

## Ambulatory APeX Monthly Updates – January 2026

### All Ambulatory Users

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**Unless otherwise indicated, these changes go live on:**

**January 13, 2026**

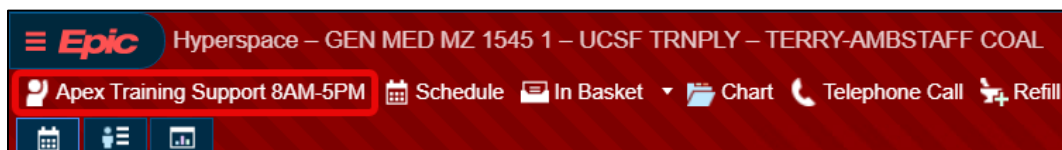
## APeX Live Zoom Support Available to All Users

**Audience:** All Users

**Reason for Change:** Live APeX Zoom support is now available to all APeX users

**Description & Workflow:** Did you know that real-time APeX-related assistance is just a click away? Whether you need guidance navigating APeX, troubleshooting issues, or optimizing workflows, APeX trainers are ready to help.

- **When:** Monday through Friday, 8:00 AM – 5:00 PM
- **Where:** Accessible directly in APeX
- **How:** In the upper left corner of the APeX window, below the Epic button, click **Apex Training Support 8am – 5pm** to be connected to an APeX Trainer via Zoom.



SME: APeX Training Team; Analyst: Chad Bingo

## Temporary Closure of Live APeX Zoom Support

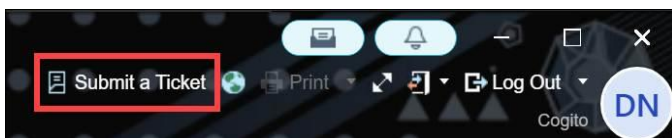
**Audience:** All Users

**Reason for Change:** Support of organizational initiative

**Description:** In support of an organizational initiative, the live Zoom Support line within APeX will be unavailable on **Tuesday, January 20**, and **Wednesday, January 21**.

We appreciate your patience and understanding as we work to enhance our APeX training services. During this time, we encourage you to contact the Help Desk for any training-related inquiries.

- Submit a ticket directly within APeX by clicking **Submit a Ticket**
- Call the Help Desk at **415-514-4100**



Regular live Zoom support hours will resume on **Thursday, January 22**. Thank you for your continued support as we strive to improve your experience with APeX.

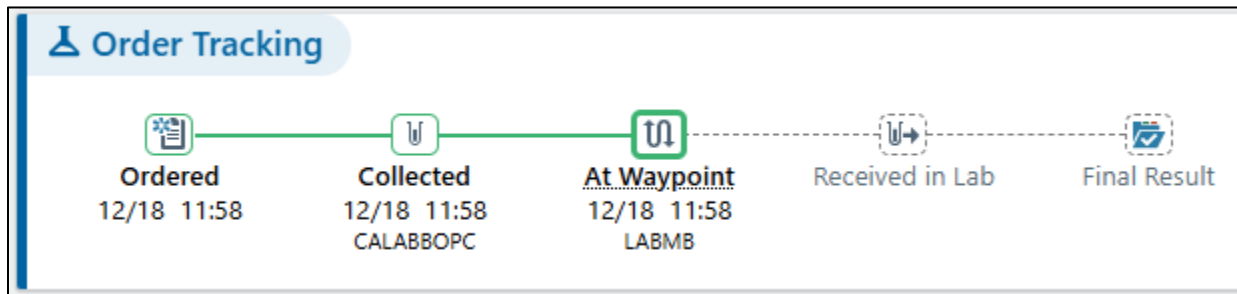
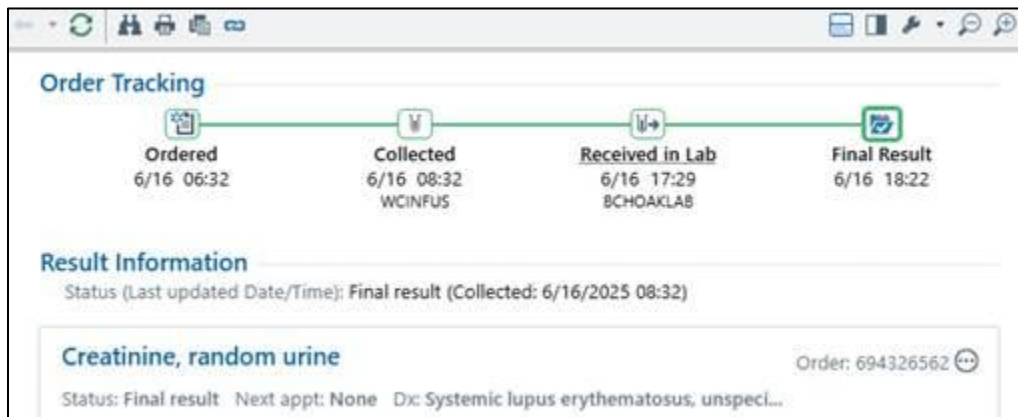
Informaticist/SME: Tania Walker, Health IT Training Director

