

Assignment Source: Manual

Job HLR ID: 66226

Group HLR ID: 67750

Shift SFT ID: 505

Unassignment Source: Manual

Edit the Number of Technicians on In Progress Jobs

Transport Supervisors

If needed, you can change the number of technicians required on an in-progress job using the Request Editor, provided the job doesn't have any completed assignments and the required technicians aren't changed to fewer than originally requested.

Bed Clean

Editing Bed Clean

Location: 962-B1

Priority: Stat High **Normal** Low

Protocols:

- ☒ Airborne
- ☐ Airborne-Droplet
- ☐ Contact
- ☐ Contact and Airborne
- ☐ Contact and Droplet
- ☐ Contact-Airborne-Droplet
- ☐ Contact-Airborne-Droplet-Neutropenic
- ☐ Contact-Neutropenic
- ☐ COVID-19
- ☐ Deceased Patient
- ☐ Droplet
- ☐ Enteric Contact
- ☐ Fall Precautions
- ☐ Neutropenic
- ☐ Neutropenic-Airborne
- ☐ Neutropenic-Airborne-Droplet
- ☐ Neutropenic-Contact-Airborne
- ☐ Neutropenic-Contact-Droplet
- ☐ Neutropenic-Droplet
- ☐ Terminal/High Clean

Number of Technicians: 2

+ Comments

#2892

Accept Cancel

No warnings or errors

Hide Completed Assignments in Grouped Jobs

Marin Logistics Users

Logistics users can use a new personalization setting to hide completed jobs in a group to help them focus on active jobs and see more relevant information at a glance. This setting is available in the Technician View, My Jobs in Rover, and the Command Center.

Technician View:

Shift

Hello, Transport ADT

Assigned: 1714 min

Start: 11/5 13:27*

Personalization

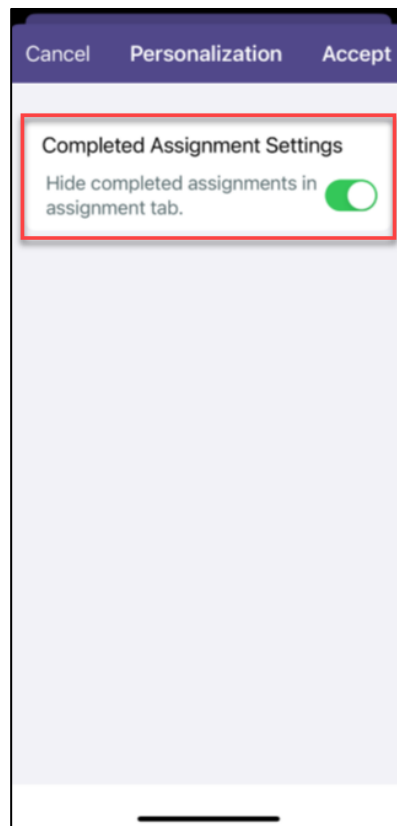
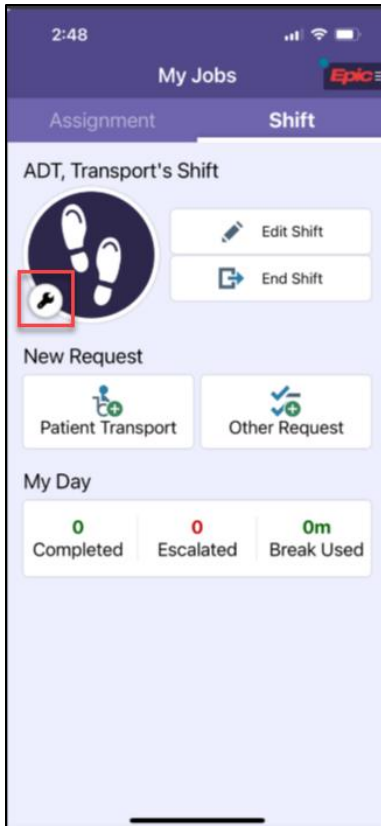
Completed Assignment Settings

Hide completed assignments in assignment tab Show completed assignments in assignment tab

