

## Patient Access APeX August Update - **Effective 8/10/25**

### Patient Access Users

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

## RTE Update – Medicare Beneficiary Identifiers (MBIs) End Date

**Audience:** West Bay, East Bay, Marin, Community Affiliates. All users who access Registration, Scheduling, and RTE.

**Reason for Change:** Previously, users were unaware when a Medicare RTE response indicated an MBI End Date, leading to errors such as ‘Invalid/Missing Subscriber/Insured ID,’ without understanding that the issue stemmed from the MBI expiration.

### **Description & Workflow:**

Now, APeX will utilize RTE to capture MBI end dates before they expire.

APeX will automatically capture and alert users of an impending MBI End Date when indicated in the Medicare RTE response. The new RTE alerts regarding MBI End Dates will be in the Medicare eligibility responses and the Registration Sidebar Checklist.

### Alerts

#### Medicare Response Indicates MBI End Date

Medicare RTE response indicates the following MBI End Date without providing the new ID. Please navigate to the Noridian Medicare portal, use the MBI LookUp tool to obtain the new ID, and update the patient's record accordingly.  
20250621

### Reasons for MBI End Date:

<b>Beneficiary Received a New MBI</b>	Medicare issues a new MBI to the beneficiary to protect against identity theft if the old MBI was compromised or to make the old MBI invalid through routine updates.
<b>Beneficiary Deceased</b>	The MBI is end-dated upon the beneficiary's death.
<b>Termination of Medicare Coverage</b>	Coverage is terminated due to eligibility changes.
<b>Administrative Changes</b>	Administrative updates necessitate a new MBI.
<b>Incarceration or Deportation</b>	The MBI is end-dated during periods of inactivity due to incarceration or deportation.

This notification will help prevent errors related to “Invalid/Missing Subscriber/Insured ID” by notifying users of the need to update the MBI information. MBI information should be current and accurate to avoid potential issues. The MBI Lookup tool is available for verification on the Noridian Medicare portal. <https://www.noridianmedicareportal.com/>

**NORIDIAN** Healthcare Solutions  
Noridian Medicare Portal  
Last Login on 7/29/2025 10:57 AM CDT | Failed attempts: 0  
Home User Manual Contact Us Help

Eligibility or MBI Lookup Claim Status Appeals Remittance Advices Financials Same or Similar DME Prior Authorizations Provider Audit Provider Enrollment

**Availability**  
System Normal  
All Functions Available  
Hours of Availability

**Notifications & Updates** See All >  
IMPORTANT: Mandatory SNF Off-Cycle Revalidation deadline extended to January 1, 2026  
03/28/2025 | 10:23 AM  
Appeals Updates in NMP  
04/04/2025 | 12:51 PM  
COBA Crossover Letters Available on NMP  
02/05/2025 | 11:46 AM

**Eligibility**  
View Medicare beneficiary details including deductible, Part D Enrollment, HMO, MSP, Inpatient Summary and Preventive Services.  
Start Inquiry

**Claim Status**  
View claim status, submit Self Service Reopening/Recoupment Requests, view/respond to ADRs, inquire on CERT claims, submit EDI Claims and perform purged claim requests.  
Start Inquiry

**MBI LookUp**  
Retrieve a patient's Medicare Beneficiary Identifier (MBI).  
Start Inquiry

Name of Build Analyst: Nick Lowy

# FYI Flag Update

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

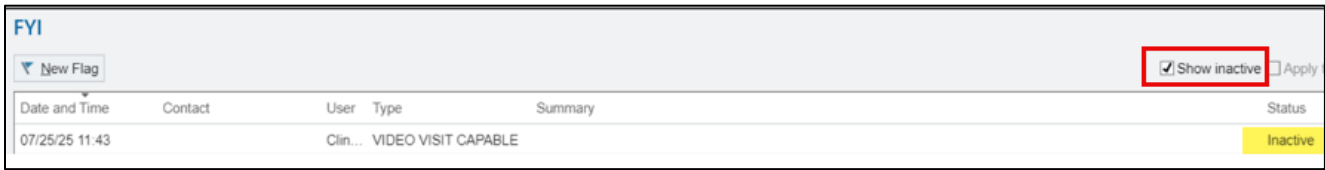
**Reason for Change:** Some FYI Flags on patient records are no longer linked to an active workflow or purpose. These outdated flags create unnecessary clutter in the patient’s chart and can negatively affect the end user experience.

