TuftsMedicine

EpicEdge Tips & Tricks

Intake Activity Has a New Look and New Functions

May 24, 2023

Intake is switching to navigator-based Intake activities which offers several key improvements over forms-based Intake activities:

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Forms-based Intake

Navigator-based Intake

- Navigators allow users to access the information they need to complete the intake workflow on a single, scrollable page, rather than jumping between different forms.
- The sidebar Checklist now includes related validation checks. Because the Checklist is updated dynamically as Intake users are working, they can see an up-to-date list of what still needs to be done at any time, rather than having to periodically click the Complete Intake button to see that.
- The sidebar Checklist includes links to take you directly to the missing items.
- The Face to Face now has its own section.
- The PCP can be updated from the storyboard by double clicking in the PCP field.
- There are some customized items like the CNS # that will be found under the Additional Episode Data section which is not shown below.