Accept Cancel

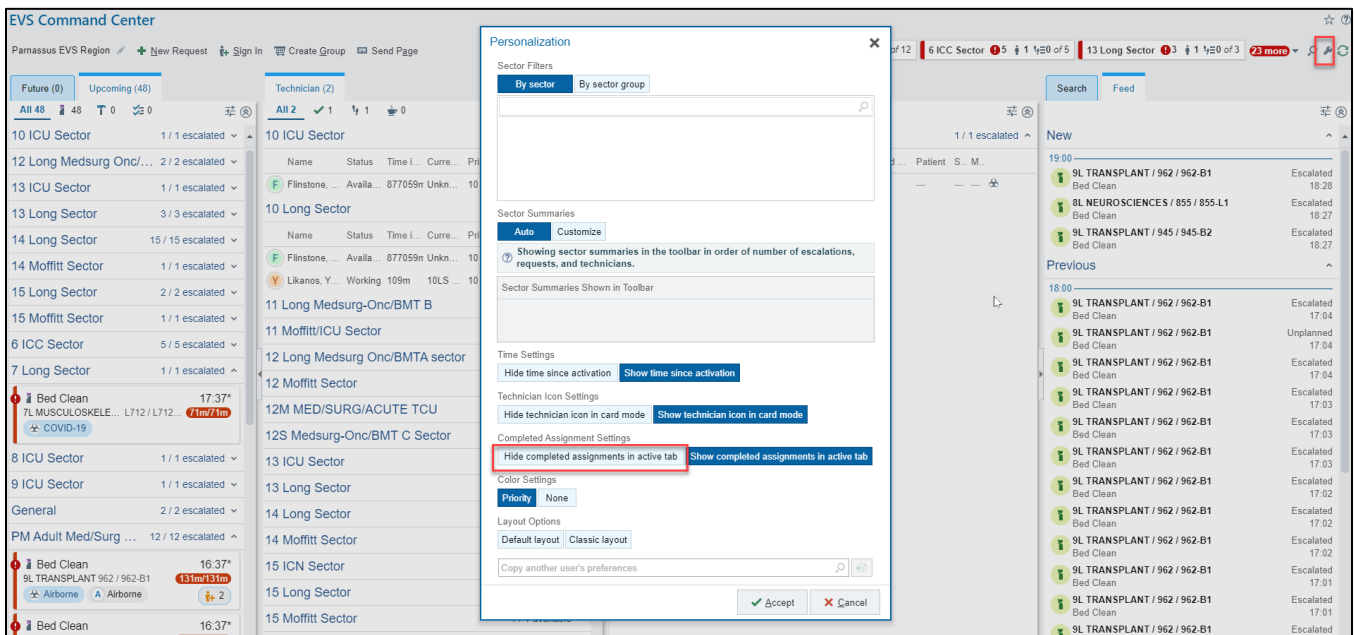
0 Completed 0 Escalated 0 min Break Used

My Jobs in Rover



With this setting turned on in the Command Center, managers see an eye icon that indicates there are completed jobs that are hidden in the group. This helps managers narrow down which jobs are outstanding in the Command Center.

Command Center:



Transfer Center

Refreshed Transfer Center Request List

Pediatric and Adult Transfer Center Staff

Find information about a transfer request more easily in the updated Transfer Center request list. The request list has been changed to a sidebar report that can be easily expanded or collapsed entirely. The main action buttons: New Call, New Request have been moved to the top of the screen.

The screenshot displays the Epic Transfer Center interface. At the top, there is a navigation bar with tabs for 'TC Manager', 'ED Track Board', 'All Areas', 'Master Daily Schedule', and 'Patient List'. Below this, a sub-header 'Transfer Center' contains three buttons: 'New Call', 'New Request', and 'My Requests', which are highlighted with a red box. The main area is divided into two sections. The left section, titled 'Transfer Center', contains a list of transfer requests. The right section, titled 'Transfer Information', provides details for a selected request. The 'Transfer Information' section includes tabs for 'Initial Information', 'Transfer Info', 'Referring Info', and 'Location'. The 'Transfer Info' tab is active, showing fields for 'Transfer Type' (Inpatient, Emergency, Obstetrics, Advice), 'Expected Arrival' (4/22/2025), 'Transfer Reason' (No Capability), 'Diagnoses' (stroke), and 'Free Text Diagnoses'.

| Request ID | Patient Name | DOB | Age | Time | Status | Referring Info |
|------------|--------------------------|------------|-----|---------|-----------|----------------|
| 63 | Zztest, Adtaccessnav | 03/14/1978 | 47y | 3:14 PM | Inpatient | Referring F... |
| 10 | Zztest, Adt | 01/18/1988 | 37y | 2:23 PM | Inpatient | JOHN MUL... |
| 0 | Scripting, ChangedVThree | 12/19/2000 | 24y | 8:41 AM | Inpatient | HEALTH - ... |
| 0 | Clinichold, Test | 03/08/1978 | 47y | 8:33 AM | Inpatient | CONCORD ... |

