

Epic Playground Handbook



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Yale *Learn and Grow*

FUNCTIONAL LEARNING

Introduction

The purpose of the *Yale Medicine Training & Development Epic Playground Handbook* is to make it easier for Yale Medicine staff to access and efficiently work in the Epic Playground. The Playground is a valuable resource Epic users can access to practice using the tools and workflows in Epic. The Playground environment is available to our staff at any time and refreshes every day, making it the ideal place for staff to enhance their knowledge and expertise of using Epic.

How to use the *Epic Playground Handbook*

There is information pertaining to three Epic applications covered in the *Epic Playground Handbook*, including:

- Access: Front Desk, Schedulers, Referral, and Registration staff
- Ambulatory: Providers, MAs, Nurses, and Clinical Support staff
- Professional Billing: Authorization, Coding, and Billing staff

To use this guide, first, staff should access and view the [Access the Epic Playground eLearning](#) that is live in Workday LMS. Once staff have reviewed how to log into the Playground, they should navigate to the part of this handbook that corresponds to their Epic application. Each section of the handbook contains information about sample patients' staff can use to practice different workflows. The patient information provided includes the patient's first name. Staff can use any of the last names that appear along with the patient's first name. Staff will also see suggested workflows that they can use for each patient. Please keep in mind that this information may change with each Epic Upgrade.

Access the Epic Playground

To access the Epic Playground, staff need to use specific, assigned usernames and passwords. Production usernames and passwords do not allow access to the Playground environment. To learn more about how to access the Epic Playground, staff can review the [Access the Epic Playground eLearning](#) that is live in Workday LMS.

Access

To practice front desk, scheduling, registration, or referral workflows use the patient information below. The suggested Epic workflows reflect the patient’s use to help train these workflows during YNHH or YM Epic training classes.

Table 1 Access Patient Information Table

Patient	Suggested Epic Workflow
Chloe	<ul style="list-style-type: none"> • Transfer to non-CRM department
Cody	<ul style="list-style-type: none"> • Scheduling sequential appointment • Rescheduling an appointment • Jump to the waitlist
Drake	<ul style="list-style-type: none"> • Manually update coverage with a connectivity error
Emily	<ul style="list-style-type: none"> • Schedule a referral from the Appointment Desk
Everett	<ul style="list-style-type: none"> • Create a worker’s comp coverage and case
Jayjay	<ul style="list-style-type: none"> • Schedule an appointment via CRM • Cancel an appointment • Jump to the waitlist • Reschedule from a tab in the Appointment Desk
Lidia	<ul style="list-style-type: none"> • Create and schedule an appointment for a new pediatric patient
Lois	<ul style="list-style-type: none"> • Chart Review
Lyla	<ul style="list-style-type: none"> • Deactivate and create a new guarantor
Melinda	<ul style="list-style-type: none"> • Route a CRM to a CRM department • Route a call to YM/YNHH billing
Meredith	<ul style="list-style-type: none"> • Create a Telephone Encounter
Miranda	<ul style="list-style-type: none"> • Access 365 Specialty Scheduling Decision Tree
Nico	<ul style="list-style-type: none"> • Create a new adult patient
Nina	<ul style="list-style-type: none"> • Creating with a Telephone Encounter from a CRM • Appointment Request Workqueue • Updating a MSPQ form
Penelope	<ul style="list-style-type: none"> • Scheduling a referral from a workqueue
Stu	<ul style="list-style-type: none"> • Adding coverage to an existing pediatric patient

Ambulatory

To practice Ambulatory workflows such as rooming patients, updating charts, or updating progress notes, use the patient information below.

Table 2 Ambulatory Patient Information Table

Patient Name	Epic Workflow	Epic Role
Fillipe Fatima	Chart Review	• Clinical Support
Nadir Neil	Office Visit Workflow	• Clinical Support
Phoebe Nancy	In Basket	• Clinical Support
Fred	SnapShot Report	• Clinical Support

Professional Billing

To practice working with professional billing workflows use the patient information below.

Table 3 Professional Billing Patient Information Table

Patient	Epic Workflow
Saburo	<ul style="list-style-type: none"> • Fix a missing claim
Haroon	<ul style="list-style-type: none"> • Working claims requiring attachments
Janelle	<ul style="list-style-type: none"> • Managing clearing house errors
Rudy	<ul style="list-style-type: none"> • Fixing a missing ICN
Lynn Melissa Edna Garett	<ul style="list-style-type: none"> • Charge Review
Zoe Kimberly Maggie Dayanas	<ul style="list-style-type: none"> • Credit Analyst
Peter April Kimberly Olivia	<ul style="list-style-type: none"> • Customer Service
Annie Melinda Benjamin	<ul style="list-style-type: none"> • Insurance follow-up
Chris Aubrey Lynn Melissa Bobbie Leonard	<ul style="list-style-type: none"> • Manual charge

Epic Learning Home Dashboards

In both the Epic Production and Playground environments, staff have access to the Learning Home Dashboard (LHD) tool. There are different Learning Home Dashboards for each Epic application. Each LHD contains information specifically related to its corresponding application in the form of notices about updates and upgrades, tip sheets, and notices about issues with the system that may impact system performance.

Contacts

For help with accessing the Epic Playground, please contact the YM Training & Development – Technology Training Team by emailing learning@yale.edu.

Questions about this course?

Contact: learning@yale.edu

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