

# Ambulatory Specialty/Other APeX Spring Upgrade 2026

## All Ambulatory Users

UCSF Health will upgrade to APeX/Epic November 2025 version on **Tuesday, May 12, 2026**

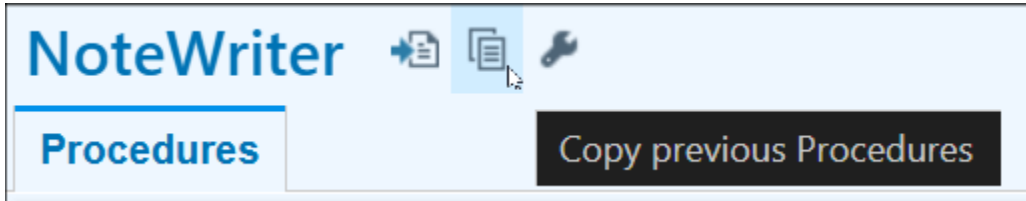
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# Documentation & Charting Efficiency

## Save Time with Copy Forward for Procedure Documentation

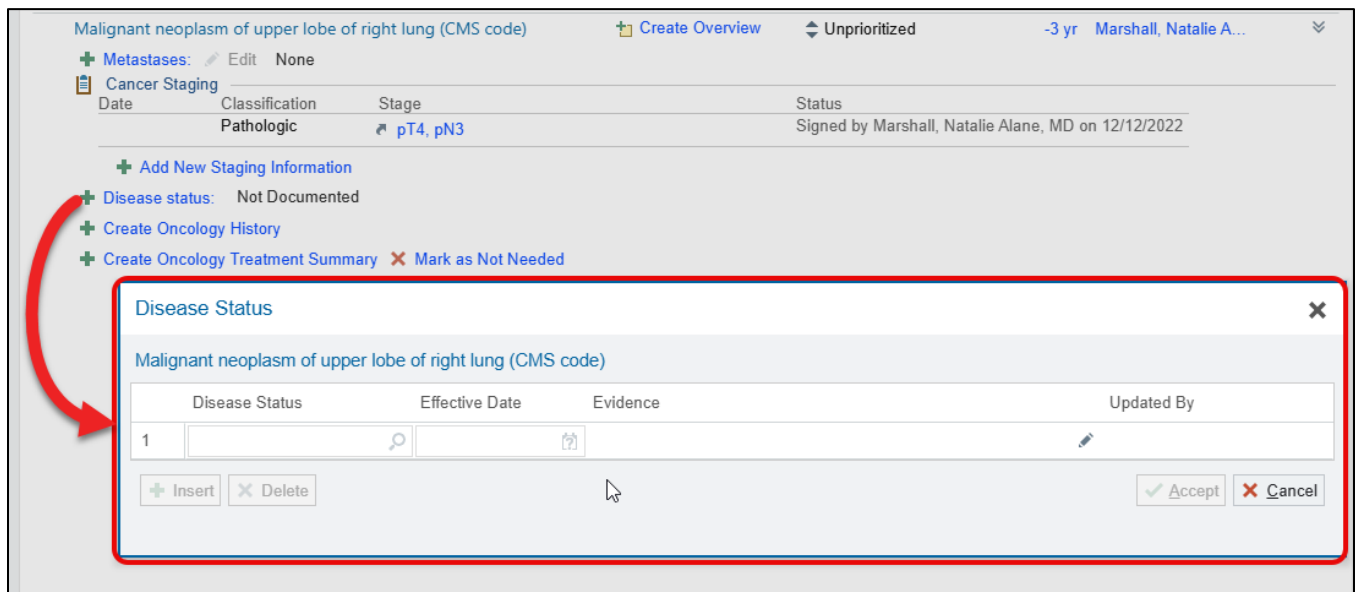
Clinicians can reduce repetitive documentation by copying forward procedure documentation from the ProcDoc SmartBlock. Now, when clinicians open ProcDoc SmartBlock, the copy previous button to pull forward past procedure documentation into their current note automatically shows for all procedures. Previously, this functionality was limited by procedure or profile.



