UCSF Health
APeX Training

CLIN DOC APeX Fall Upgrade 2025

Inpatient RNs and Ancillaries – West Bay, East Bay, Marin

UCSF Health will upgrade to APeX (Epic) May 2025 version on October 4th, 2025

In this edition:

Contributors: Clinical Systems
Nursing Informaticists
Revised: 9/15/2025: by Thornhill, Erik

APeX Training Zoom Support for Fall 2025 Upgrade

Date: **Saturday, October 4th to Friday, October 10th**

Time: **7:30 AM to 5:30 PM**

APeX Training support will be available from **Saturday, October 4th to Friday, October 10th from 7:30 AM to 5:30 PM**. For assistance, please click on the **APeX Training Support** button located on the Epic toolbar to launch the Zoom training support bridge.

Thank you and we look forward to assisting you!

Care Before Clicks

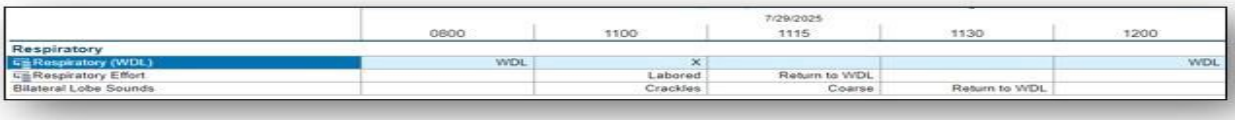
Care Before Clicks – Documenting Assessments by Exception

Audience: Nurses (IP, ED, Peds, L&D, PeriOp)

Reason for change: Over the years, nurses have shared that flowsheets and narrators have become **more cluttered, inconsistent, and repetitive**—slowing them down, making key information hard to find, and taking time away from patient care.

Brief Description & Workflow: We're going back to basics for assessments with documentation by exception. That means: if it's WDL (Within Defined Limits), you don't need to chart the normal all the time. Just focus on the abnormal stuff for the most part. Flowsheets are less cluttered, so you can **spend less time clicking and more time with your patients.** Documentation will follow a streamlined approach that prioritizes charting by exception. WDL (Within Defined Limits) statements are standardized across care areas to ensure consistency, while aligned flowsheet rows provide a shared view of patient information, improving reporting and reducing redundancy.

Initial assessments require comprehensive documentation, but ongoing assessments focus only on abnormalities or changes from WDL. Visual clutter is minimized by completing rows once resolved and reactivating them when needed. This approach improves clarity, efficiency, and teamwork across specialties while reducing the time spent documenting normals.



For more information, go to https://tiny.ucsf.edu/carebeforeclicksassessments or scan this QR code while on site/ VPN.

http://tiny.ucsf.edu/carebeforeclicksassessments

Analysts: Mary Barfield, Gena Schmidt, Cami Rutledge, Maggie Polak, Ryan Mendonca, Vandana Prakash, Brenda Burt

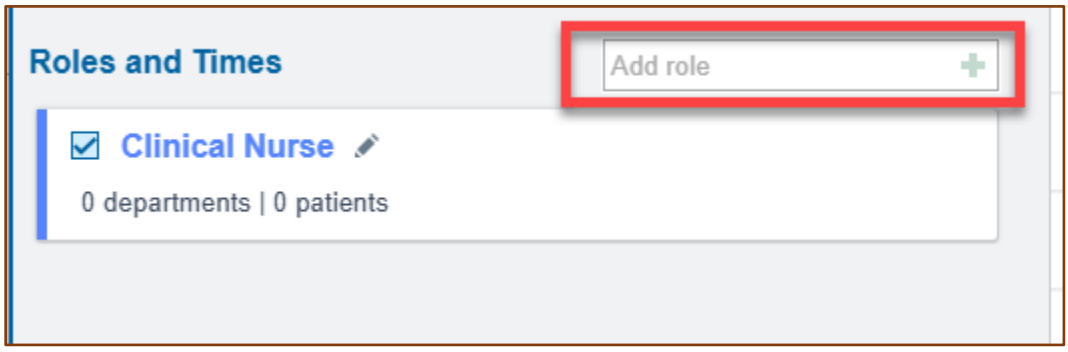
Informaticists: Amy Kangwankij & Jennifer Corbell

Treatment Teams

Sign In to Multiple Roles at Once

If you're working more than one role for a shift, like as the nurse for a few patients and as the charge nurse for the department, you can sign in to both roles at the same time when you start your shift, so you don't need to do it more than once or add yourself to patients' treatment teams manually

To add another role, search in the Add role field

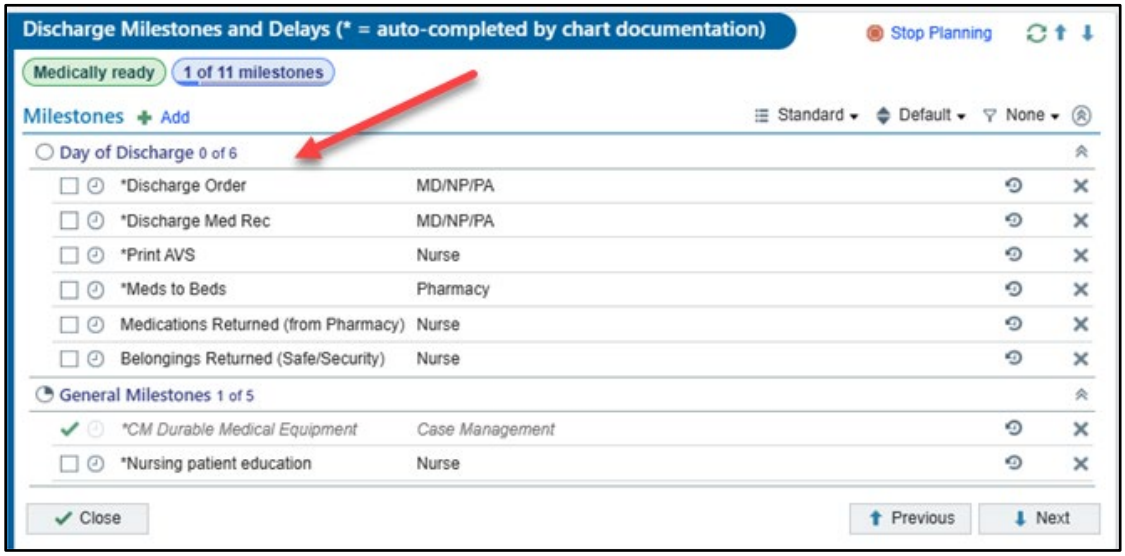


If a charge nurse is also providing care they will see the entire department in the Brain. Also the charge nurse, or any other additional relationship, expires at the shift end time. The next day the charge nurse will be available but not pre-checked.

Admission, Transfer, and Discharge

Related Discharge Milestones are Grouped

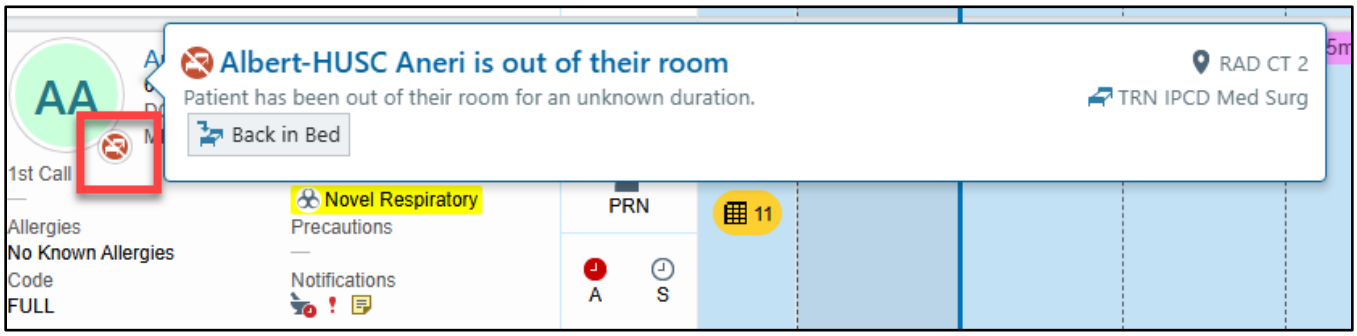
See which discharge tasks are related and track their overall progress with milestone groups. A **Day of Discharge** group has been created.