Transfer Information

Transfer Type: ☒ Inpatient, ☐ Emergency, ☐ Obstetrics, ☐ Advice

Expected Arrival: 4/22/2025

Transfer Reason: No Capability

Diagnoses: stroke

Free Text Diagnoses:

Save Time with Timed Reminder Favorites

Pediatric and Adult Transfer Center Staff

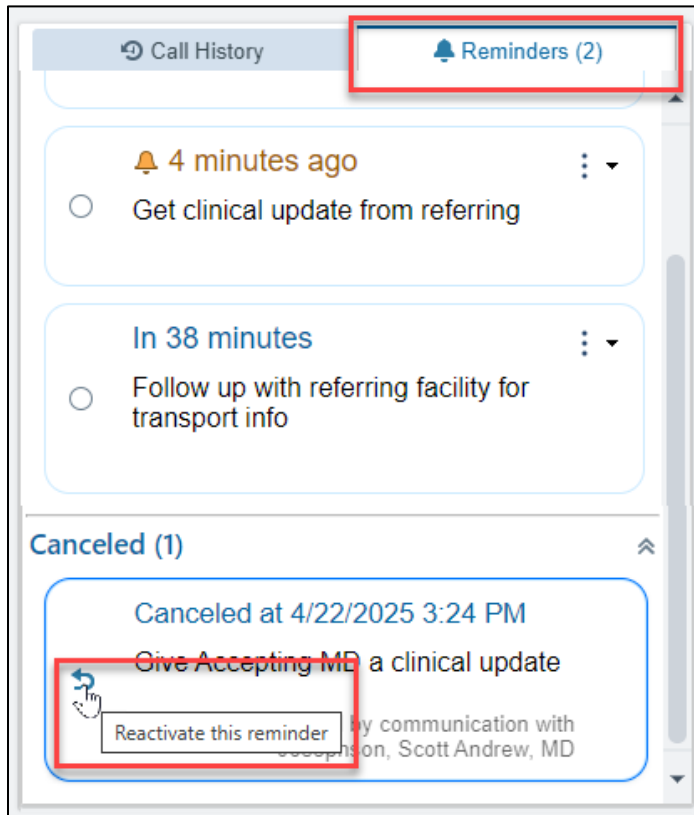
Transfer center users can now set timed reminders to help track and follow up on important tasks. To make documentation even faster, you can save commonly used reminder details as favorites.

The screenshot displays the Epic Transfer Center interface. At the top, a patient card for Malfoy, Lucius is shown with details like MRN, date of birth, and request status. Below this, a navigation bar includes tabs for Initial Information, Transfer Info (selected), Referring Info, Location Selection, MD Acceptance, Clinical Info, Bed Release, Transport, Documents, Travel Screen, and Infections. The 'Transfer Info' section is active, showing fields for Transfer Type (Inpatient selected), Expected Arrival (4/22/2025), Transfer Reason (No Capability), and Diagnostics (stroke). An 'Add Reminder' dialog box is open, allowing users to set a date (5/4/2025), time (2:13 PM), and duration (10 min). It also includes a text field for the reminder message ('Call for Paperwork'), priority selection (Normal, High, Critical), and options to add users to remind or request owner. A red box highlights the 'Save as Favorite' button at the bottom of the dialog. A red arrow points from this button to the 'Reminders' section in the right-hand pane. This section, titled 'To-Do (2)', lists two reminders: 'In 14 minutes Call for papaerwork' and 'In 30 minutes Give Accepting MD a clinical update'. The 'Reminders' tab is selected in the right-hand pane, and a red box highlights it.

Reduce Clicks when Reactivating Automatically Canceled Timed Reminders

Pediatric and Adult Transfer Center Staff

Automatically canceled reminders now show up in the **Reminders** tab in Transfer Center. If automatically cancelled, they can be reactivated to save time and avoid re-entering the same.