**Description & Workflow:**

We are deactivating the following **FYI Flags** from *patient records* and the *FYI Flag Type* category list. These flags will no longer be available to add to patient records:

- Visitor Restriction
- Video Visit Capable
- GI Titus Patient
- Ketogenic Diet Patient: No Dextrose, No Liquid Medications, No Suspensions

End users can view inactive FYI Flags by selecting the “**Inactive**” checkbox in the FYI Flag activity. By default, inactive FYI Flags do not appear on the Storyboard or in the FYI activity.



For Visitor Restriction, please follow the dedicated workflow in Salesforce instead of using an FYI Flag.

Security Team: [Restricted Visitor Entry](#)

ED RN: [BCH MB ED Patients Visitor List for Admitted Patients](#)

Admit Staff/HUSC: [Patient Visitor List Update](#)

*Name of Informaticists: Dr Aris Oates; Dr Katie Grouse; Amy Kangwankij, CNI, Name of Analyst: Anne Kroeger*

# Capture the Preferred Pharmacy for Pediatric Admissions

**Audience:** West Bay, East Bay Pediatrics

**Reason for Change:** Pediatrics has asked to populate the preferred pharmacy field with the patient's preferred pharmacy for minor patients.

**Description & Workflow:** In the *Admission Details* section, enter the **pharmacy name** and **city** to narrow down results from the national database.

**Admission Details**

Expected Date/Time: 12/26/2025 Expected LOS: Exp Discharge Date:   
 Point of Origin: Physician Referral: Source Location: Source Location Address:   
 Referring Provider: Alt Referring Provider: Admission Type: Routine/Elective   
 Private Encounter: No Accident Related? No Yes   
 Admission Info / Screening: Transfer From: Hosp Last 30 Days? Loc Prior to Admit: Minimal Blood Use?   
 Notification Preferences: Notify PCP? Yes PCP Notified: Notify Referring? Manual PCP Notify?   
 Patient Estimate: Pt Estimate Needed?   
 Additional Info: Preferred Pharmacy:   
 Close Cancel

Confirm the address so you can select the correct pharmacy.