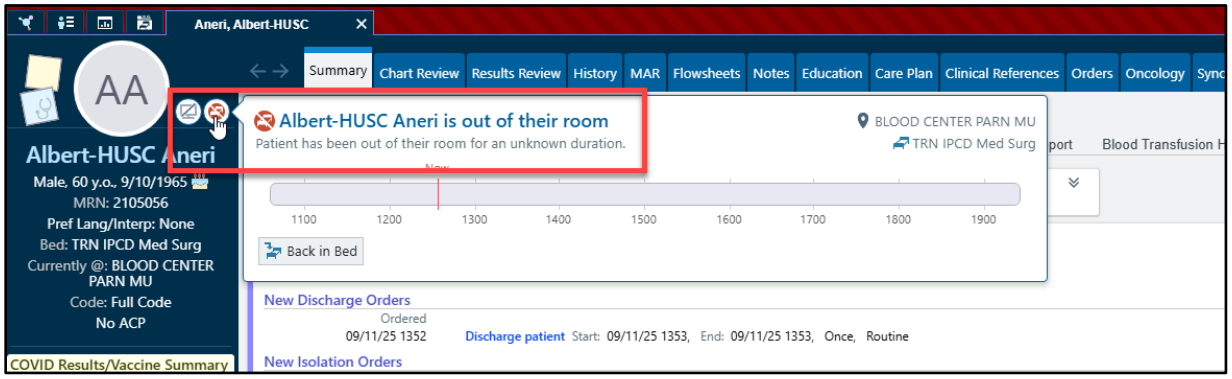
Patient Availability

Check a Patient's Current Availability

To help plan your work, you can see whether a patient is available using an icon in the Brain. Hover over the icon for details about the patient's current location and upcoming schedule.



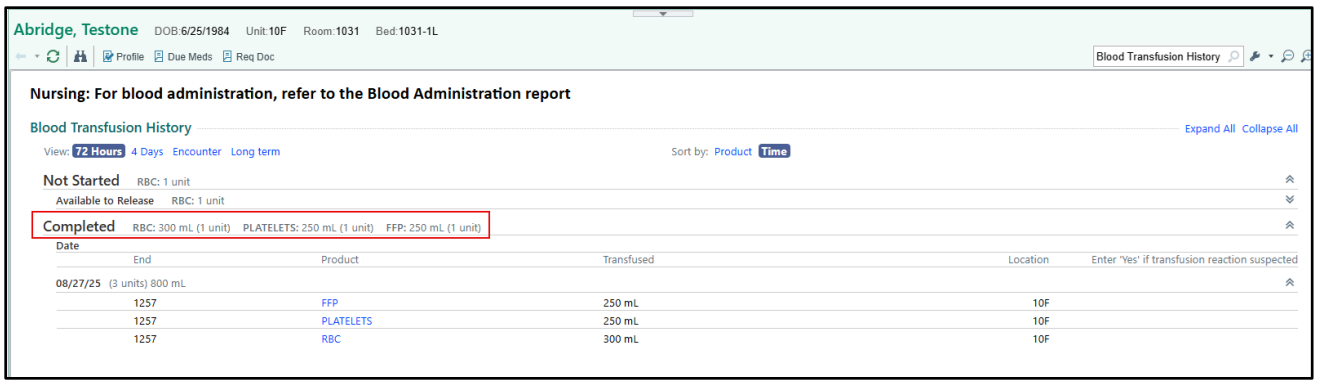
This can also be viewed from the storyboard



Blood Administration

Find Total Transfused Volumes Faster

When you're looking at a patient's blood transfusion history, you can now see the total volumes a patient has received of each product at a glance from the header rows, in addition to the units.



When volume documentation is missing, hover over the question mark (?) for more information. If you see approximated units (~), some of the units are from a massive transfusion protocol (MTP) that has only volume documented.

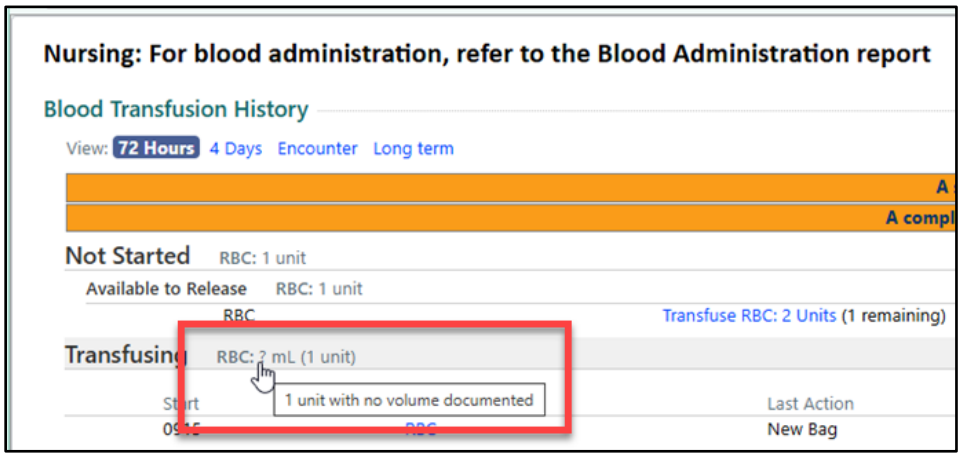
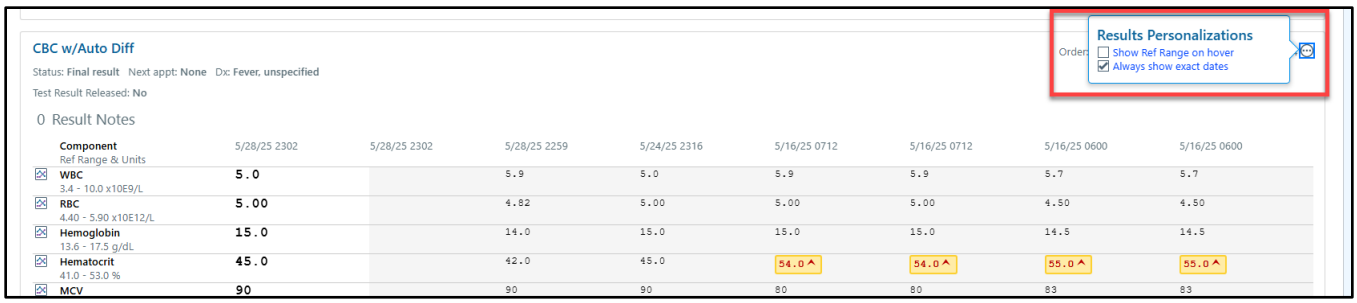


Chart Review and Snapshot

Always Show Exact Dates for Results

If you prefer the clarity of exact dates for test results, you can choose to show them alongside relative dates for results in Chart Review.

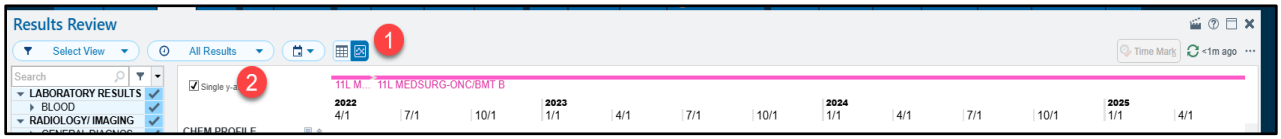
Hover over the 3 dots on the right side. Select **Always show exact dates**

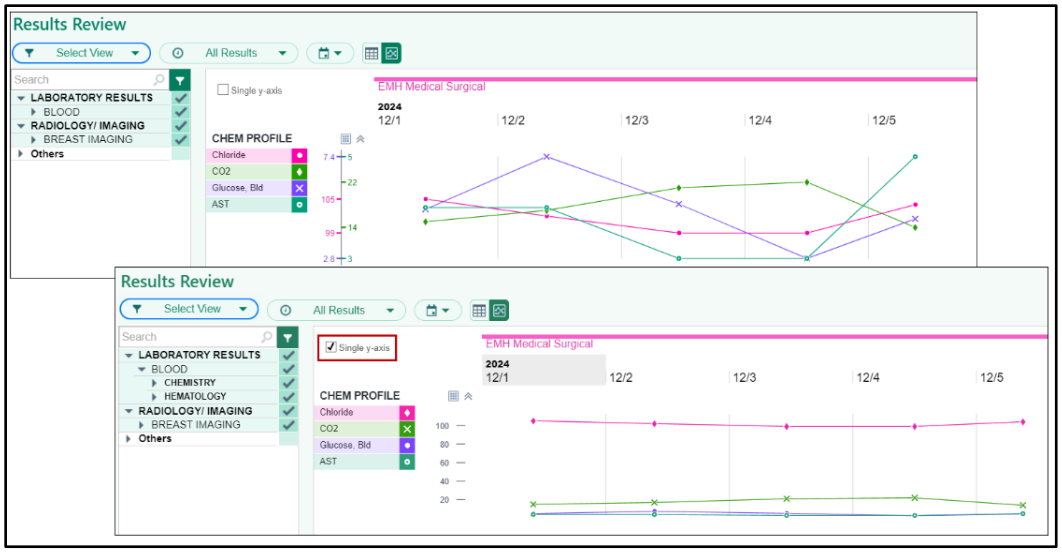


Graph Results Review Data on a Single Y-axis

To help make graphs easier to interpret when comparing rows of data with a similar range, like results for the same lab taken at different locations, you can now view each trend line on a consistent y-axis. If you use the Synopsis activity, you'll see the same change there.