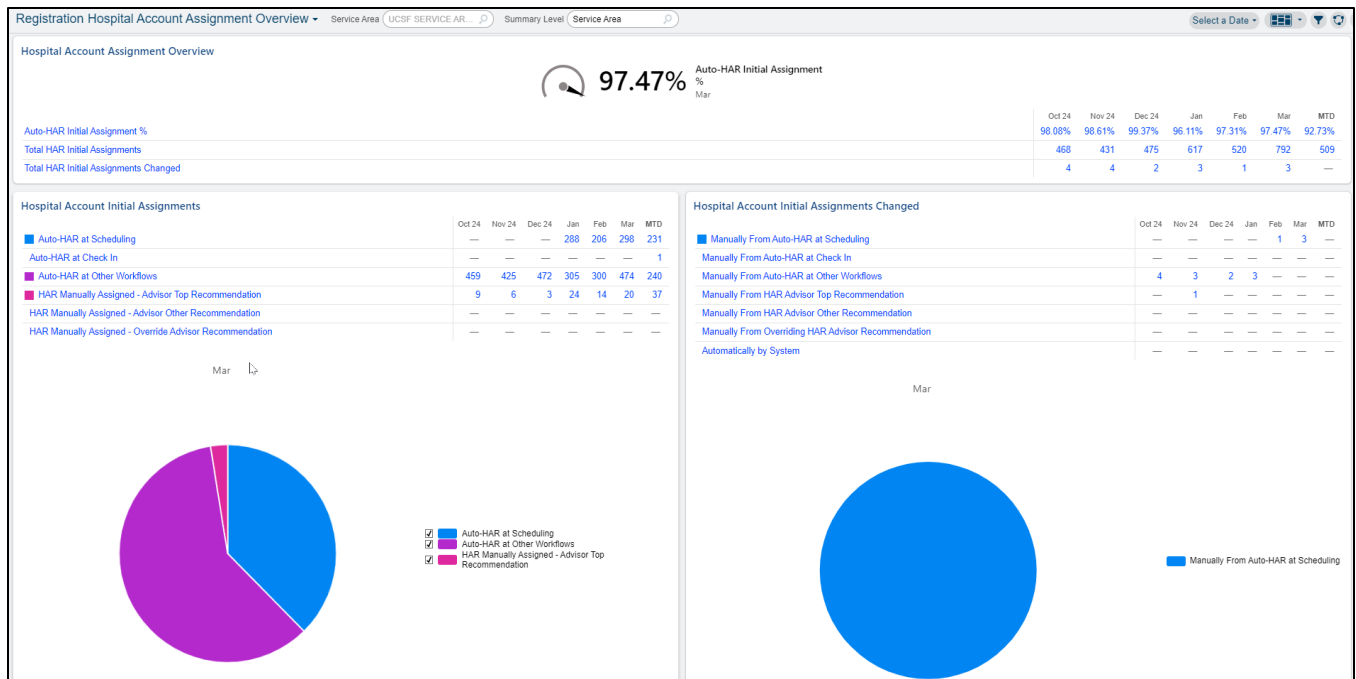


Reporting

Monitor Hospital Account Assignment Metrics with New Dashboard

Patient Access Managers and Admin Staff

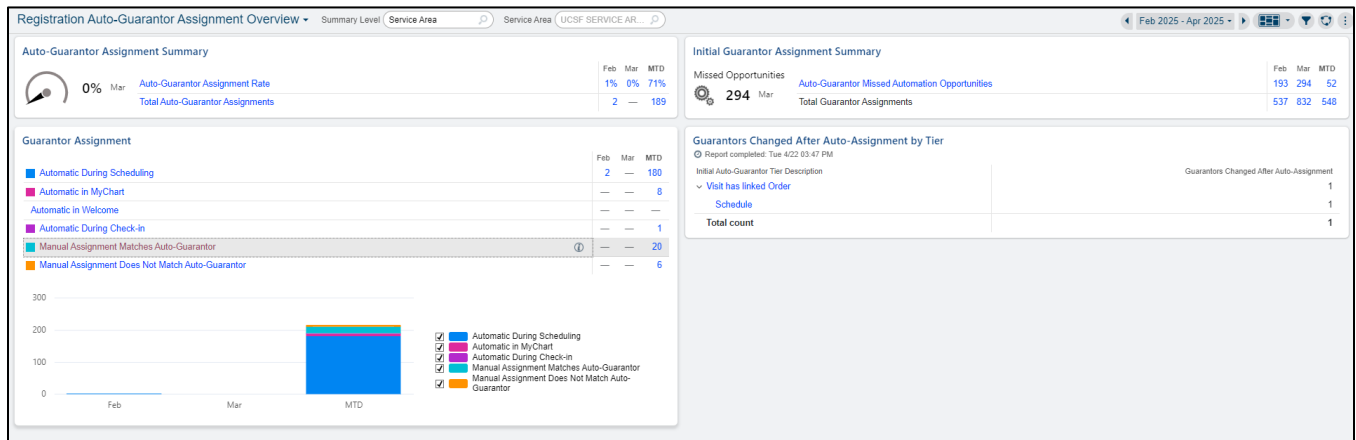
Check how efficiently hospital accounts are being assigned using the Registration Hospital Account Assignment dashboard. See how many hospital accounts are assigned automatically or using hospital account advisor recommendations.