The Copy previous procedure button appears in the NoteWriter procedure form to the right of the existing Copy previous note button.

## Document Cancer Disease Status Details

Oncologists can now document disease status values from the Problem List and directly in a progress note if using Diagnosis-Aware notes. After a disease status value is documented for a patient, oncologists can see it in Oncology Storyboards for quick reference. They can also click the disease status value in their Storyboard to update it.



Example of new Disease Status option on Problem List

**My Note**

Progress Notes • No service • 7/15/2024 02:00 PM ⓘ

✪ | **B** | abc | ↶ | ? | + | Insert SmartText | ↷ | ↵ | ↶ | ↷ | ↻ | 🗑️ | 🗒️

⬆️ | 🗨️ | **Diagnoses** ▾

◆ **Malignant neoplasm of central portion of left breast in female, estrogen receptor positive (CMS code)** ✎

Disease status: **Oncology Disease Status** ▾

Evidence: **Oncology Disease Status Evidence** ▾

Diagnosis-Aware note example. The Disease Status can also be documented in a Diagnosis-Aware. Selected options will then automatically update the Problem List.

For more information on Diagnosis-Aware/Problem-Oriented Notes, please see the [Problem-Oriented Charting in Notes](#) tip sheet.

## Document Multi-Component Immunizations in the MAR

Some immunizations, such as Pentacel and Menveo, are made up of a powder component and a liquid diluent component that a nurse must combine before administering them. Currently, nurses need to document the diluent component in a free-text comment on the MAR. With this upgrade, nurses are now able to document both components in discrete fields on the MAR.

**MAR** | Report | Select Medications | Halfway Dose | Pyxis Med Link | Doc Flowsheets

Schedule Date/Time: 4/7/2026 1500 | Documented By: UCSF, REGISTERED NURSE | Document for Another User

Medication

diphtheria-tetanus-pertussis(accel)-polio-haemophilus B (PENTACEL) 2-vial vaccine ⓘ Dose: 0.5 mL : Intramuscular : Once

Show Flowsheet

**Order Information**

Product Instructions:  
Keep Refrigerated Until Use.

Scan ONLY Haemophilus b Conjugate POWDER vial.

Reconstitute Haemophilus b Conjugate powder using liquid from DTaP-IPV vial. Withdraw 0.5 mL from reconstituted solution and administer dose.

Ordered Admin Dose: 1 Dose  
Frequency: Once  
Route: Intramuscular  
Ordered Dose: 0.5 mL  
Order Start Time: Today 04/07/26 at 1500  
Administrations Remaining: 0 (+1 in progress)  
Expected Dispense Volume: 0.5 mL

References: Lexi-Comp (Adult)  
Lexi-Comp (Neo/Ped)  
CDC VIS (English)  
CDC VIS (Non-English)

Next Actions  
04/07  
1500  
Due

**Administration Details**

Action	Date	Time	Comment
Given	04/07/2026	1441	

Route: Intramuscular | Site: Right Deltoid

Dose: 0.5 mL

**Immunization Info**

**DTaP/HiB/IPV**

Lot Number	NDC	Expiration Date
ABC123	49281-544-58	04/07/2027
XYZ789	49281-561-01	04/07/2027

Product: PENTACEL ACTH... | Manufacturer: Sanofi-Pasteur | VIS Publish Date: Multivaccine 07/2...

## New Storyboard Banner for Patient Contacts Requiring Interpreter Support

To help users quickly identify patients who may require language support, Storyboard now displays a “**May Need Interpreter**” banner for patients with contacts (e.g., parent or guardian) who may need interpretation services.