1. Select the graph button
2. Select **Single y-axis**



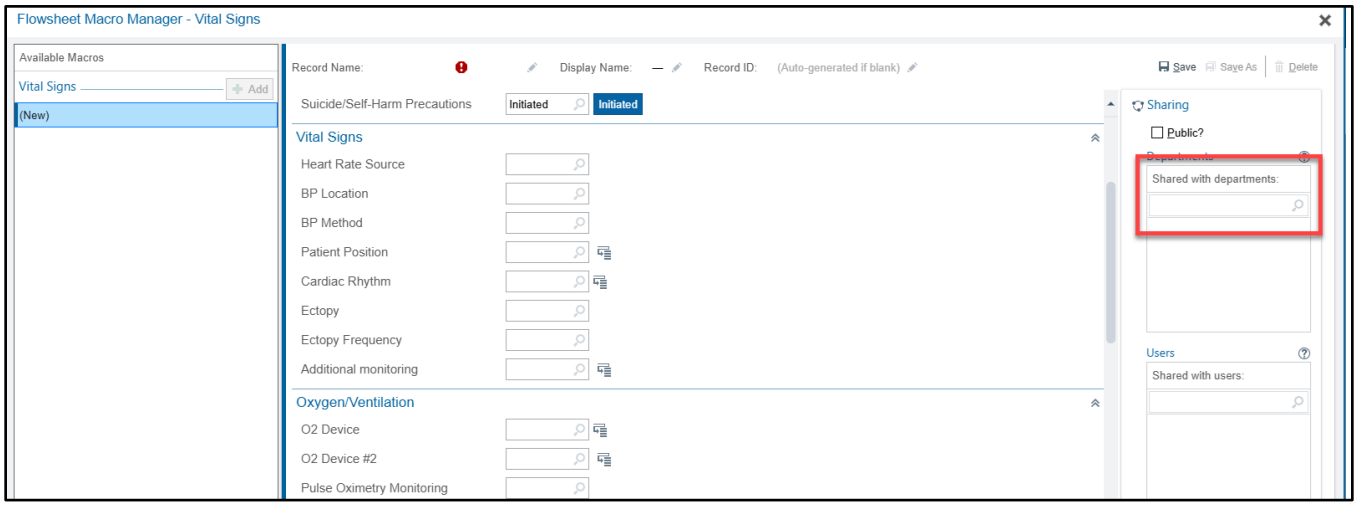


Documentation Flowsheets

Share Your Flowsheet Macros with Your Department

When you build a macro that could speed up assessments for all your peers, share it with your entire department all at once instead of listing individual users.

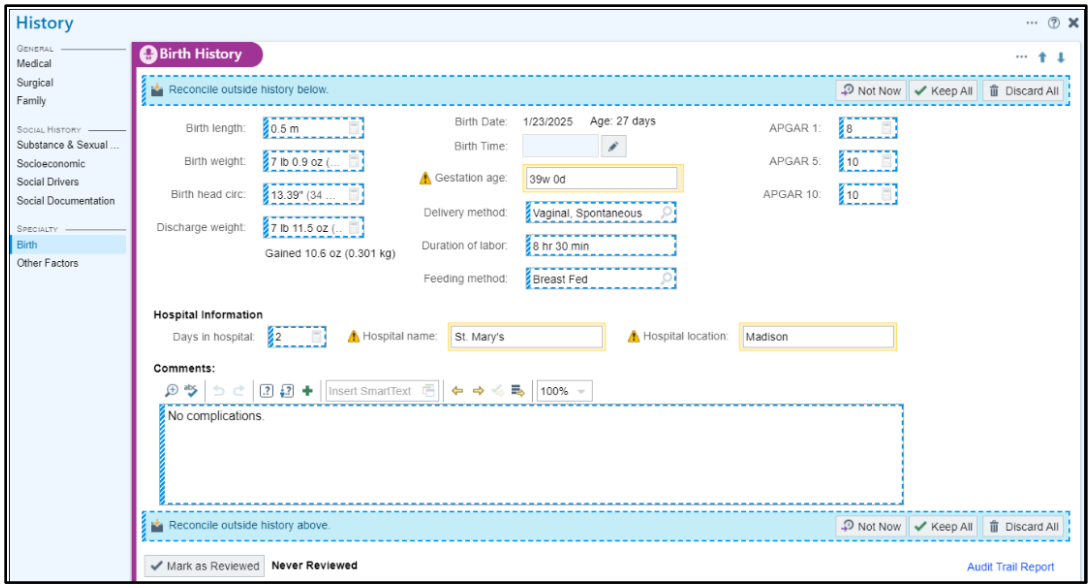
From the Flowsheet Macro Manager enter the department name in **Shared with departments**



History

Reconcile Birth History from Other Organizations in History

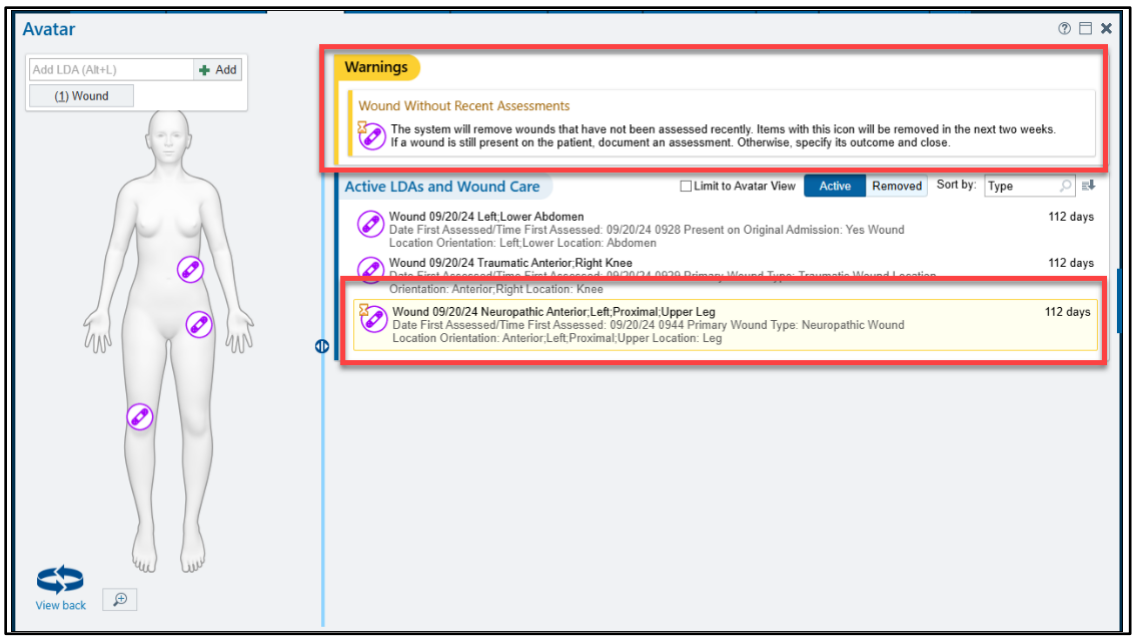
If a patient has birth history information from an outside organization, that information now appears for reconciliation right where you normally document patient history, allowing you to review and file it to the patient's chart with a few clicks.