Monitor Guarantor Assignment Metrics with a New Dashboard

Patient Access Managers and Admin Staff

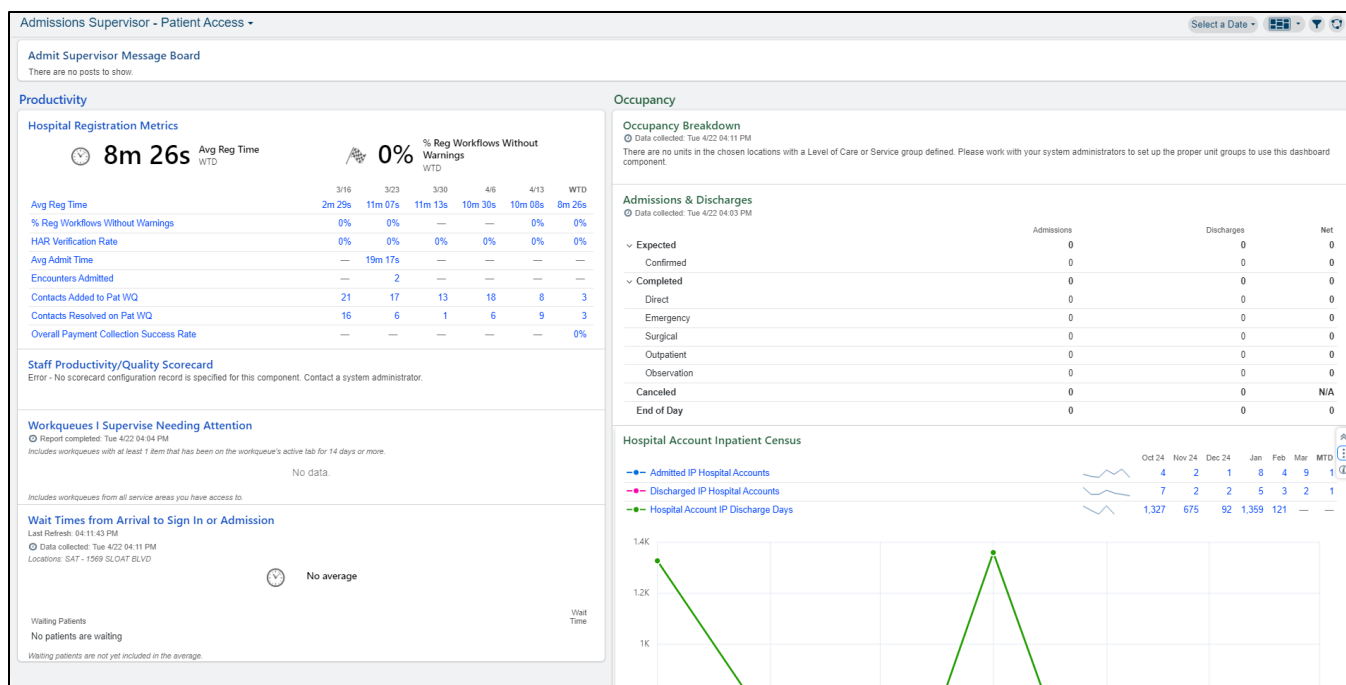
Track how guarantors are being assigned and identify opportunities to improve auto guarantor assignment, using the Registration Auto Guarantor Assignment Overview dashboard.