## Order Tracking Now Available for Lab Tests

**Audience:** All users viewing lab results in the Labs tab in Chart Review or Results Review

**Reason for Change:** To make the status of pending UCSF Lab facilities test results clearer. The “Order Tracker” section will display status as the lab is ordered, collected, received, and eventually resulted.

**Brief Description & Workflow:** The “Order Tracking” section will display the status of lab tests (Ordered, Collected, Received, and Final Result). Users can see the order tracker by selecting a test in the Labs tab and when viewing order reports.



*Informaticist/SME: Dr. Katie Grouse; Build Analyst: Chad Bingo*

## Imaging in Chart Review Update

**Audience:** All APeX Users

**Reason for Change:** Imaging in Chart Review will be displayed by “Last Updated” Column

There have been multiple updates to the Imaging tab of Chart Review over the last several months. Due to ongoing difficulties with identifying ordered, scheduled, and completed exams, we are restoring the Last Updated column, which will once again become the default for imaging sorting. The Last Updated column will display the last time an imaging order was acted upon, either by date ordered, date scheduled, or last update to the radiology status.

**Brief Description & Workflow:** The Last Updated column will be added and set as the default sorting column for imaging studies. This update will help users more efficiently identify studies that are ordered, scheduled, and completed.

The End Exam column will remain available and continues to be the most reliable indicator of exam completion date. Users may manually select the End Exam column if they prefer to sort studies specifically by completion date.

Ordered	Result Date	End Exam	Last Updated	Exam Name	Status
12/03/2025			12/18/2025 ...	CT Biopsy Neuro Vertebral Spine	Scheduled
11/26/2025			12/01/2025 ...	IR CT Guided Aspiration	Ordered
11/13/2025	11/13/2025	11/13/2025	11/13/2025 ...	XR Scoliosis Study 2 or 3 Views	Final
11/13/2025	11/13/2025	11/13/2025	11/13/2025 ...	Lumbar Spine Flexion and Extension	Final
11/13/2025	11/13/2025	10/21/2025	10/21/2025 ...	XR Lumbar Spine (Storage Only)	Final
10/20/2025	10/20/2025	09/08/2025	09/08/2025 ...	MR Lumbar Spine with and without Contrast (Storage Only)	Final
08/28/2025	08/28/2025	08/28/2025	08/28/2025 ...	XR Finger, Right	Final
08/28/2025	08/28/2025	08/28/2025	08/28/2025 ...	XR Wrist 3 Views, Right	Final

Informaticists: Dr. Katie Grouse, Build Analyst Leanne Markle

## TIMED Labs - AMB Ordering Guidelines

**Audience:** All AMB Users

**Reason for Change:** Clarification and Reminder - removal of **STAT** priority option in some lab tests and how to order **Timed** labs.

**Description & Workflow:**

### STAT or Time Critical Lab Draws

In the AMB setting on lab orders, The *Priority=STAT* field communicates urgency to the lab processing team

**However, not all lab tests can be processed as STAT. For these tests, the priority option of “STAT” has been intentionally removed.**

**If the *Priority=STAT* is not available, but the lab draw itself is time-critical** (i.e. needs to be at a very specific time, for example - drug trough levels)

1. Select Priority=TIMED
  - If there is not a radio button of TIMED, locate by clicking on the magnifying glass in the Priority Box

2. Enter the desired draw time in the discrete time field.

**Do not use:**

1. *Priority=Routine* with the time entered. Beaker groups *Routine* labs and will auto-adjust the draw time, resulting in an incorrect draw time