LDAs

Old Wounds Are Removed from the Avatar Automatically

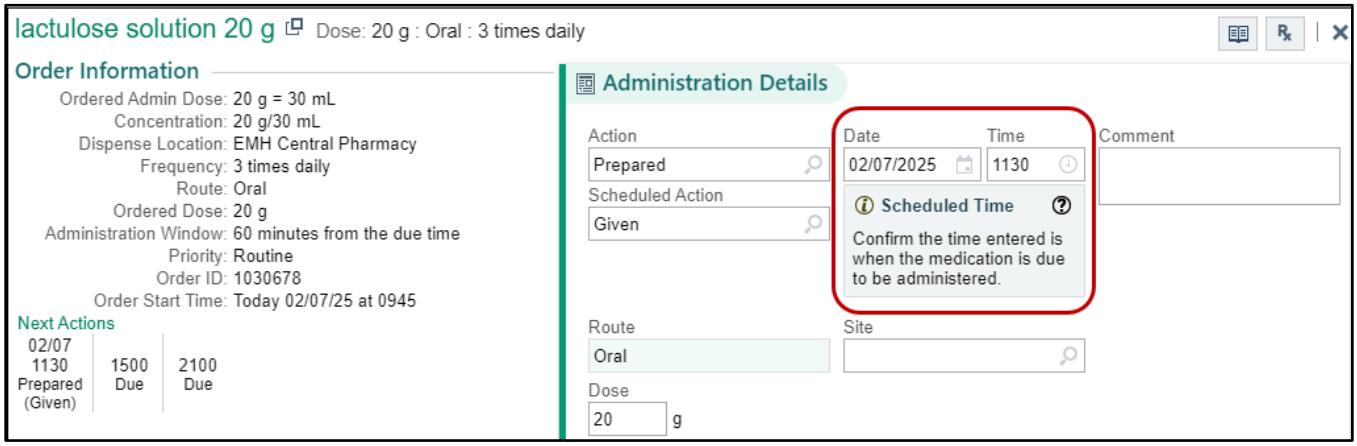
To reduce manual cleanup, wounds that haven't been assessed in 180 days are now removed automatically—you'll get a warning in the LDA Avatar two weeks before a wound is removed to let you know in advance. In this example, the third wound in the list, on the left upper leg, will be removed automatically within the next two weeks.



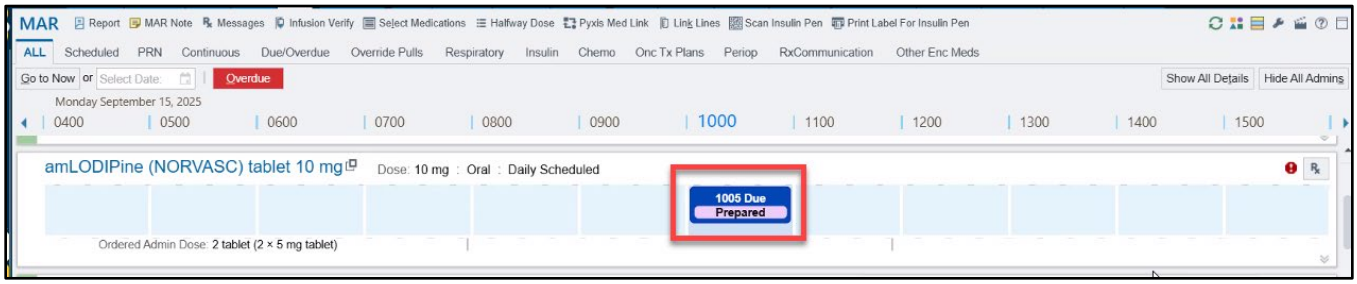
Medication Administration

Mark Medications As Prepared, Not Pended

When you're preparing a medication for a patient, the Admin form prompts you to use the new Prepared action, instead of pending a Given or New Bag action, to more accurately describe what you're doing. When you document the Prepared action, confirm the time that you’re planning to administer the medication. This action will only be available when working from a Med Room Workstation..

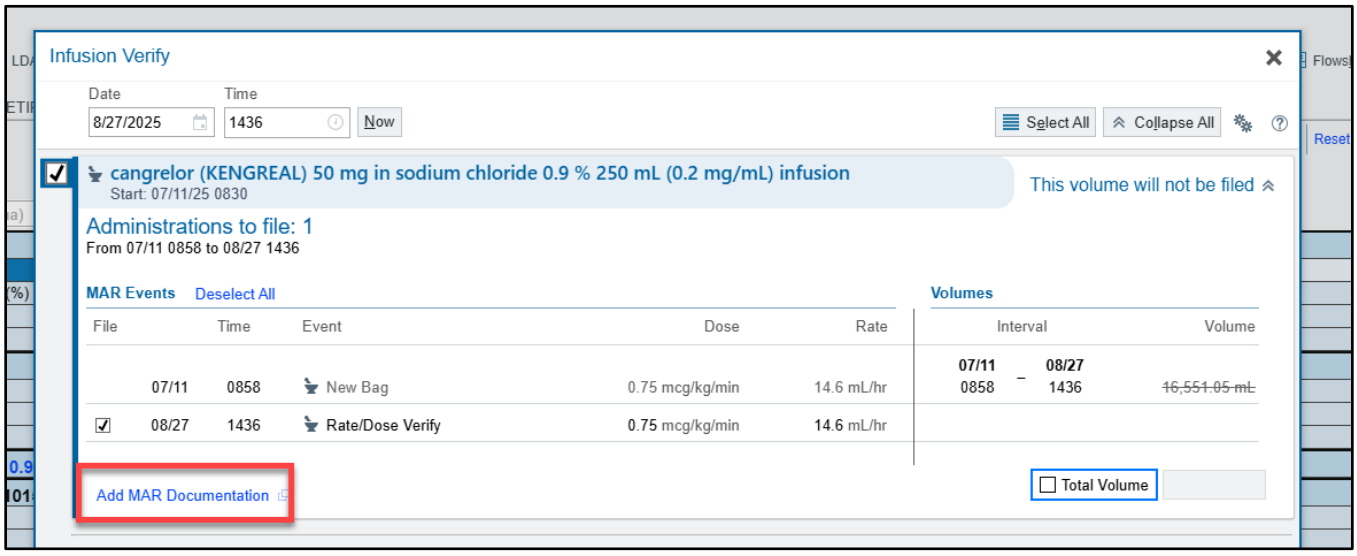


The medication will still needs to be documented in the patient room to complete the medication administration It will have a status of **Prepared** on the MAR



Add Missed MAR Documentation from Infusion Verify

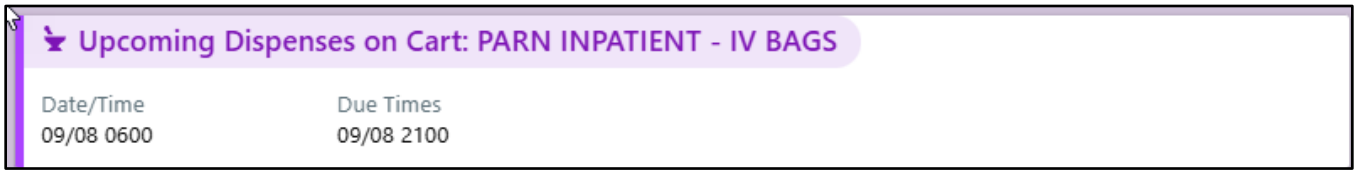
When you're reviewing volumes in Infusion Verify and you realize that you need to document that you already stopped an infusion, you can add that documentation without needing to go back to the MAR.



Medication Dispensing

Quickly Preview Cart Dispenses for an Order

When you're sending a medication message to the pharmacy, the report in the message now shows you upcoming cart dispenses for that medication, making it easier to determine whether you need to request a dispense.