% ID	E-Rx?	E-CtrId?	Operati...	Pharmacy	Address	City	State	Zip	Phone	Fax
7...	Yes	Yes	Retail	CVS 17623 IN TARGET - SAN FRANCISCO, CA - 7...	789 MISSIO...	SAN FR...	CA	94103	415-...	415-...
7...	Yes	Yes	Retail	CVS 17625 IN TARGET - SAN FRANCISCO, CA - 2...	2675 GEAR...	SAN FR...	CA	94118	415-...	415-...
8...	Yes	Yes	Retail	CVS 17672 IN TARGET - SAN FRANCISCO, CA - 2...	225 BUSH ...	SAN FR...	CA	94104	415-...	415-...
8...	Yes	Yes	Retail	CVS 17674 IN TARGET - SAN FRANCISCO, CA - 1...	1830 OCEA...	SAN FR...	CA	94112	415-...	415-...
9...	Yes	Yes	Retail	CVS 17709 IN TARGET - SAN FRANCISCO, CA - 2...	233 Winsto...	San Fra...	CA	94132	415-...	415-...
1...	Yes	Yes	Retail	CVS 17757 IN TARGET - SAN FRANCISCO, CA - 1...	1690 Folso...	San Fra...	CA	94103	415-...	628-...
7...	Yes	Yes	Retail	CVS/PHARMACY #10035 - SAN FRANCISCO, CA, ...	581 Market St	San Fra...	CA	94105	415-...	415-...
7...	Yes	Yes	Retail	CVS/PHARMACY #10080 - SAN FRANCISCO, CA, ...	1059 Hyde St	San Fra...	CA	94109	415-...	415-...
8...	Yes	Yes	Retail	CVS/PHARMACY #10164 - SAN FRANCISCO, CA, ...	601 Mission...	San Fra...	CA	94105	415-...	415-...
7...	Yes	Yes	Retail	CVS/PHARMACY #10188 - SAN FRANCISCO, CA, ...	499 Haight St	San Fra...	CA	94117	415-...	415-...
8...	Yes	Yes	Retail	CVS/PHARMACY #10330 - SAN FRANCISCO, CA, ...	3600 Geary ...	San Fra...	CA	94118	415-...	415-...
9...	Yes	Yes	Retail	CVS/PHARMACY #10368 - SAN FRANCISCO, CA, ...	400 Sutter St	San Fra...	CA	94112	415-...	415-...
9...	Yes	Yes	Retail	CVS/PHARMACY #10492 - SAN FRANCISCO, CA, ...	500 Pine St	San Fra...	CA	94108	415-...	415-...
1...	Yes	No	Retail	CVS/PHARMACY #10495 LONG TERM CLOSURE...	399 Geary St	San Fra...	CA	94102	415-...	628-...
9...	Yes	No	Retail	CVS/PHARMACY #11004 CLOSED COVID - SAN ...	799 Beach St	San Fra...	CA	941...	415-...	415-...
9...	Yes	Yes	Retail	CVS/PHARMACY #11107 - SAN FRANCISCO, CA, ...	701 Van Ne...	San Fra...	CA	941...	415-...	628-...
7...	Yes	Yes	Retail	CVS/PHARMACY #1983 - SAN FRANCISCO, CA - ...	701 Portola Dr	San Fra...	CA	94127	415-...	415-...
5...	Yes	Yes	Retail	CVS/PHARMACY #2852 - SAN FRANCISCO, CA - ...	731 MARKE...	SAN FR...	CA	94103	415-...	415-...
6...	Yes	Yes	Retail	CVS/PHARMACY #4675 - SAN FRANCISCO, CA - ...	377 32ND A...	SAN FR...	CA	94121	415-...	415-...
9...	Yes	Yes	Retail	CVS/PHARMACY #5131 - SAN FRANCISCO, CA - ...	1900 19th Ave	San Fra...	CA	941...	415-...	415-...
6...	Yes	Yes	Retail	CVS/PHARMACY #7857 - SAN FRANCISCO, CA - ...	351 Californ...	San Fra...	CA	94104	415-...	415-...
5...	Yes	Yes	Retail	CVS/PHARMACY #7955 - SAN FRANCISCO, CA - ...	2025 Van N...	San Fra...	CA	94109	415-...	415-...
3...	Yes	Yes	Retail	CAREPLUS (CVS SPECIALTY) #2708 - SAN FRA...	445 CASTR...	SAN FR...	CA	94114	800-...	415-...

Name of Build Analyst: Billy Harris

## MRI Scheduling Update

**Audience:** UCSF MRI Schedulers

**Reason for Change:** To improve the accuracy and safety of MRI scheduling.

**Description and Workflow:** A new decision tree is now part of the MRI scheduling process. It uses clearer, more patient-friendly questions to help direct patients to the correct MRI resource.

If the patient indicates they have an implant or another possible safety risk, the system will stop the scheduling and send the request to a work queue for an MRI Technologist to review the patient’s medical history.

Schedulers will see a message when this happens and should let the patient know that Radiology Scheduling will follow up with them to schedule the appointment.

Decision Tree for MR ABDOMEN WITHOUT CONTRAST - Radiant, Mammo

Do you have anything on or in your body that you were not born with?