The screenshot shows a patient registration form for Simone Moreno. The patient's profile includes a 'May Need Interpreter' banner. The registration information is as follows:

- Simone Moreno** (Legal Name)  
Pronouns: she/her/hers
- 6 yo, 2/8/2019  
Gender identity: Female  
Legal sex: Female
- 531 Main St  
Cincinnati OH 45202-3223
- SSN: xxx-xx-1357  
MRN: 717312  
CSN: 10004945677

Contact Information:  
608-555-0112 (Home Phone) ★

Patient Contacts:

- Moreno, Nina**  
Mother, Emergency Contact  
608-555-0103 (Mobile)  
**Needs Interpreter: Russian**
- Moreno, Francisco**  
Father  
608-555-0138 (Mobile)  
Spanish  
[1 more contact](#)  
**Other contact needs interpreter**

# Clinical Review & Decision Support Tools

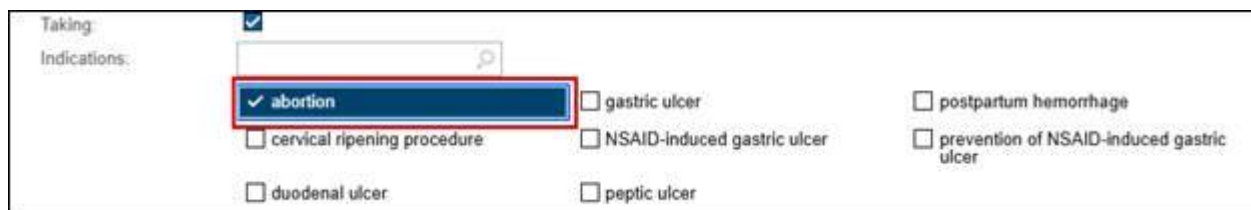
## Abortion-Related Medications and Patient Privacy

To support patient privacy and comply with state regulations, Epic may filter certain abortion-related medications, diagnoses, and procedures from Care Everywhere and other external records. While some medications are always excluded, others are only filtered when they are clearly linked to an abortion-related diagnosis or indication. Proper documentation is essential to ensure the correct information is shared—or withheld—when records are exchanged.

To ensure appropriate privacy protections, be sure to associate relevant medication orders with the correct diagnosis or indication.