**Voriconazole Level** [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: 1/8/2027 [1 Month] [2 Months] [3 Months] [4 Months] [6 Months] **1 Year**

Priority: **Routine** [Routine]

Class: [ASAP] [ASAP (within 72 hrs)] [Planned (set expected date)] **Routine** [Routine (within 14 days)] [Scheduled (set expected date)] [STAT] [Timed]

Add-on: [ ]

Lab: [ ]

Specimen Type: [ ]

Specimen Source: [ ]

Process Instructions: [ ]

Type: [ ]

Specimen Site/Additional: [ ]

Container details: [ ]

Patient requests delaying MyChart release of this result to allow for discussion with their clinician prior to electronic availability.  
[Yes, delay 5 calendar days] [No, release immediately]

Comments: [Add Comments]

Reference Links: [UCSF Lab Manual] [BCH Oakland Lab Manual]

Additional Order Details

[Next Required] [Accept] [Cancel]

SME/Informaticist: Shagun Arora

## New MyChart Feature: E-Sign for All

**Audience:** All Users

**Reason for Change:** To allow patients and proxies to electronically sign documents even if they do not have an active MyChart account, reducing delays and follow-up.

**Brief Description & Workflow:** Epic now supports e-Signature requests that do not require an active MyChart account. Patients can receive an email or text message (sent to verified contact information) with a secure link to review and sign. They access a one-time MyChart session by confirming demographic details instead of using a MyChart username and password. For staff, the e-Signature sending workflow is unchanged.

## Feature Highlights

- **Improved Accessibility for Patients**
  - Patients can sign using an email or text link sent to verified contact information.
  - The link opens a one-time MyChart session after demographic verification.
- **Support for Non-MyChart Users**
  - Expands access for patients and proxies who do not use MyChart regularly.
- **No Workflow Changes for Staff**
  - Staff send e-Signature requests the same way as they do today.

## How It Works for Non-Active MyChart Users

1. The patient receives an email or text message with a unique link.
2. The patient clicks the link and confirms their identity using demographic information.

Verify your identity

Personal Information

Confirm information for Tom

\* Indicates a required field.

\* Date of Birth  
MM/DD/YYYY  
This is required

\* ZIP Code

Two-Step Verification

We've sent a security code to \*\*\*-\*\*-1766.  
[Learn more](#)

Enter your code below to continue.

\* Enter Code  
203415

Verify

Didn't receive the code?  
[Resend code](#)

3. The patient reviews the document and completes the e-signature in the one-time session.

Powered by MyChart MyChart

My Documents

Save time with UCSF MyChart

Sign up for UCSF MyChart to access your personal healthcare information with your computer or smartphone.

Create account

Documents to sign

E-Consent-Cancer Directed Therapy

Sent to you on 10/22/2025

Review and sign

Build Analyst: Alexis Regner

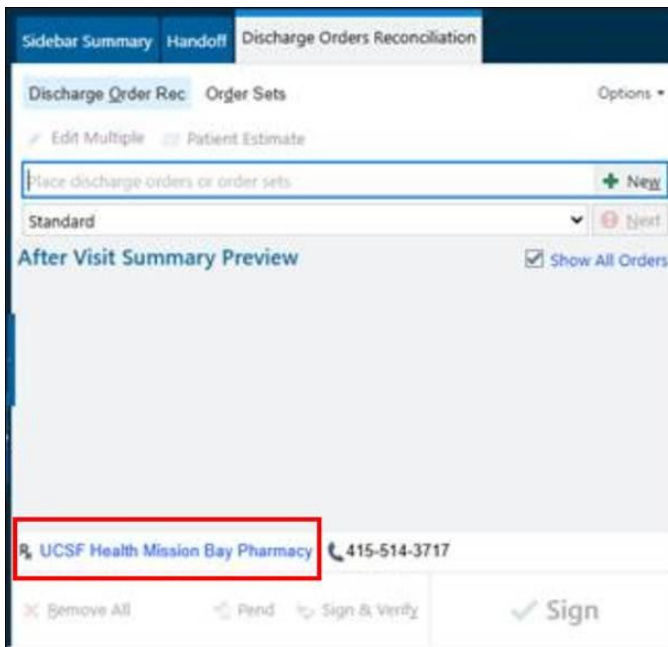
## Default Pharmacy for Discharge Prescriptions at UCSF Mission Bay and Parnassus Hospitals

**Audience:** UCSF Mission Bay and Parnassus Hospitals only.

**Reason for Change:** Research shows that ensuring patients receive their prescriptions before discharge significantly reduces readmissions and improves medication adherence.