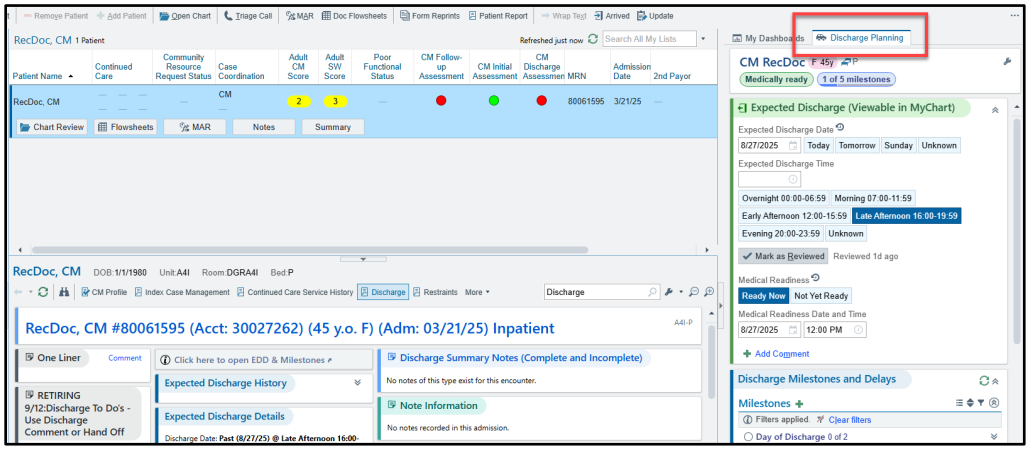


Miscellaneous

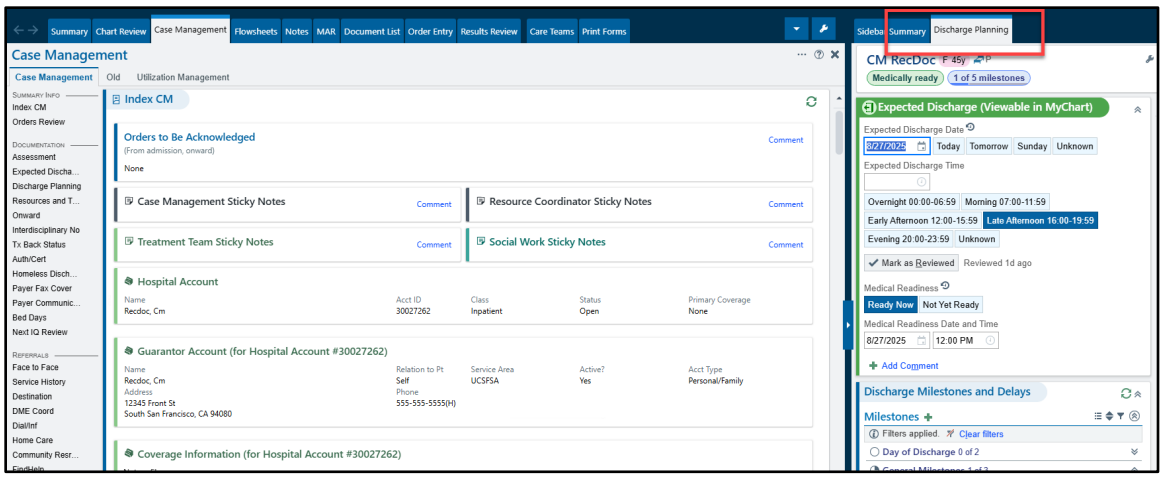
Discharge Planning in the Sidebar

Depending on your role, you can now open Discharge Planning in the sidebar of Patient Lists and/or a patient's hospital chart. This sidebar allows you to more quickly and efficiently document a patient's discharge planning information such as Expected Discharge Date or Time by allowing you to view Discharge Planning and patient information simultaneously.

For all users, the Discharge Planning activity now opens in the sidebar in Patient Lists.

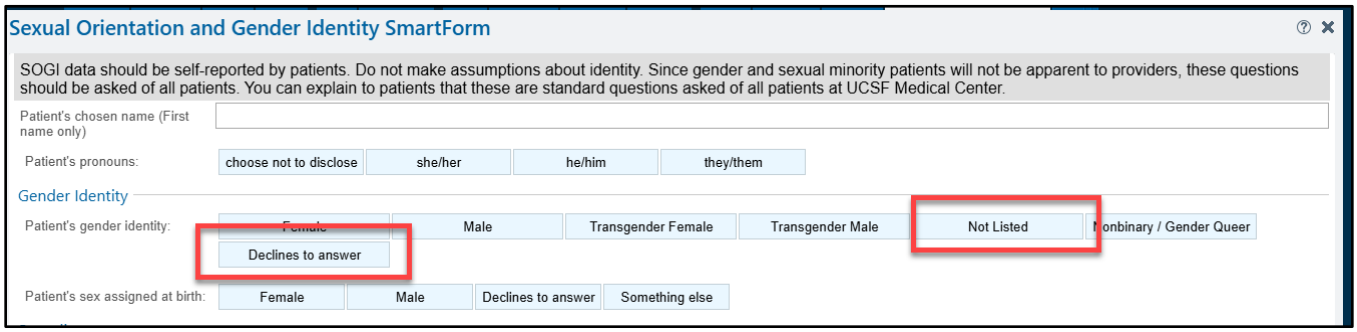


For Case Managers and Social Workers, this is available in Sidebar Reports in the patient's chart as well.



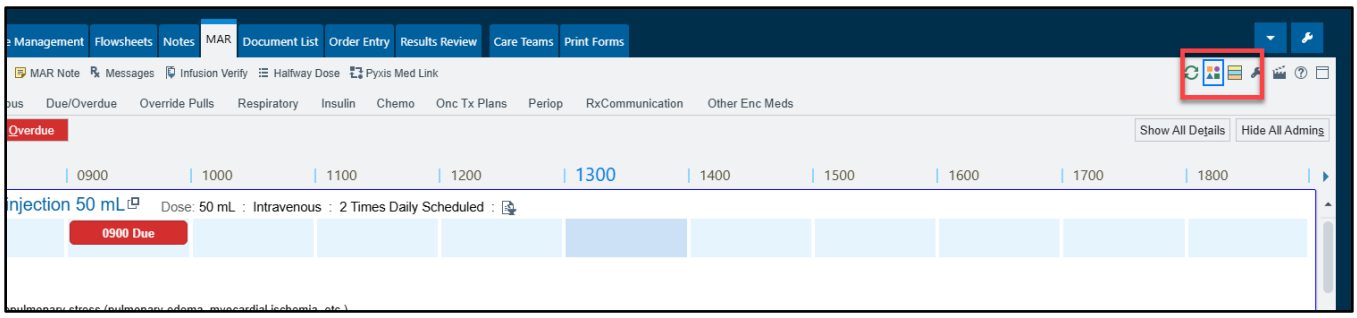
Inclusively Document a Patient's Gender Identity When It's Not Listed

Gender identity choice options have changed in the following way: The term "other" has been replaced with "not listed" as part of a standard update provided by Epic. The wording for these choice options are dictated by Epic and can not be locally customized. **Not Listed** is intended to describe gender identity options that are not listed, and the patient can then enter a free-text response. Patients who do not wish to specify a gender identity should select **Declines to answer**



Notes and Summary Screens Are Cleaner

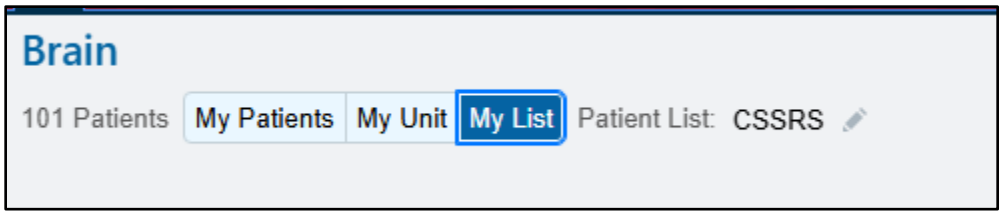
A few rarely used buttons, in the MAR, Summary, Flowsheets, and Notes activities., have moved behind a new menu at the top, so you can keep your focus on more commonly accessed tasks.



Work List and Brain

More Ways to View Patients in the Brain

Three different views are now available in the Brain to help you when you have a duty in addition to caring for your assigned patients, such as working as the charge nurse: patients assigned to you, all the patients on your unit, and a My List of your choice, such as all patients with a certain condition.