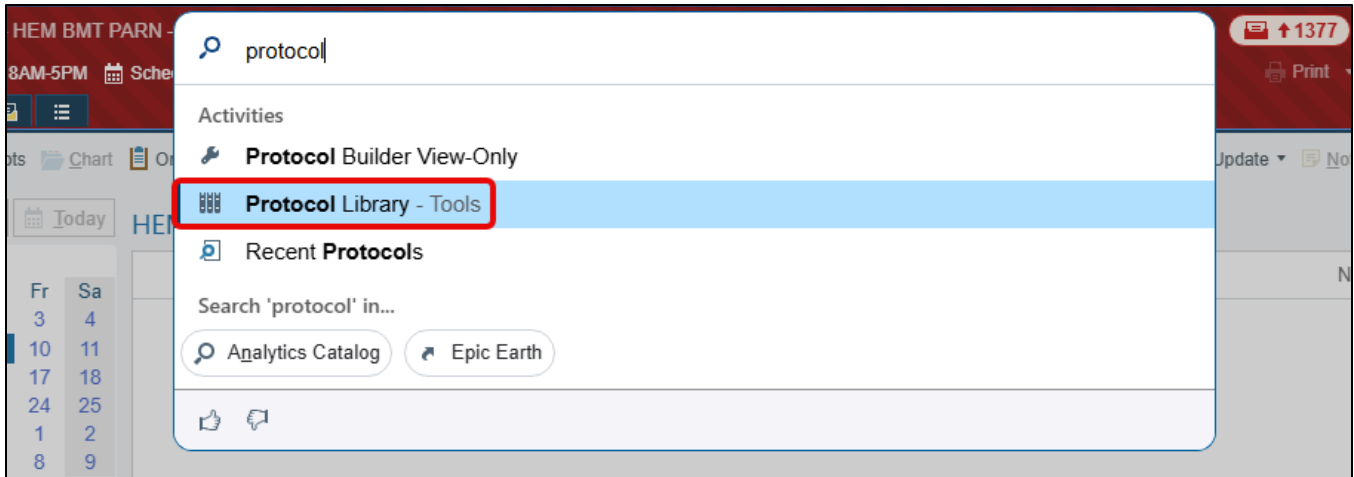
Associate order with a diagnosis



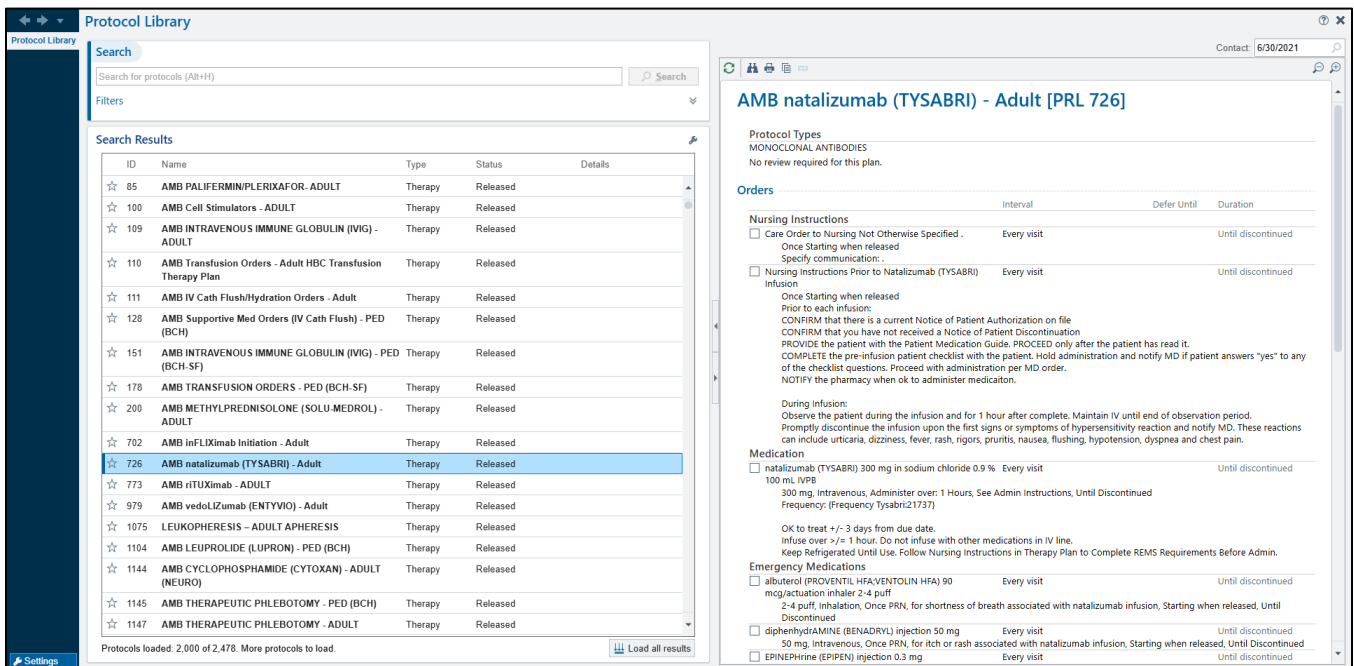
Add an indication of use in the Order Composer

## Review Treatment or Therapy Plans in the Protocol Library

Clinicians can now search and access the **Protocol Library**, a centralized place to review treatment or therapy plans, from inside or outside of a patient encounter. This self-service activity helps speed up and improve accessibility and discoverability of protocols.