Yes

No

Yes

Do you have any of the following? Please stop me as I am going through the list if any of these apply to you.

☐ An IUD that was placed in China

☐ Approved by Vetting Team

☐ Braces, palate expander

☐ Breast Expander

☐ Bullet, shrapnel, metal shavings

☐ Clip, aneurysm clip

☐ Cochlear, otologic, or other ear implant

☐ Coil

☐ Electronic or Active implant/device - an implant requiring external power or battery to operate

☐ Eye lid spring or wire

☐ Gastric Band

☐ Glucose Monitor

☐ IVC Filter

☐ Infusion Pump and/or drug delivery system

☐ Insulin Pump

☐ Loop Recorder

☐ Medical device that is worn or adhered to the skin

☐ Medication Patch

☐ Other

☒ Pacemaker, Defibrillator, or ICD (Implanted Cardioverter Defibrillator)

☐ Penile Implant

☐ Prostacyclin Infusion

☐ Prosthesis of any kind, prosthetic limb

☐ Shunt

☐ Stent in any part of your body except the heart?

☐ Stimulator of any kind (Neuro, Vagal, Deep Brain, or Spinal)

Pacemaker, Defibrillator, or ICD (I...

Enter a comment

Enter a comment

Results - Deny Scheduling

Denial Instructions

To make sure that we can proceed with your MRI safely, I am going to have one of our technologists review your implant before we schedule your MRI. If you have the device card for your implant please send a MyChart message to your ordering provider with a picture of it. This will help us get the information we need to get you scheduled as fast as possible. If you do not have MyChart please fax it to us at 415-353-7299. Our team will follow up with you to obtain any information we need. This may take some time. Please make sure to pick up the phone when they call.

Show Path

Pause

Deny

Discard Tree

Informaticist: Marc Kohli, Hailey Choi, SME: Rodolfo Baltadano, Craig De Vincent, Build Analyst: Abby Brown

## New Phonetic Name Field

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

**Reason for change:** To help all staff pronounce patients’ names correctly and respectfully.

**Description & Workflow:** A new Phonetic Name field has been added to the Demographics section of Registration. This field is visible to all users and can be updated by clinical and non-clinical staff.

Staff should enter the phonetic spelling of the patient’s name using the provided spelling key as a guide. The phonetic name will appear in the patient information hover bubble on Storyboard when documented.

Please see the [Adding a Phonetic \(sound-based\) Spelling tip sheet](#) for the spelling key and additional information.



Examples of names spelled phonetically:

<b>Imani</b>	ih-MAW-nee	<b>Zhan</b>	zhahn
<b>Nguyen</b>	whin	<b>Haroon</b>	hah-ROON
<b>Elijah</b>	ih-LYE-zhuh	<b>Quincy</b>	KWHIN-see
<b>Omar</b>	OH-mar	<b>Samira</b>	suh-MEER-uh
<b>Nikita</b>	nih-KEE-tuh	<b>Malakai</b>	MAL-uh-kye
<b>Mohamed</b>	moh-HAH-mud	<b>Marcelo</b>	mar-SEHL-loh
<b>Alejandro</b>	ah-lay-HAHN-droh	<b>Aries</b>	AIR-eez
<b>Genevieve</b>	JEHN-ih-veev		

## Spelling Key:

- Syllables are separated by dashes
- Stressed syllables are capitalized

Respelling symbol(s)	Example
b	<i>but, web</i>
ch	<i>church, nature</i>
d	<i>do, odd</i>
dh	<i>this, breathe, father</i>
f	<i>fool, enough, leaf</i>
g	<i>go, beg</i>
h	<i>ham, ahead</i>
j	<i>gin, joy, edge</i>
k	<i>cat, kiss, queen, skin, thick</i>
kh	<i>loch</i>
l	<i>left, bell</i>
m	<i>man, ham</i>
n	<i>no, tin</i>
ng	<i>ring, singer, sink</i>
ng-g	<i>finger</i>
p	<i>pen, spin, tip</i>
py	<i>pupil</i>
r	<i>run, very</i>
s or ss	<i>see, city, pass</i>
sh	<i>she, sure, emotion, leash</i>
t	<i>two, sting, bet</i>
th	<i>thing, teeth</i>
v	<i>voice, have</i>
w	<i>we</i>
wh	<i>what</i>
y	<i>yes</i>
z	<i>zoo, rose</i>
zh	<i>pleasure, vision, beige</i>