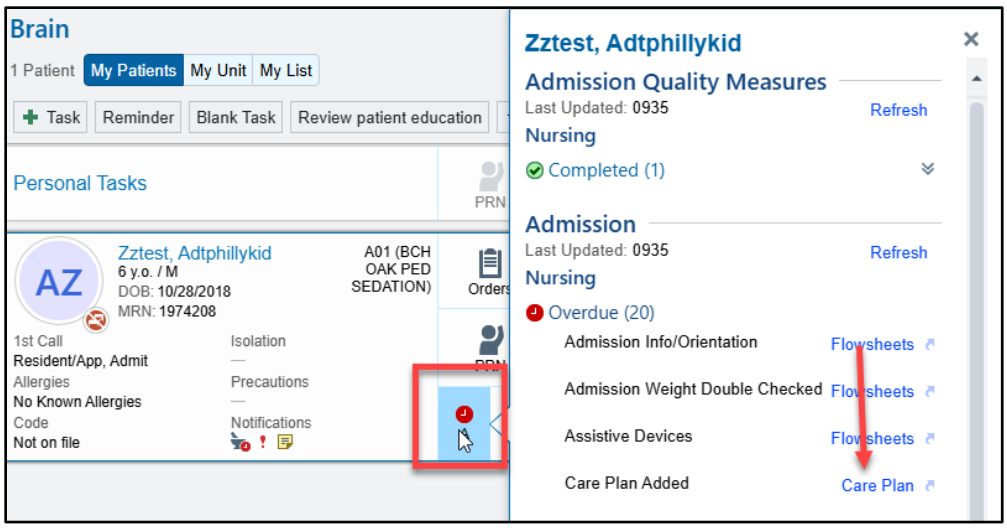


Patient Education

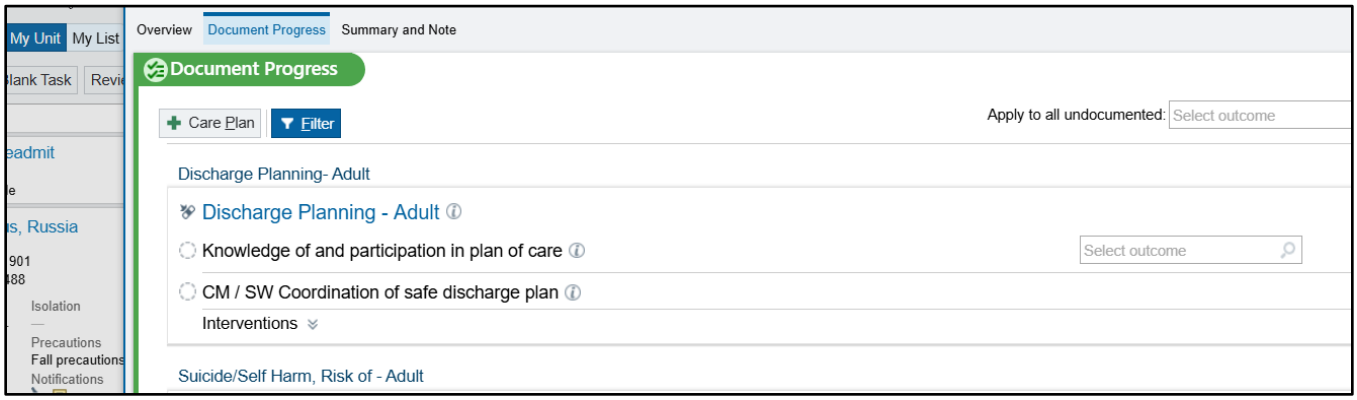
Document Care Plans and Patient Education from the Brain

When you click a care plan or patient education task in the Brain, you can document in a window that appears, right in the activity.

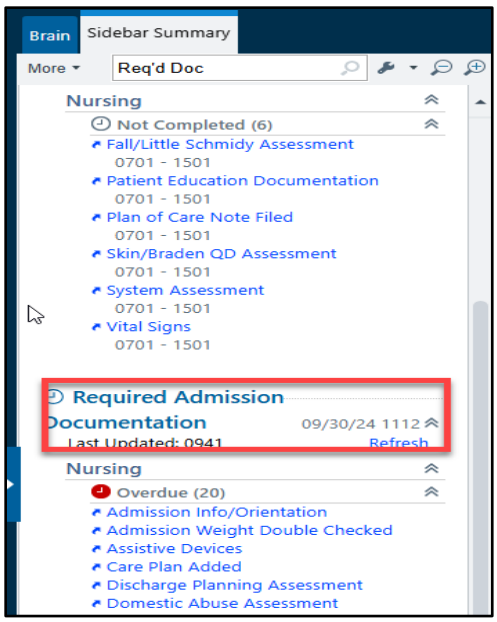
Select **Req Doc** to open and document **Care Plan** or **Patient Education** directly in the Brain.



After selecting, the activity opens in a pop up in the Brain.



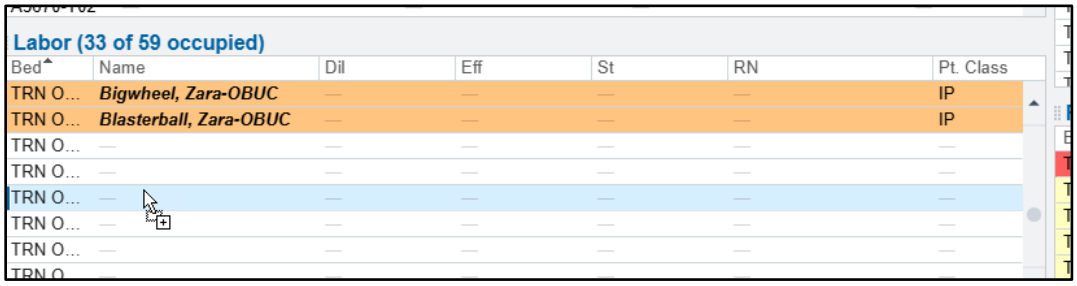
These can also be accessed from the Brain Sidebar in the patients chart.



Patient Tracking

Drag and Drop to Transfer Non-Delivering Patients

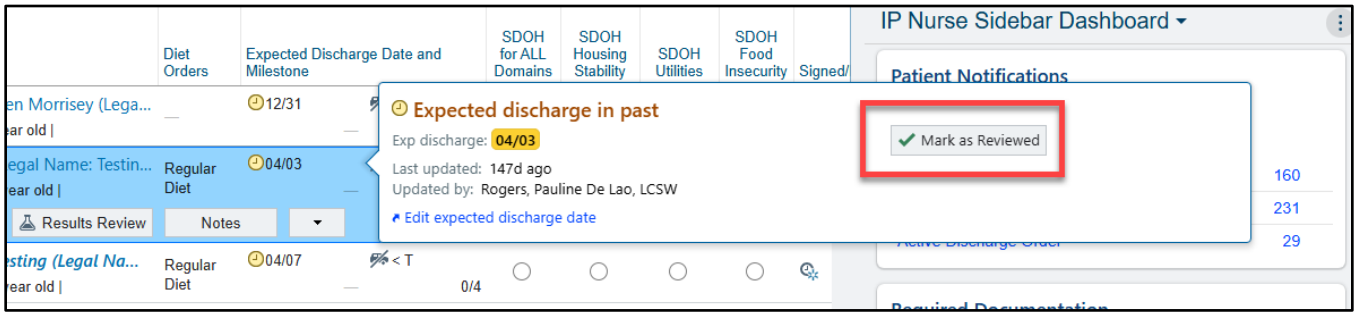
You can transfer a patient who doesn't have an ADT L&D Status, such as a postpartum patient who is readmitted for complications, by dragging and dropping in the L&D Manager and the L&D Map.



Patient/Encounter Activities

Review Discharge Readiness Dates Faster in Patient Lists

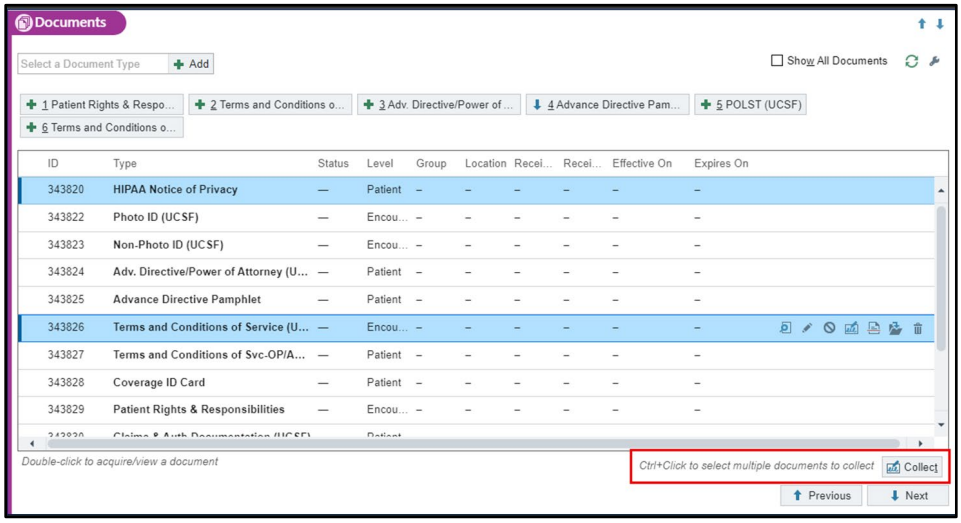
To save time, you can mark a patient's expected discharge date and medical readiness date as reviewed directly from the hover bubble for those columns, so you don't have to open the Discharge Planning activity.

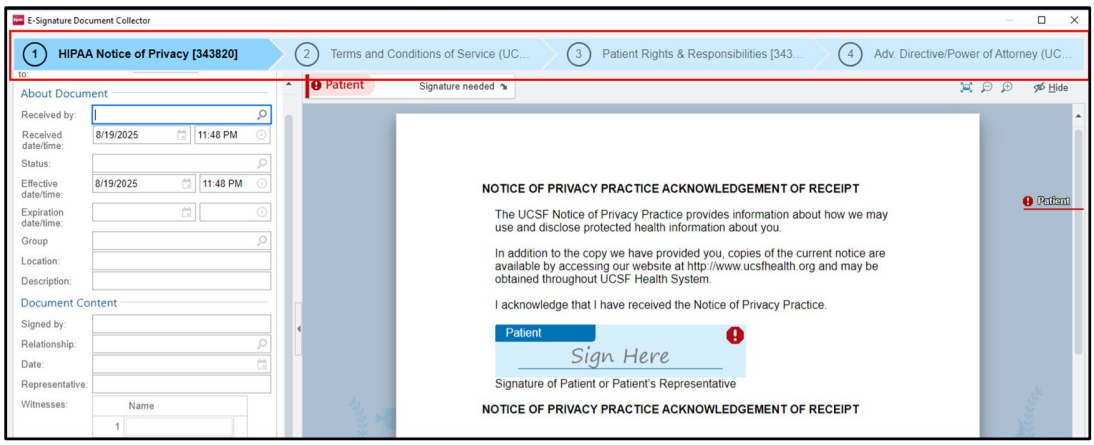


Scans and Media

Select, Collect, and View Multiple Documents

In the Document List, Ctrl+click to select multiple documents and click Collect. After the first document is scanned, signed, or viewed, you can move to the next document without leaving the document collection window.