Use the Assistant Bar to search for Protocol Library



New Protocol Library activity

## Open Encounters from SlicerDicer Visits Query

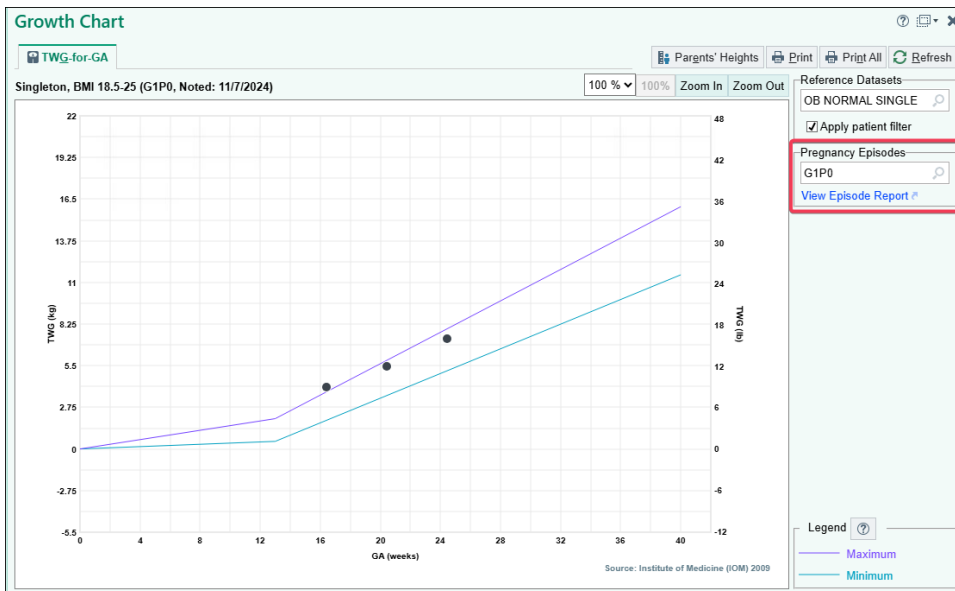
In SlicerDicer, when viewing the Visits data model, clinicians can now open a specific encounter by right-clicking on a row in the table and selecting Open Encounter.

The screenshot shows a table titled "Number of Visits" for the period "Last 6 months". The table has columns for Visit Date, Appointment Time, Patient Name, MRN, and Number of Visits. A summary row shows the date range "Oct 29, 2024 - Apr 28, 2025" and a total of "441,104" visits. A right-click context menu is open over the first row, with "Open Encounter" highlighted in red.

Visit Date	Appointment Time	Patient Name	MRN	Number of Visits
Oct 29, 2024 - Apr 28, 2025 441,104				
03/15/2025	11:15	Morse,Lora	5857393	
03/12/2025	09:30	Richardson,Kurtis	706711	
03/07/2025	09:15	Mccarthy,Lena	1798443	
04/04/2025	09:15	Silva,Anton	5864868	
01/30/2025	10:15	Rivers,Summer	9891950	
01/20/2025	14:45	Turner,Omar	2378346	
01/12/2025	16:30	Phelps,Guadalupe	3533408	
03/18/2025	09:15	Wolfe,Kelvin	3891580	
01/13/2025	14:30	Sweeney,Noreen	4901568	