Stay Updated on Your Patient Access Productivity with Registration Dashboards

Patient Access Managers and Admin Staff

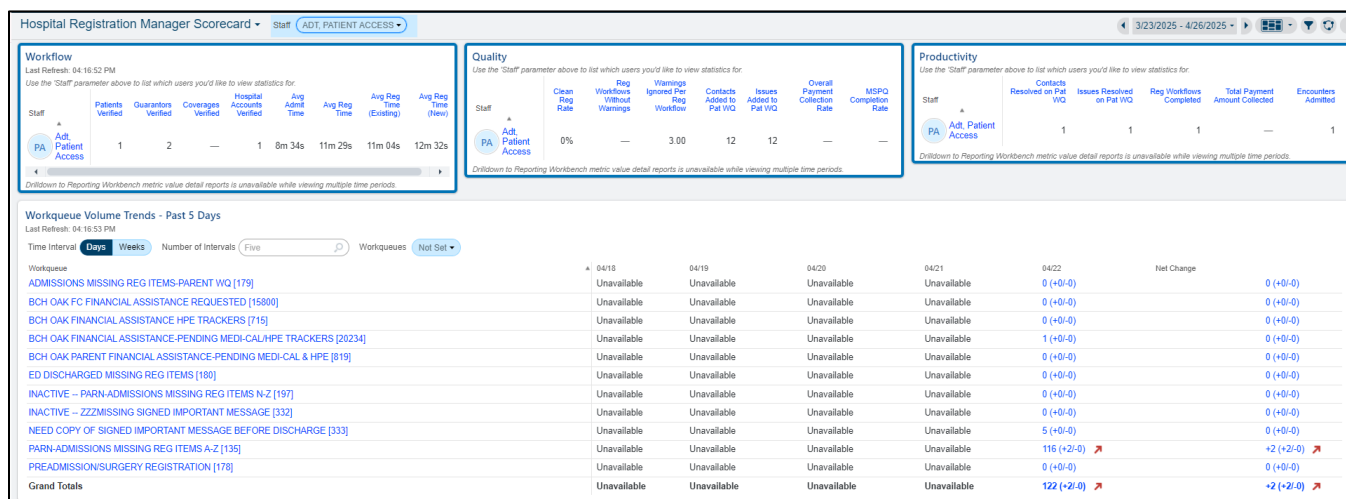
Monitor auth/cert completion, workqueue volume, and productivity using the updated Auth/Cert Overview dashboard.



Track Your Registration, Scheduling, and Referrals Staggs Productivity with Scorecards

Patient Access Managers and Admin Staff

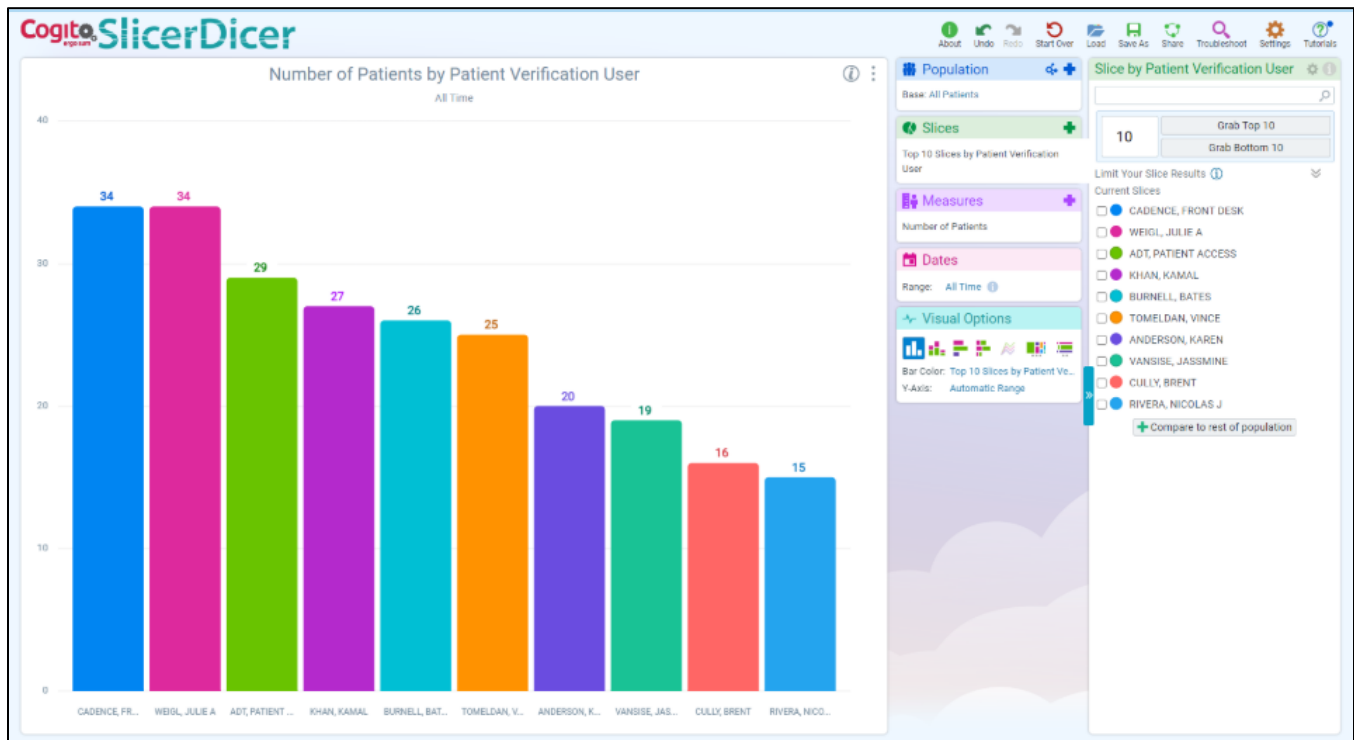
Check on the efficiency of front-end workflows with new user and manager scorecard dashboards for Hospital Registration



