

# Ambulatory Specialty/Other APeX Fall Upgrade 2025

## Ambulatory Users

UCSF Health will upgrade to APeX Epic May 2025 version on **Saturday, October 4, 2025.**

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 **For major upgrade changes, please read:**

[Ambulatory Essential APeX Fall Upgrade 2025 Newsletter](#)

## Fall 2025 Upgrade Training Zoom Support

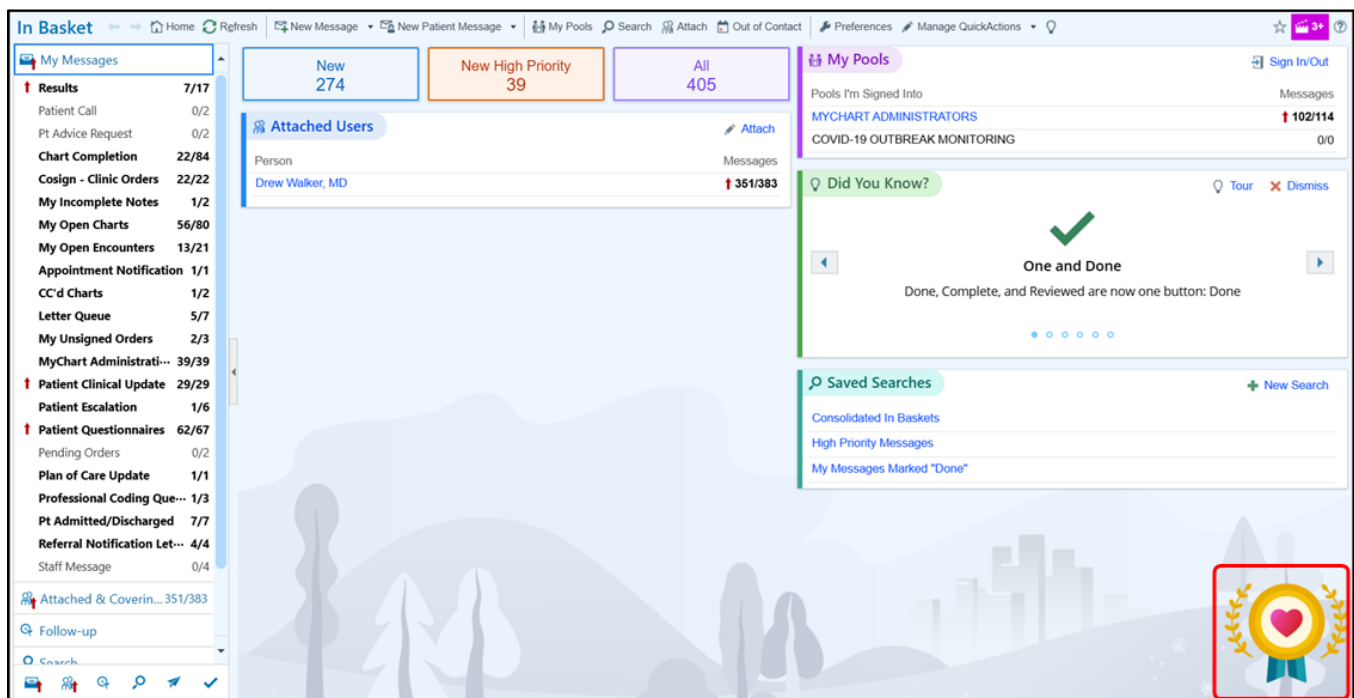
APeX Upgrade support will be available from **Saturday, October 4th to Friday, October 10th** from 7:30 am to 5:30 pm. For assistance, click **APeX Training Support** on Epic toolbar to launch Zoom training support bridge.



Thank you and we look forward to assisting you!

## Gratitude Hub for Thank You Messages in In Basket

Simple thank you messages are already filtered out of your In Basket, but now they're collected in the new Gratitude Hub. When ten or more are received, a gratitude badge will appear in In Basket. Click the badge to open the hub and view appreciation messages from both patients and colleagues.



The messages will still display in Chart Review and will have text to identify it was a hidden message. This change allows staff to focus on messages that require action, while still making it easy to see patient appreciation when needed. If the message contains any attachments, the message will route as normal and will not auto-complete.



## View Related Medications and Labs in the Problem List

Clinicians can now see additional summaries of medications and lab results that are commonly tied to specific problems when reviewing Storyboard or the Problem List activity. This means important treatment details are available at a glance without needing to search through the entire chart.