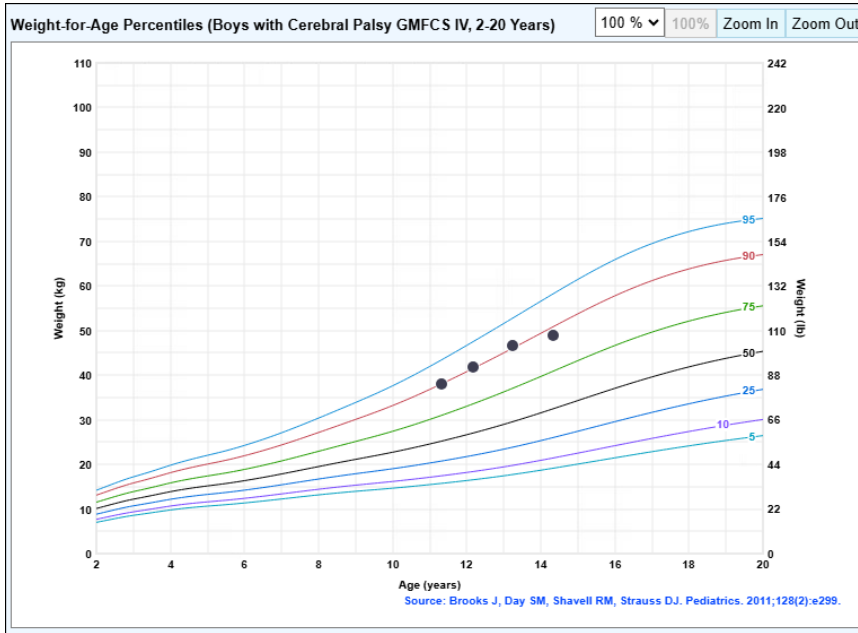
## Review Growth Data for Past Pregnancies

Data from both active and resolved pregnancy episodes are now available in the Growth Chart activity. Compare data about growth trends, gestational age, outcome, and outcome date from multiple pregnancy episodes using the pregnancy episodes lists.



# New Growth Charts for Patients with Cerebral Palsy

Clinicians can now use growth chart curves specifically for children with cerebral palsy (CP).



# Patient Engagement & MyChart Enhancements

## Improved Care Gap Attestation in MyChart

Currently, patients can complete some of their care gaps in the Preventative Care activity of MyChart. To reduce the need for clinical staff follow up, patients are now required to add both the date and name or address of the location where they received care when attesting their completed care gaps for Diabetic Foot and Eye Exam, Advanced Care Planning, and Flu. Additionally, patients can now also upload multiple documents to better report proof of external care.

### Diabetes: Foot Exam

Due: Yearly

Age  
45 years

DM Is  
Palliative  
Care Patient  
No

Registries  
Diabetes  
Registry,  
Primary Care  
Wellness  
Registrv

**TODAY**

#### Patient-reported completion needs review

Topic Status: Overdue since 12/19/2023

Next Action: Review the provided documentation to confirm the follow-up is appropriate

**Patient-reported completion in UCSF MyChart**

Reported Date	Submitted	Reported Location
12/29/2025	3/16/2026 8:52 AM	Anywhere USA

[Review Completion](#)