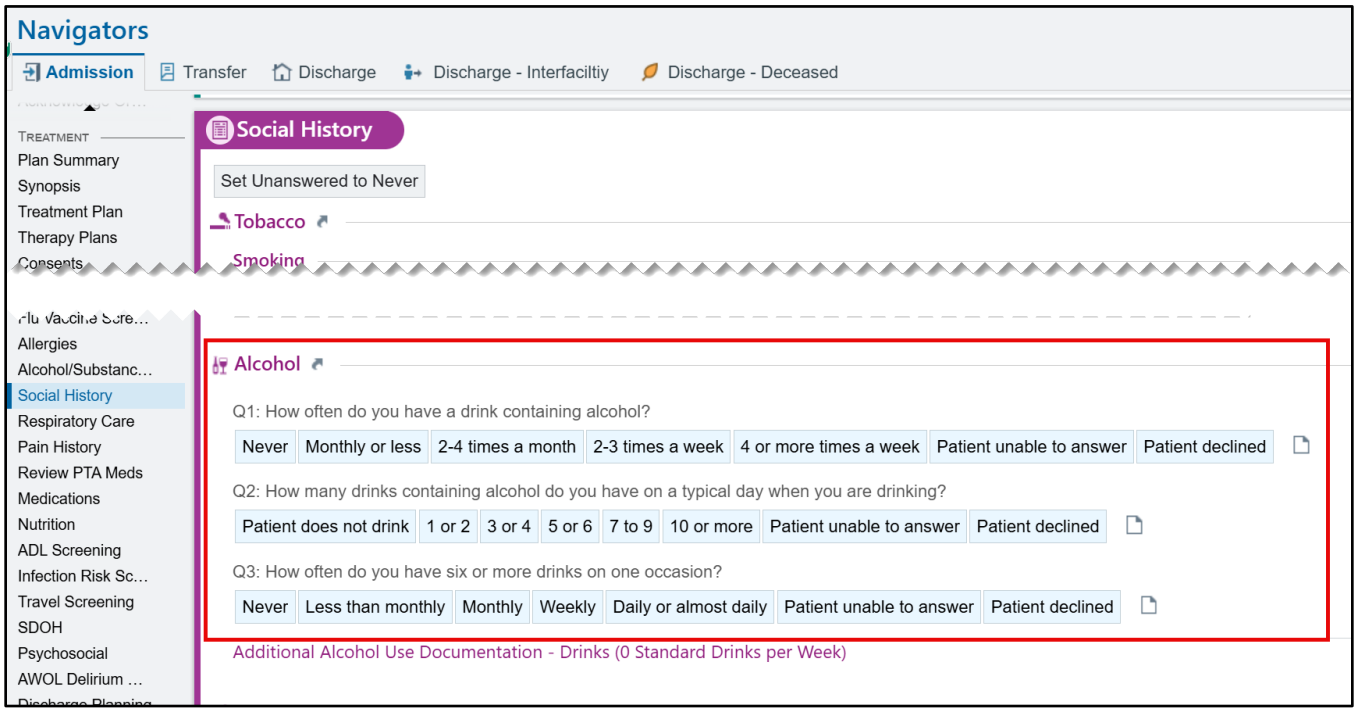




Social Drivers and Networks

Document Alcohol Use Only in History

Documentation in the Alcohol section updates patient social drivers of health, and you see the full assessment instead of a link. For IP areas, this replaces the Single Item Screener for alcohol that was being used previously. Responses will be visible in the SDOH wheel and tracked by the Social work team.

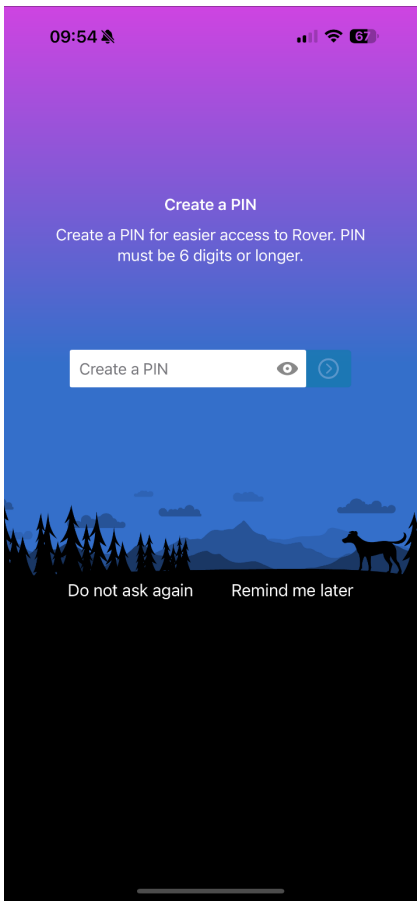


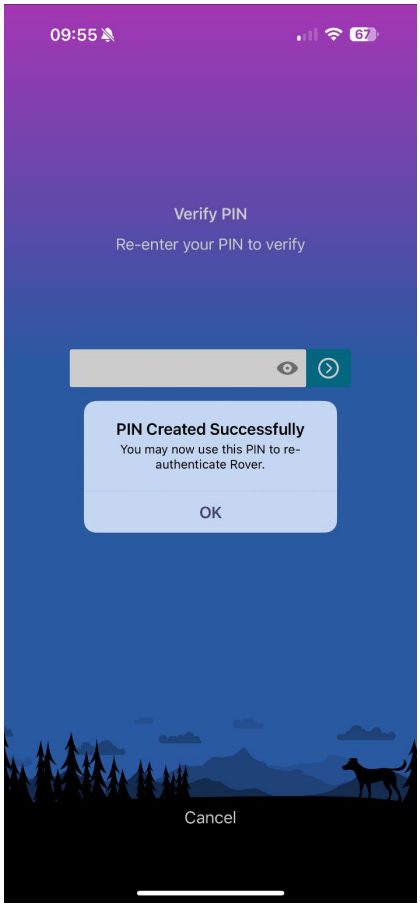
Rover

Rover logins easier and more efficient

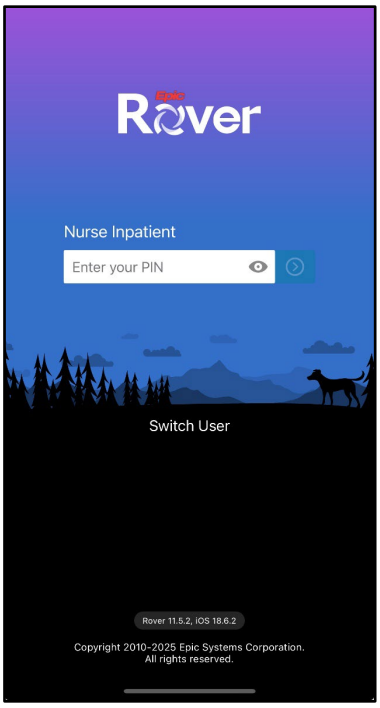
Users can now create and use a unique 6-digit pin for subsequent logins to Rover. After first authenticating with your full username and password and the Rover application times out after 20 minutes of inactivity, users can use their new pin to subsequently log back into the application as opposed to having to re-enter their full APeX password.

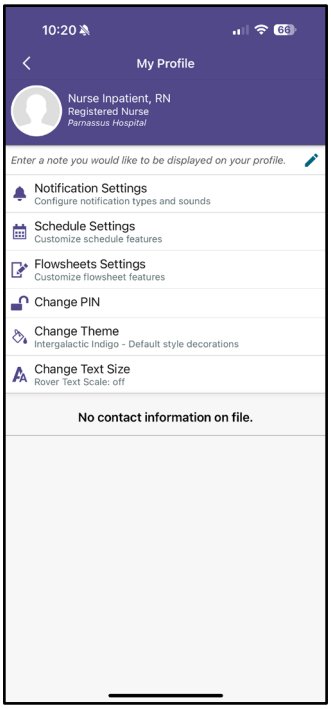
Upon logging into Rover for the first time after this change, you will be prompted to create your 6 digit pin and verify it.





Your pin can be used for subsequent logins for the next 12 hours before needing to authenticate with a full username and password.