**PROBLEM LIST**  
CKD (chronic kidney disease) stage 3, GFR 30-59 ml/min (CMS code)

Implants: None  
Last 3 Visits With Me: 4

Social Drivers: [Icons for various social drivers]

**CKD (chronic kidney disease) stage 3, GF...** [N18.30] Noted 8/19/2025

**Relevant Results**

Component Ref Range & Units	Most Recent	1 mo ago (7/28/25)	1 mo ago (7/28/25)	1 mo ago (7/25/25)
<b>CHEM PROFILE</b>				
<b>Creatinine</b> 1.1 - 1.9 mg/dl	1.7 (7/28/25)		1.7	1.7
<b>Cystatin C</b> mg/l	3.0 (7/28/25)	3.0		
<b>Albumin</b> mg/g	4.4 (7/25/25)			4.4
<b>Albumin, Serum</b> mg/g	4.3 (7/25/25)			4.3
<b>URINE CHEMISTRY</b>				
<b>Albumin (Microalbumin), spot urine</b> mg/g	4.5 (7/25/25)			4.5

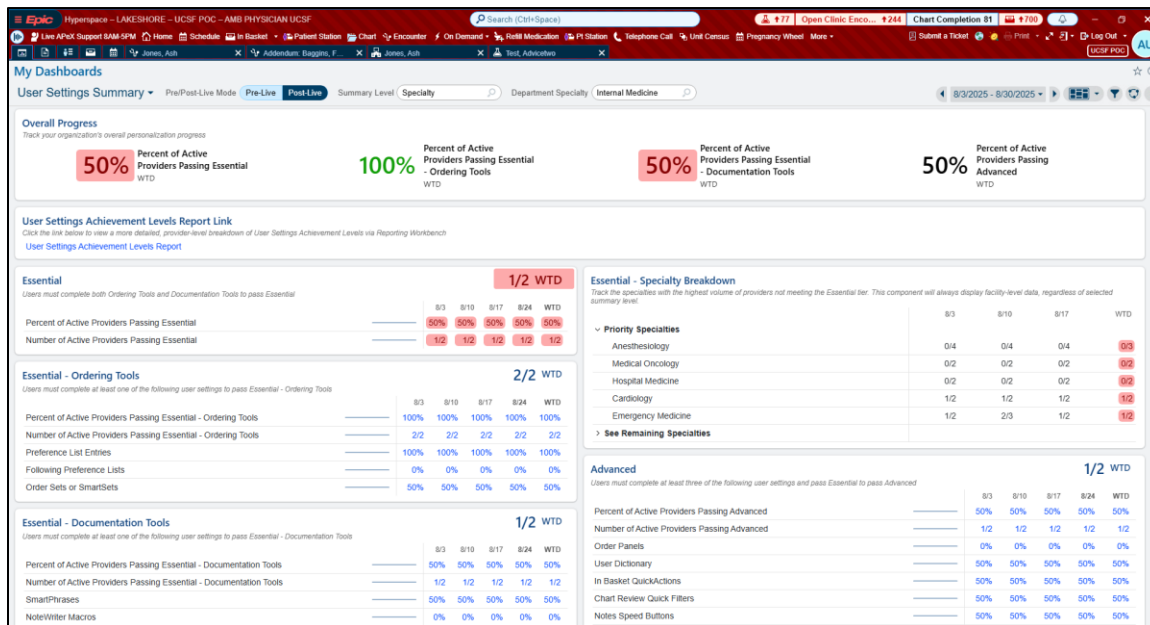
While this is an existing functionality, the list of problems that include summaries has been expanded to include the following:

- Acute Kidney Injury
- Chronic Kidney Disease
- Chronic Obstructive Pulmonary Disease
- Diabetes
- Hypertension
- Osteoporosis
- Proteinuria
- Thromboembolic Disease
- Thyroid Hormone Disorders

- Upper Gastrointestinal Diseases

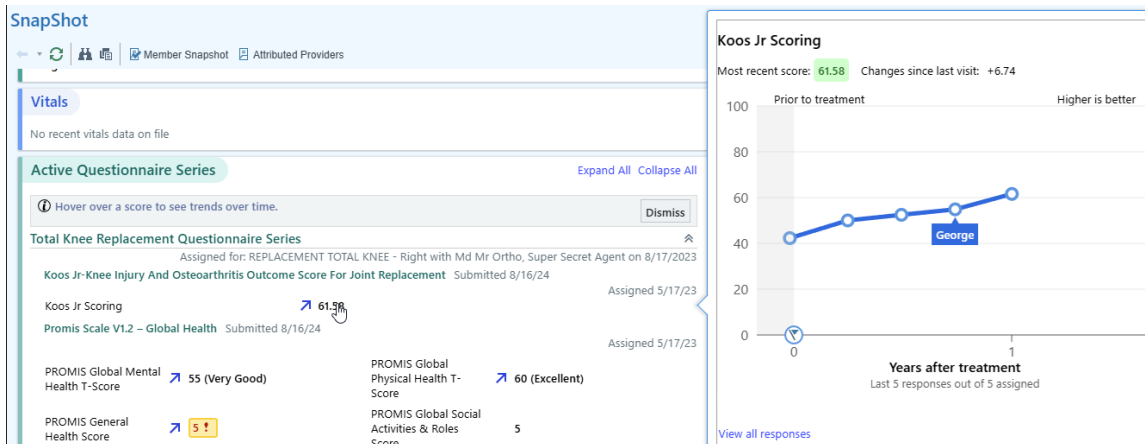
## Track Personalization with the User Settings Dashboard