Document on 4/7/2026 3:25 PM:  
Foot Exam.pdf

DEC 19 2022

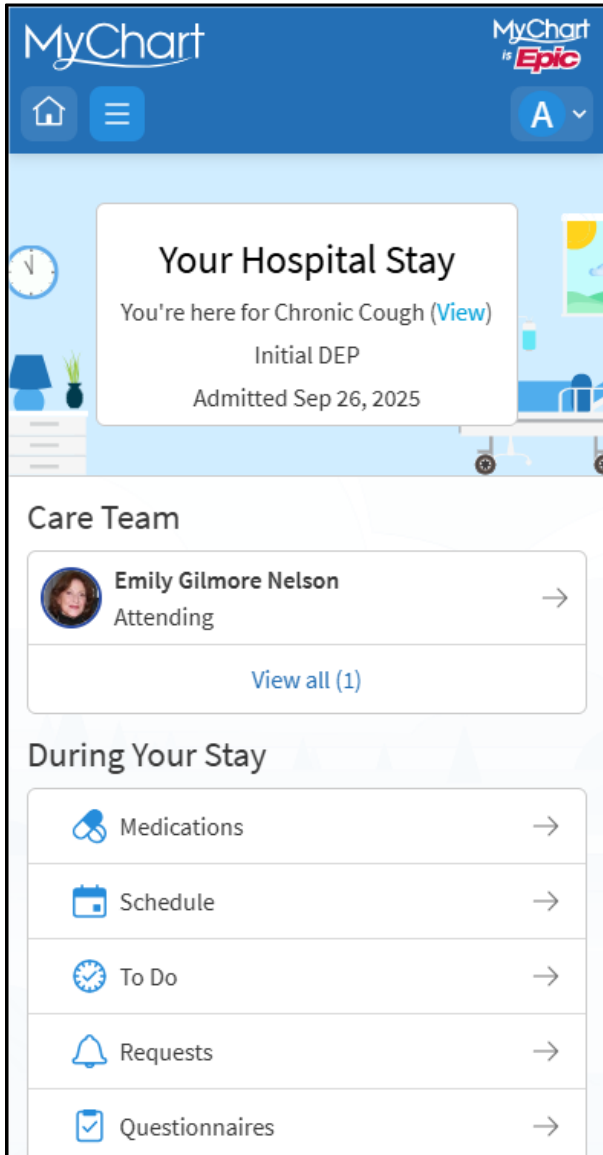
#### Diabetic Foot Exam - External

Component	Value
Diabetic Foot Exam - External	test

Example of patient-reported completion of Diabetic Foot Exam submitted by patient. Link to PDF that patient uploaded via MyChart to attest of Care Gap completion.

## MyChart Bedside Accessible without App

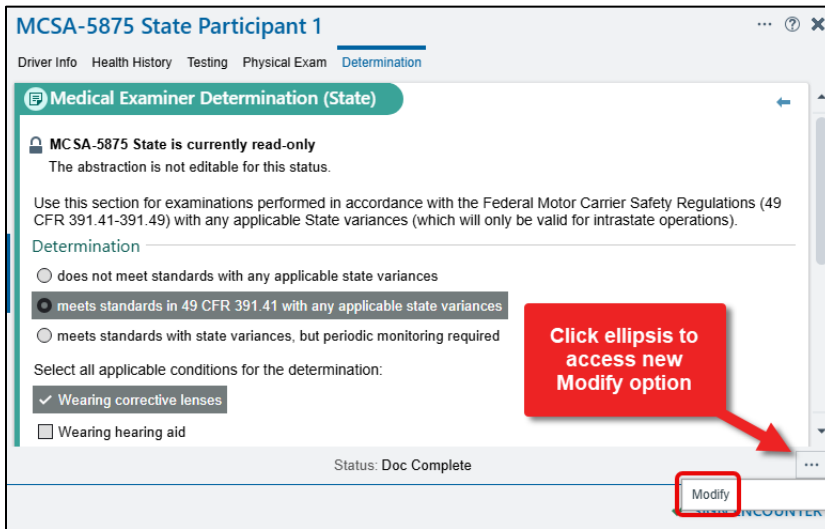
Patients can now view information about their hospital stay with MyChart Bedside directly in their web browser without having to download the MyChart app, making it easier for them to stay involved in their care. When patients log in, they are taken to the Your Hospital Stay page and have access to information about their stay, such as their care team members, test results, medications, and more.