Analyze Registration Verification Users with New SlicerDicer Filters (Slice and Dice By Registration User)

Patient Access Managers and Admin Staff

Dig in to find the last user to verify information, check in a visit, or check out a visit using new SlicerDicer filters in the Patients, Hospital Accounts (HB & PB), Visits (Professional Billing), Hospital Admissions, and Visits data models.



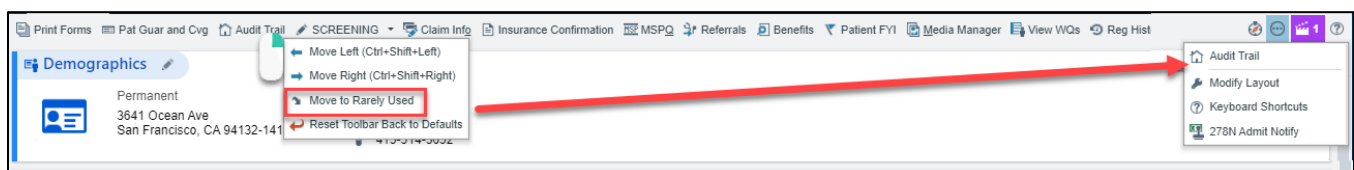
Good to Know

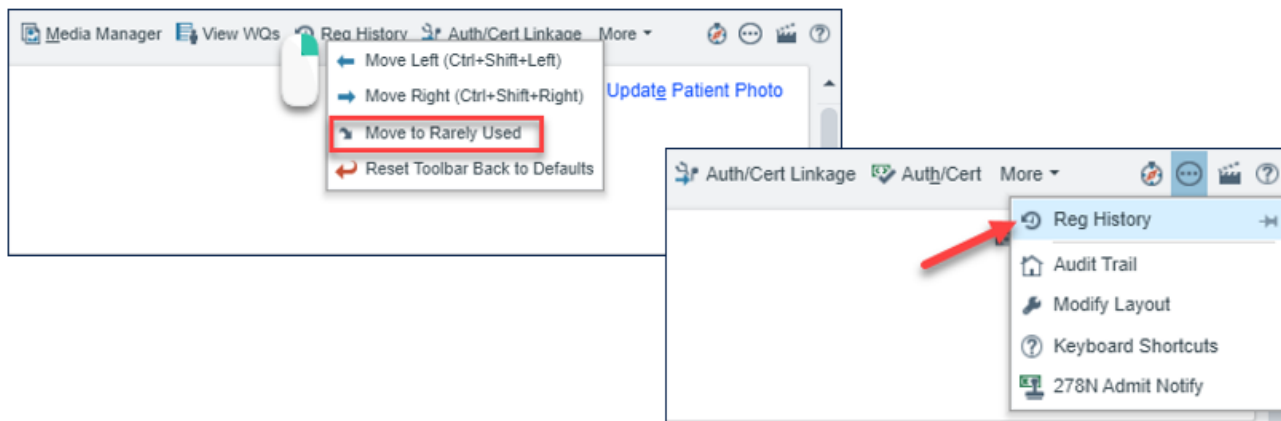
Tuck Away Rarely Used Buttons in the Dots Menu

All Patient Access Users

Simplify your toolbars by moving buttons that you don't typically use to the Dots menu. Right-click on a toolbar button and select Move to Rarely Used to move it to the Dots menu.

Not all toolbars have a Dots menu, but many common activities do, including Registration and Billing Information activities.