**Brief Description & Workflow:** UCSF Outpatient Pharmacies are uniquely positioned to eliminate barriers due to their full integration with APeX/Epic, which streamlines communication and provides clear visibility of prescription status. With this update, the internal pharmacy will be set up as the default pharmacy unless patient has an existing preferred pharmacy.

**Future State:** Default pharmacy selected for discharge prescriptions is *UCSF Health Parnassus Pharmacy* or *UCSF Health Mission Bay Pharmacy*.



If a preferred pharmacy is available for the patient at Mission Bay or Parnassus, it will continue to be selected.

*SME: Myra Pascua, PharmD; Informaticist: Kendall Gross, PharmD, Neha Gandhi, PharmD, John Kapisarov, PharmD; Analyst: Melissa Chen*

## Update to Depression Screen Recommendation Column on Schedule

**Audience:** Users who use the column with header “Is PHQ Due?” in the Schedule Activity

**Reason for change:** To align the column with Depression Screen-related Care Gaps

**Brief Description & Workflow:** Currently, the “Is PHQ Due?” column on the Schedule does not consider Care Gaps. This can cause confusion if the column recommends something different from the patient’s Depression Screen-related Care Gaps.

However, since that column was created, different Care Gaps have been created that recommend different depression screenings (e.g., the PHQ-2 vs. the full PHQ-9). These Care Gaps make recommendations considering the patient’s prior completion and score history.

The column is being updated to reflect the status of the Care Gaps that apply to that specific patient. For example, if the patient is overdue for the “Annual Depression Screen” Care Gap, the column will recommend the PHQ-2 screening.

*Analyst: Marty Schroeder, Healthy Planet*

## Updates to Conversation Display for In Basket Results Messages

**Audience:** All Users

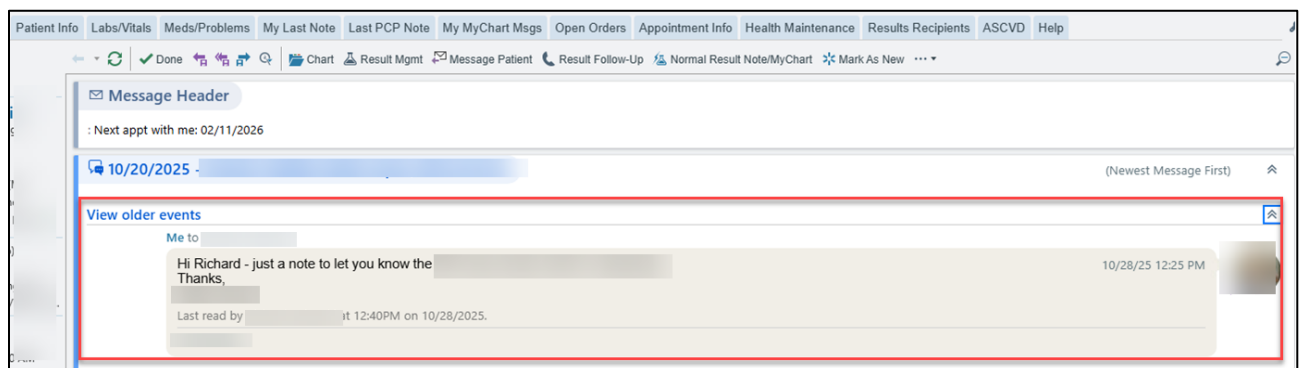
**Reason for Change:** To realign with Epic foundation and ongoing In Basket improvement efforts.

**Brief Description & Workflow:** Epic updated how the conversation thread displays for In Basket Results messages. The goal is to reduce clutter and make it easier to understand the context before you act on a result.