Respelling symbol(s)	Example
a	<i>trap, cat</i>
ah or aa	<i>palm, pot</i>
air	<i>square</i>
ar	<i>start</i>
arr	<i>marry</i>
aw	<i>thought, saw</i>
ay, ai	<i>face, ape</i>
er	<i>letter, Peter</i>
e, eh	<i>dress, met</i>
ee	<i>fleece, tree</i>
eer	<i>near</i>
err	<i>merry</i>
ew	<i>ewe, dew</i>
eye	<i>item</i>
i or ih (Use ih at end of syllable, esp. if l yields a real word, e.g. "hi", "ski")	<i>kit, bit</i>
irr	<i>mirror</i>
o	<i>lot</i>
oh or oe	<i>goat, toe, go</i>
oo	<i>food, boat, shoe</i>
oor	<i>cure or Europe</i>
ohr	<i>force or wore</i>
or or awr	<i>north or war</i>
orr	<i>orange</i>
ou	<i>out</i>
ow	<i>mouth</i>
oy	<i>choice, toy</i>
u	<i>strut</i>
uu	<i>foot, put</i>
uh	<i>mother, comma</i>
ur	<i>nurse</i>
urr	<i>hurry</i>
ye	<i>price</i>

Respelling symbol(s)	Example
UR	<i>further</i>
AIR	<i>hair, bare</i>
EER	<i>beer, hear</i>
OOR	<i>poor</i>
OR	<i>door, for</i>
AR	<i>car</i>
IKE	<i>bike</i>
INE	<i>line</i>
ITE	<i>light, bite</i>
ICE	<i>dice</i>
AL	<i>pal</i>
ALL	<i>ball</i>
AIL	<i>pail</i>
ULL	<i>hull</i>
OOL	<i>tool</i>
OAL	<i>coal</i>
EEL or EAL	<i>deal</i>
ILL	<i>pill</i>
ILE	<i>style, pile</i>

Source: <https://www.cmu.edu/hub/registrar/docs/phonetic-spelling-instructions.pdf>

Name of Build Analyst: Bates Burnell

## New PCMC Dashboard

**Audience impacted:** West Bay, East Bay

**Brief description & workflow:** A new **PCMC Dashboard** has been created to display the existing Occupancy Breakdown components, now grouped by Hospital Location. You can access the dashboard through your PCMC dashboard redirectors.