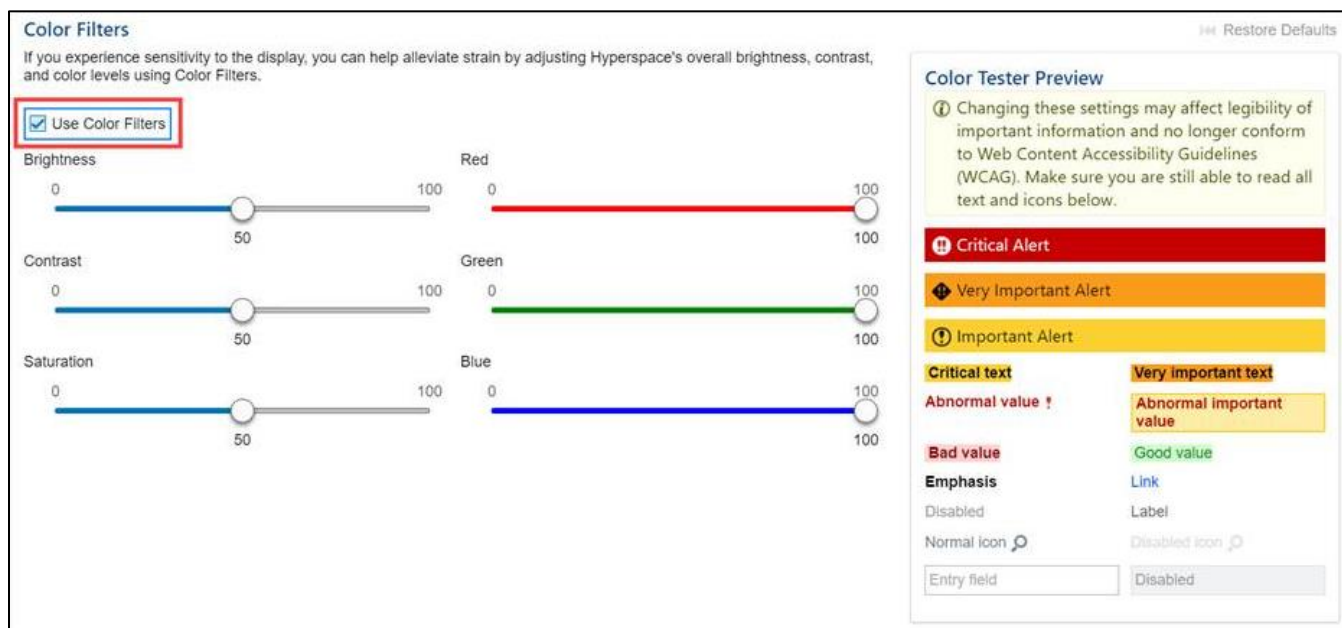


Change the Color of Your APeX Display

All Users

If you are colorblind or sensitive to certain shades or contrasts, you can now adjust the brightness, contrast, saturation, and red, green, and blue values that you see in APeX. To adjust the settings, open the Accessibility activity (search: Accessibility), select the checkbox to enable Color Filters, and then drag the sliders to modify the way that APeX appears. If you want to return to default values, click Restore Defaults.

If you change your colors substantially, be sure to double-check your key workflows to ensure the system appears as expected.

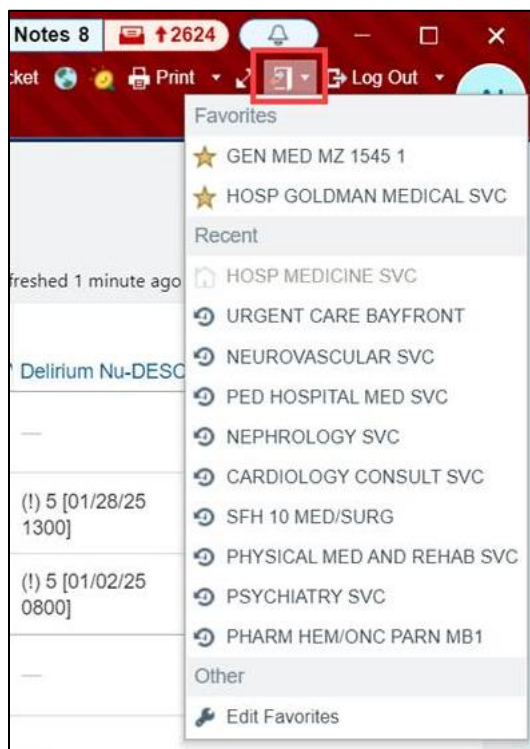


Fewer Clicks to Switch Departments

All Users

Switch departments from the Recent and Favorites Departments menu in APeX.

To modify your list of favorite departments, click Edit Favorites and drag departments from the Recent Departments list into the Favorite Departments list, or search for other departments using the Department Search field. Add or remove a favorite department by clicking its star icon or using **Shift+Space**.



APeX New Hire Training Schedule

Need to see when the next APeX Training class offering? [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 for 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).