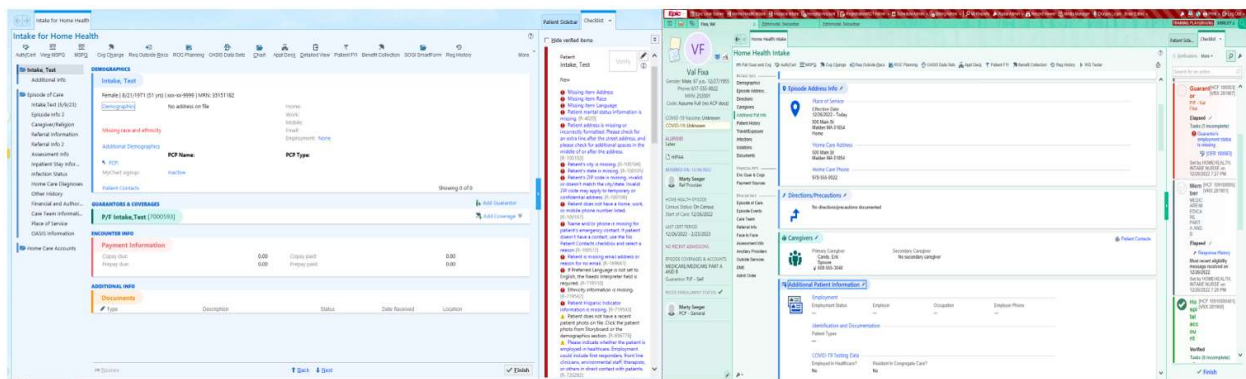


EpicEdge Tips & Tricks

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:



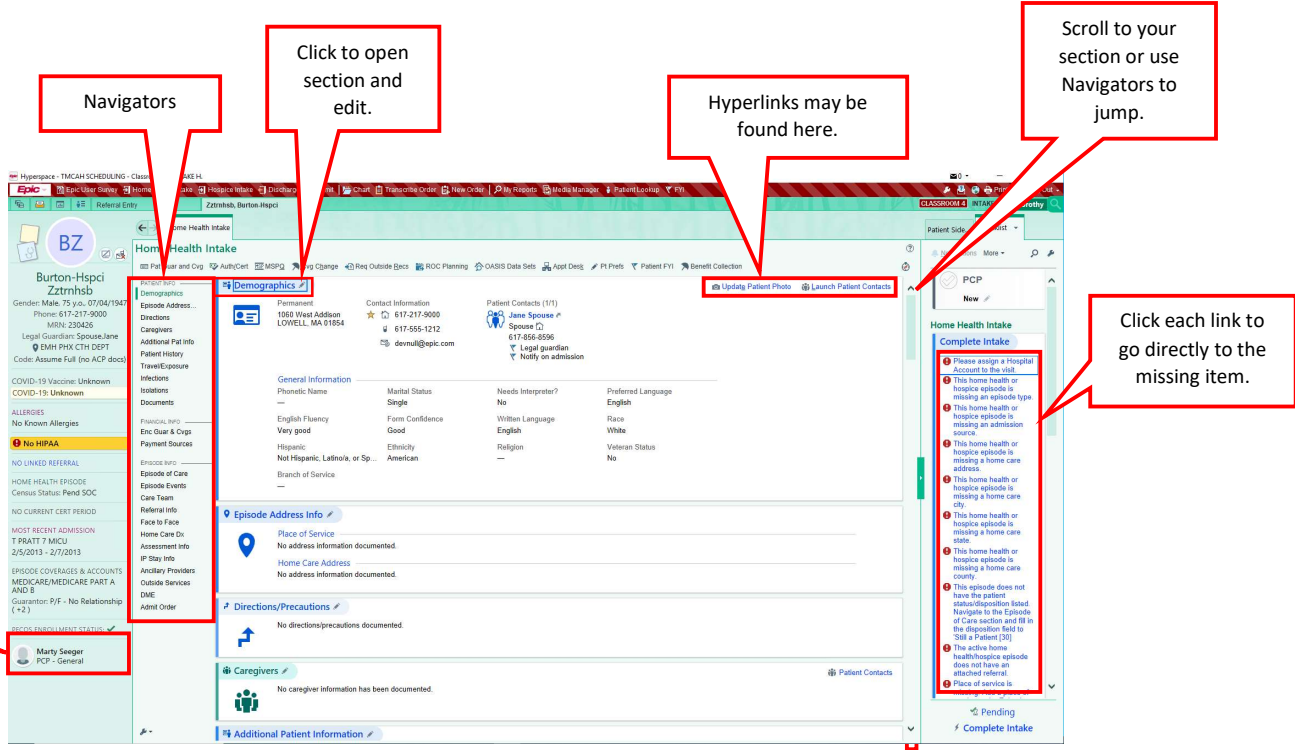
Before

Forms-based Intake

After

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.



Navigators

Click to open section and edit.

Hyperlinks may be found here.

Scroll to your section or use Navigators to jump.

Click each link to go directly to the missing item.

Double click to update PCP.

PCP: Marty Seeger
PCP - General

Demographics
Episode Address...
Caregivers
Additional Pat Info
Patient History
Travel/Exposure
Injections
Documents
FINANCIAL INFO
Encr Out & Crvs
Payment Sources

Demographics
Permanent 1560 West Addison
LOWELL, MA 01854
Contact Information
617-217-9000
617-555-1212
devmu@epic.com
Patient Contacts (11)
Jane Spouse #
Spouse ()
617-856-8596
Legal guardian
Notify on admission
General Information
Phonetic Name
Marital Status
Needs Interpreter?
Preferred Language
English Fluency
Form Confidence
Written Language
Race
Very good
Good
English
White
Hispanic
Ethnicity
Religion
Veteran Status
Not Hispanic, Latino, or Sp...
American
—
No
English
White
No

Update Patient Photo
Launch Patient Contacts

Home Health Intake
Complete Intake
Please assign a Hospital Account to the visit
This home health or hospice episode is missing an episode type
This home health or hospice episode is missing an admission source
This home health or hospice episode is missing a home care address
This home health or hospice episode is missing a home care city
This home health or hospice episode is missing a home care state
This home health or hospice episode is missing a home care county
This episode does not have the patient status/disposition field Navigate to the Episode of Care section and fill in the disposition field to Still a Patient [30]
The active home health/hospice episode does not have an attached referral
Place of service is

Pending
Complete Intake