System Occupancy Breakdown														
Parnassus														
96% Total Occ%														
Total Capacity	87	68	-1	69	9	0	59%	101%	4	0	0	3	1	0
Staffed Beds	277	257	1	237	35	11	98%	98%	37	5	0	4	53	0
Open Beds	148	133	3	126	17	2	96%	95%	14	5	1	2	32	0
Occupied Beds	—	—	—	—	—	—	—	—	2	2	—	—	—	—
Unavail Beds	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Overall	512	458	3	432	61	13	96%	98%	57	12	1	9	86	0
BCH Oakland														
81% Total Occ%														
Total Capacity	85	78	1	76	5	0	95%	97%	8	0	1	0	12	0
Staffed Beds	277	257	1	237	35	11	98%	98%	37	5	0	4	53	0
Open Beds	67	46	2	43	0	0	64%	93%	1	1	1	3	0	0
Occupied Beds	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Unavail Beds	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Overall	152	124	3	119	5	0	81%	95%	11	2	2	3	12	0
Mount Zion														
54% Total Occ%														
Total Capacity	7	2	0	2	0	0	28%	100%	0	0	0	0	0	0
Staffed Beds	50	35	6	29	0	0	56%	82%	1	0	0	0	14	0
Open Beds	57	37	6	31	0	0	54%	83%	1	0	0	0	14	0
Occupied Beds	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Unavail Beds	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Overall	57	37	6	31	0	0	54%	83%	1	0	0	0	14	0
Birth Center														
54% Total Occ%														
Total Capacity	45	45	15	30	0	0	66%	98%	0	0	0	0	9	0
Staffed Beds	3	3	3	0	0	0	0%	0%	0	0	0	0	0	0
Open Beds	9	9	8	1	0	0	11%	11%	0	0	0	0	0	0
Occupied Beds	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Unavail Beds	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Overall	57	57	26	31	0	0	54%	54%	2	1	0	0	9	0
Adult IP Mission Bay														
87% Total Occ%														
Total Capacity	8	2	-1	3	0	0	37%	150%	1	0	0	0	0	-2
Staffed Beds	56	56	3	53	0	0	94%	94%	5	0	0	0	26	1
Open Beds	64	58	2	56	0	0	87%	95%	6	0	0	0	26	1
Occupied Beds	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Unavail Beds	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Overall	64	58	2	56	0	0	87%	95%	6	0	0	0	26	1
BCH Mission Bay														
92% Total Occ%														
Total Capacity	65	65	3	62	0	0	95%	95%	4	0	0	0	13	0
Staffed Beds	28	28	4	23	1	1	85%	85%	0	0	0	0	7	0
Open Beds	96	96	7	89	0	0	92%	92%	0	0	0	0	2	0
Occupied Beds	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Unavail Beds	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Overall	189	189	14	174	1	1	92%	92%	5	1	0	0	22	0

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

## Expired Patient Status on Track Board/Manager

**Audience:** All ED sites

**Reason for Change:** To enhance tracking of expired patients in ED.

**Brief description & workflow:** When provider documents a disposition of Expired, the patient status automatically turns to Expired with a black color column on Track Board and black color background on ED Manager.

**Expired status and black color column on Track Board:**

All Pts (15)	All Pts (15)	My Pts	My Pts	JADE (0)	Waiting Room (9)	Admits (1)
CDU (0)	Big Screen (13)	Portrait (15)	All Patients (15)	Admits (1)	All Patients (1)	
Fast Track (0)	Ready for Reg (1)	MRI (0)	CT (0)	Consults (0)	More Views	
COVID	Isa	Bed	Dispo	Patient		Com
—	—	01	—	Anonymous, Carbon J (124 y.o. U)	—	—
—	—	—	—	Anonymous, Dubnium J (124 y.o. U)	—	—

**Expired patient on ED Manager:**



Blue (1 of 22 occupied)										
	Bêd	Dis	Patient	CC	A	Time	RN	RES	ATT	RE
01	Anonymous, ...				1	20:52				X
01H	—	—		—	—	—	—	—	—	—
15	—	—		—	—	—	—	—	—	—
16	—	—		—	—	—	—	—	—	—

SME/Informaticist: Jason, Gerke, Analyst: Brandon Wade

## 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 pm -1:00 pm

### [APeX Reporting Office Hours Meeting Link](#)

Date	Time
<b>August 7, 2025</b>	12:10 pm - 1:00 pm
<b>August 21, 2025</b>	12:10 pm - 1:00 pm
<b>September 4, 2025</b>	12:10 pm - 1:00 pm
<b>September 18, 2025</b>	12:10 pm - 1:00 pm

## Patient Access Office Hours

Date	Time
<b>August 12, 2025</b>	9:00 am - 10:00 am
<b>September 9, 2025</b>	9:00 am - 10:00 am
<b>October 14, 2025</b>	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).