# Specialty Workflows & Clinical Enhancements

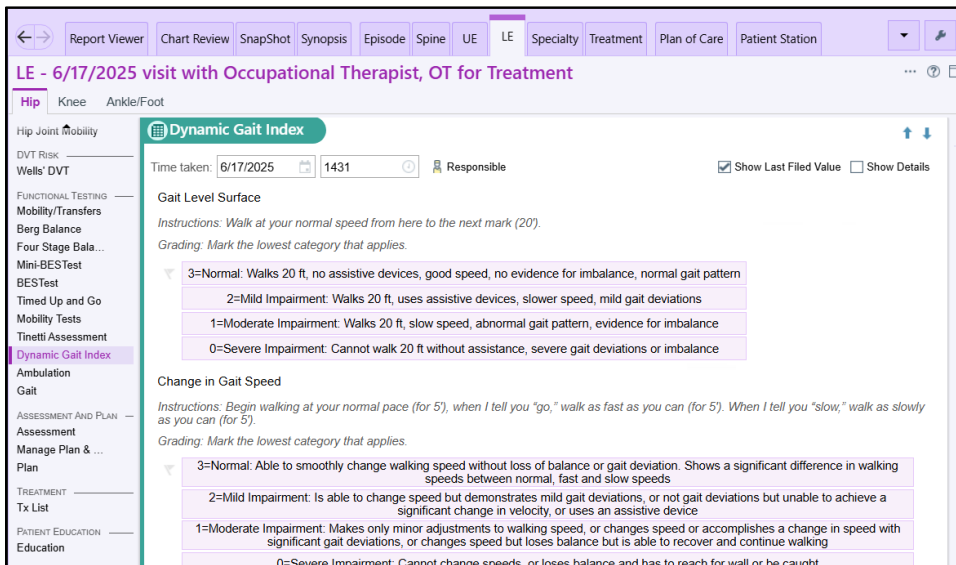
## Modify Completed DOT and Coast Guard Forms

Occupational Medicine clinicians who complete employment physicals for the Department of Transportation (DOT) using the State MCSA-5875, Federal MCSA-5875, MCSA-5876 Certificate, or CG-719K form can now modify a complete form from any section.



## Assess a Patient's Gait in Outpatient Evaluations

To make it easier for therapists to assess the likelihood of a patient falling, a new Dynamic Gait Index section has been added to numerous PT and OT outpatient evaluations.



## Specialty-Specific Storyboard Appears for Pregnant Pediatric Patients and Early-Pregnancy Patients

Currently, clinicians working with pregnant patients in pediatric departments would see the obstetric Storyboard by default. Now, clinicians will see the clinical storyboard for their specialty and context so they can view the most relevant information to the current appointment. All clinical storyboards will still contain the patient's pregnancy status by default.

**Judy A. Jetson**  
Legal: **Judith A. Jetson**  
Female, 17 y.o., 3/10/2009  
Pronouns: she/her  
MRN: 80073160  
**Language: English**  
Legal Guardian: Jetson, Jane  
None

**COVID Results/Vaccine Summary**

**View Patient Questionnaires**

Primary Cvg: Self Pay

Allergies: No Known Allergies

**THIS PREGNANCY**  
GA: 15w2d (9/7/2026)  
Hx: G1P0

**Guy, Michelle E, MD**  
PCP - General

**REASON FOR VISIT**  
for Nausea

BP: 110/68 (57%/ 66%)  
Pulse: 95  
Temp: 36.8 °C (98.2 °F)  
SpO2: 99%  
Height: 157.5 cm (5' 2") (20%)  
Weight: 49.9 kg (110 lb) (25%)  
BMI: 20.12 kg/m<sup>2</sup> (39%)

## New Rheumatology Storyboard

A new Rheumatology Storyboard is available, which speeds up clinician workflows by bringing rheumatology-specific information together in one convenient view.

**CS**

**Chad Stark**  
Legal: Arya Stark  
Female, 37 y.o., 1/28/1989  
Pronouns: she/her  
MRN: 80008376  
Language: English  
No ACP

BMI: —

LAST 10 VISITS

🏥 Cardiology (2), Fam Med (3), Gen Int Med (2), Ophth, Primary Care (2)

🧪 No results

**RHEUMATOLOGIC PROBLEMS (2)**

- ✓ Rheumatoid arthritis involving both ankles with positive rheumatoid factor (CMS code)  
SmartForms
- Osteopenia of multiple sites
- Other problems (4)

**RHEUMATOLOGY MEDS**

- alendronate sodium
- methotrexate sodium

**CARE GAPS**

- 📌 Td Immunization

## Training, Resources & Staying Updated

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- 💡 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).