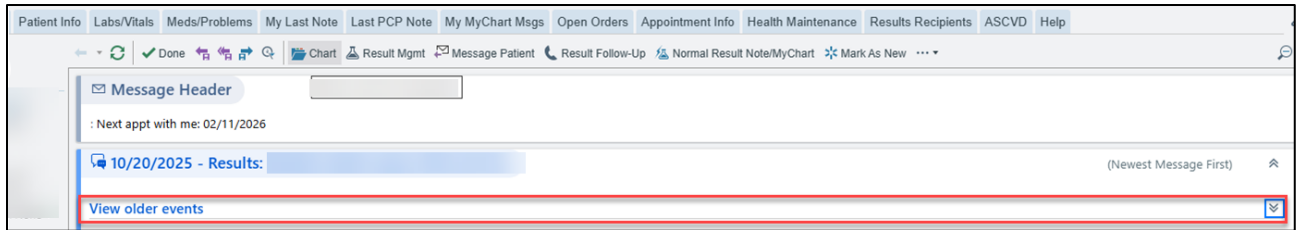
**Go-Live Date:** February 10, 2026

What’s changing:

- The conversation thread now appears above the result so you can quickly see recent communication related to that result.



- Appointment information and questionnaire submissions are filtered out to reduce clutter
- Only the three most recent events stay expanded. Anything older is automatically collapsed.



**Why it matters:**

- If a patient uses “Ask a Question” in MyChart before you review the result, that message will be visible as part of the same conversation.
- This supports workflows like Result Follow-Up by keeping the discussion and the result together.
- If you want to focus only on the result, you can collapse the conversation using the expand/collapse arrow.

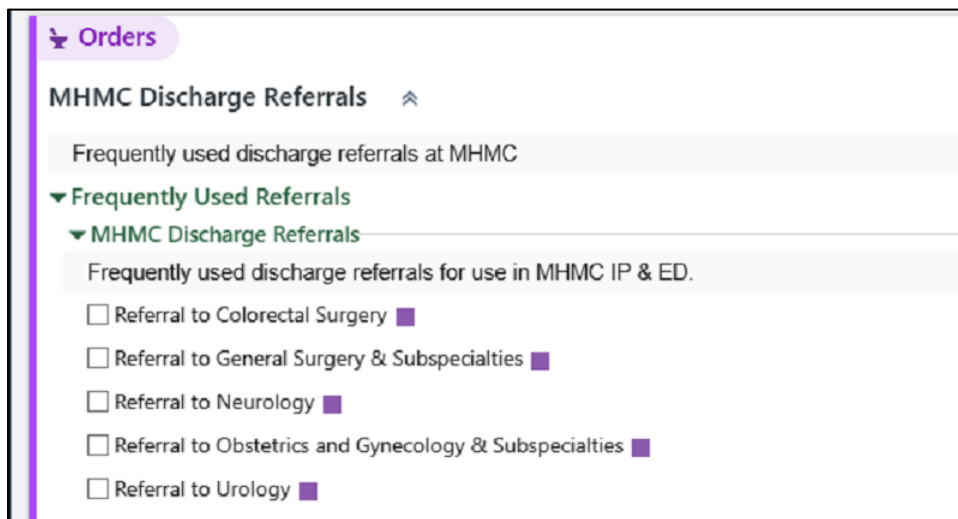
*Informaticist/SME: Dr. Katie Grouse; Build Analyst: Dolores O'Rourke*

## New Order Set for Discharge Referrals at MHMC

**Audience:** MarinHealth Medical Center (MHMC)

**Reason for Change:** To streamline the discharge referral process by grouping commonly used discharge referral orders into one Order Set.

**Brief Description & Workflow:** MHMC is piloting a new MHMC Discharge Referrals Order Set. To use it, go to Orders > Order Sets, then select MHMC Discharge Referrals. Choose the referral you need, complete the required questions, and click Accept. This Order Set includes only the referrals in the pilot. For referrals not included, continue using the current ordering workflow.



*Informaticist/SME: Brett Jones, MHMC IT Liaison; Build Analyst: Liz Clifton, APeX Ambulatory*

## Referral Updates

**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. Referral standardization will be an ongoing effort, with multiple specialty referrals going live each month.

### Referrals and Go-Live Dates:

#### Updated referrals:

- Referral to Primary Care & Subspecialties [REF24] (Previously, referral to Family Medicine) – effective 12/15/2025
- **Note:** This referral cannot be ordered as an Outgoing Referral for admitted patients.