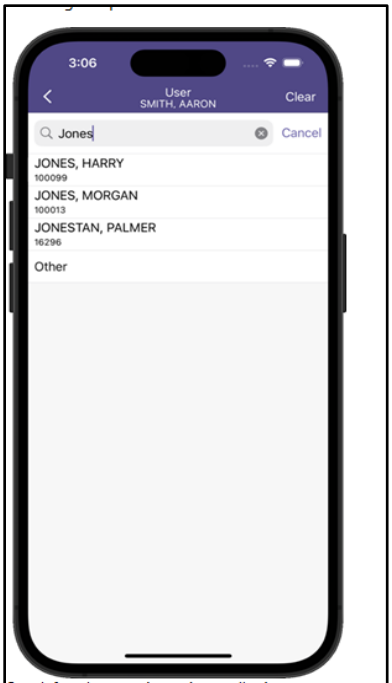
If you manually log out of Rover via the Epic button within the application or there is a period of 2 or more hours of inactivity within the app, you will also need to authenticate with your full username and password again upon logging back into Rover.

If you forget or want to change your pin, you may do so by selecting ‘Switch User’ and reauthenticating with your username and password. Once logged in, go to the Epic button > Click your Name > Change Pin. Enter your username and password and then select a new pin

Orders and Collection

Easier Documentation of Specimen Collection User and Department in Rover

If you do collection in Rover, you can now search for and select other users and departments, saving time and reducing errors when documenting specimen collection information.



Search for other users in specimen collection.

Tasks

Reporting

APeX Reporting Upgrade Resources

Review the Reporting APeX Fall Upgrade 2025 Newsletter for all Reporting upgrade changes. These changes include Reporting Workbench, SlicerDicer and Radar Dahboards.

APeX Reporting Workbench Basics Instructor Led Training

Need to see the next APeX Reporting Workbench Basics class offering? **Click here** to see a list of all upcoming APeX Reporting Workbench classes.

APeX Reporting Office Hours

APeX Reporting Team members and EIA are hosting Office Hours monthly. Get answers to your questions on APeX Reporting content including Reporting Workbench, SlicerDicer and Radar Dashboards, 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
September 18, 2025	**12:10pm - 1:00pm**
October 2, 2025	**12:10pm - 1:00pm**
October 16, 2025	**12:10pm - 1:00pm**
November 6, 2025	**12:10pm - 1:00pm**

New PCMC Dashboards

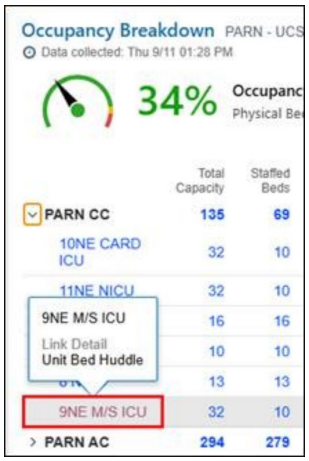
New and improved features for PCMC Dashboards that will enhance data accessibility and streamline workflows.

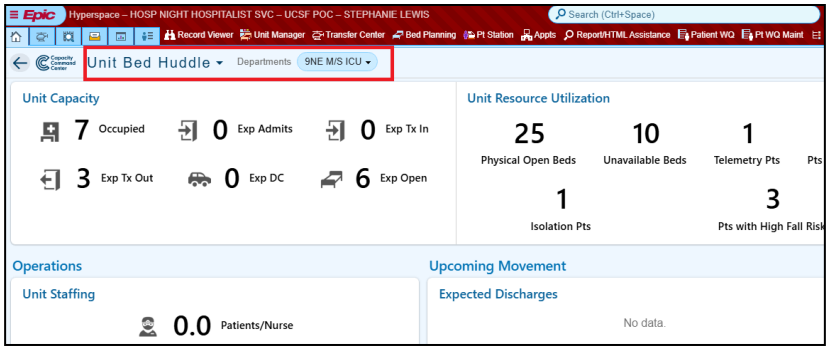
Unit Bed Huddle Dashboard

Gain access to unit-level insights including:

- Capacity
- Utilization
- Estimated Date of Discharge (EDD)
- Discharge milestones
- Bed requests
- Outgoing transfers
- Staffing

To view the Unit Bed Huddle Dashboard, click on department hyperlinks within the Capacity Management.

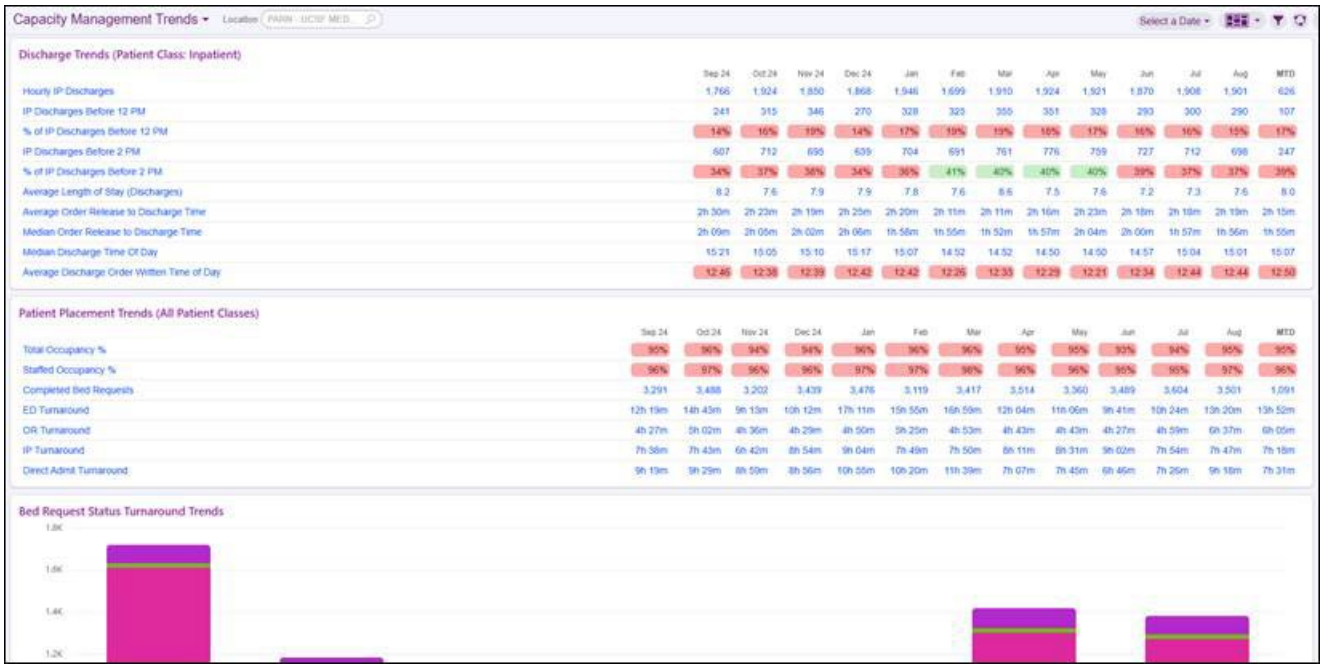




Capacity Trends Dashboard

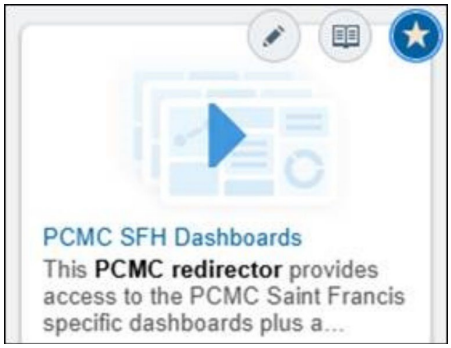
Visualize trending metrics across:

- Bed requests
- Patient placement
- Discharges



Hospital-Specific Dashboard Redirectors

New redirectors for St. Mary's and Saint Francis hospitals will group patient capacity and throughput dashboards by location, making it easier for users to access relevant data.



For information on how to favorite the dashboard redirector, review the Favorite a Dashboard Redirector Tip Sheet.

Retired PCMC Dashboard

Discharge Management Dashboard

This dashboard will be retired. Please, reference discharge milestones to track discharge-related tasks.

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 **APeX Inpatient Nursing & Patient Care Services (Clin Doc) Monthly Updates** directly, join APEXIPRNUPDATE LISTSRV.

To view previous **APeX Inpatient Nursing & Patient Care Services (Clin Doc) Monthly Updates**, click here

The APeX Knowledge Bank- Website

Disclaimer: You are receiving this monthly update because you have been identified as an end user with APeX Inpatient Nursing & Patient Care Services (Clin Doc) security. Content in this update is for educational and informational purposes. Please review for latest APeX Clin Doc 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).