#### Related referrals being deactivated:

- Referral to Internal Medicine & Subspecialties [REF40] – effective 12/15/2025

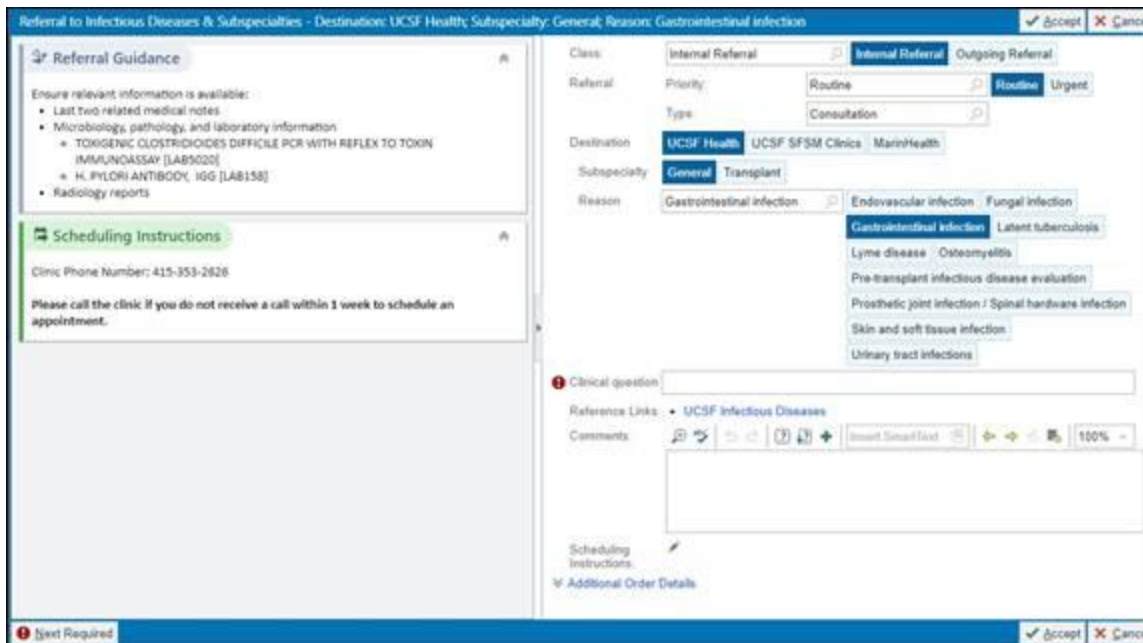
### Referral Improvements include:

- 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”

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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*


## Video Learning Library on Learning Home Dashboards

**Audience:** UCSF Providers






**Reason for change:** To give providers Quick How-To Videos on the most common workflows on the Provider Learning Home Dashboards. Each month explore new possibilities with new content in the Video Learning Library.

**Go-Live Date:** January 13, 2026

**Brief Description & Workflow:** Click **F1 for Help!** In the **Video Learning Library** component, click on the video to launch an It's Possible Video providing you with a quick how-to tutorial while in APeX.

 **Video Learning Library**  
 Last Refresh: 04:51:29 PM

**Quick How-To Videos**

-  [It's Possible - In Basket My Lists](#)
-  [It's Possible - In Basket Personalization](#)
-  [It's Possible - Postponing Messages](#)
-  [It's Possible - Result Management](#)
-  [It's Possible - QuickActions Result Notes](#)

Fri 12/19 04:57 PM - Wiggins, Sophia - (Edited)

## 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
January 8, 2026	12:10 pm - 1:00 pm
January 22, 2026	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)

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 Find upcoming classes in the [APeX New Hire Training Schedule](#)↗

 Browse guides and tip sheets in our [APeX Knowledge Bank](#)↗

 Stay current on upgrades and events at the [APeX Hub](#)↗

 Still have questions? Connect with the us directly at [ApeXTraining@ucsf.edu](mailto:ApeXTraining@ucsf.edu)↗

**Disclaimer: You are receiving this monthly update because your APeX access includes Ambulatory security. This may involve responsibilities such as reviewing patient charts, rooming patients, placing orders, writing notes, documenting in encounters, or supporting staff with Ambulatory workflows. The content in this update is provided for educational and informational purposes.**

**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).