A new User Settings Summary dashboard makes it easier to track how staff are using Epic personalization tools such as preference lists, SmartPhrases, and In Basket QuickActions. Updated nightly, the dashboard gives managers, trainers, and leaders an at-a-glance view of progress toward personalization goals, trends over time, and areas that need more support. It also links directly to a reporting tool where managers can check the status of individual users in real time, making it simple to confirm when staff have completed tasks like those in a User Settings Lab. Together, these tools help identify where additional training may be needed and give visibility into how personalization is improving across teams.



## Trend and Track Patient-Reported Outcome Measure (PROM) Scores More Easily

Because patient-reported outcome measure (PROM) scores are most meaningful in the context of the patients' previous scores, PROM visuals throughout the system now include trendlines and at-a-glance indicators of whether scores are improving. Clinicians can hover over specific points on the timeline to review the patient's responses for a given date and jump to the Synopsis for additional information when needed.



## Automatically Calculated eGFR for Pediatric Patients

If pediatric patients with chronic kidney disease (CKD) have the relevant lab values, their estimated glomerular filtration rate (eGFR) is automatically calculated, and you can document it in notes with new SmartLinks.

**SmartTool Butler**

U25  Full Text [Refresh](#)

My SmartPhrases  System SmartPhrases  SmartLinks  SmartBlocks

**Matches**

Name	Description
☆ U25EGFRCRE	U25 eGFR Creatinine Equation (2020)
☆ U25EGFRCRECYCYS	U25 eGFR Creatinine-Cystatin Equation (2020)
☆ U25EGFRCYS	U25 eGFR Cystatin C Equation (2020)

Favorites Only

[+ Add to Text](#) [✓ Add and Close](#) [✗ Cancel](#)

If you regularly work with these patients, you can also see this score in list-based activities like your schedule, patient lists, and reports.

Available Columns 4 matches for 'u25'	
Caption	Description
U25 eGFR	These columns display the patient's U25 estimated glomerular filtration rate (eGFR), calculated using creatinine and/or cystatin C.
U25 eGFR Creatinine	Displays the patient's U25 eGFR calculated using creatinine.
U25 eGFR Creatinine-Cystatin	Displays the patient's U25 eGFR calculated using creatinine and cystatin C.
U25 eGFR Cystatin C	Displays the patient's U25 eGFR calculated using cystatin C

## Reconcile Birth History from Other Organizations in the History Navigator and Activity

Birth history details sent through Care Everywhere no longer need to be manually transcribed. Information such as length, weight, and APGAR scores from outside organizations now appears in the Birth History topic of the History navigator and activity, as well as in the Care Everywhere Clinical Summary. Clinicians can review this information and file it directly into the chart with a click. If existing chart details conflict with outside information, the system highlights the differences so they can be reconciled. Clinicians who prefer not to act right away can dismiss the information for the remainder of the visit. This change saves time, reduces duplicate entry, and helps ensure the patient's birth history is accurate and complete.

The screenshot shows the 'History' interface with the 'Birth History' section selected. A dashed blue box highlights a reconciliation area with the following details:

- Reconcile outside history below.** (Buttons: Not Now, Keep All, Discard All)
- Birth length: 0.5 m
- Birth weight: 7 lb 0.9 oz
- Birth head circ: 13.39" (34)
- Discharge weight: 7 lb 11.5 oz (Gained 10.6 oz (0.301 kg))
- Birth Date: 1/23/2025, Age: 27 days
- Birth Time: [empty]
- Gestation age: 39w 0d
- Delivery method: Vaginal, Spontaneous
- Duration of labor: 8 hr 30 min
- Feeding method: Breast Fed
- APGAR 1: 8
- APGAR 5: 10
- APGAR 10: 10

**Hospital information:**

- Days in hospital: 2
- Hospital name: St. Mary's
- Hospital location: Madison

**Comments:**

No complications.

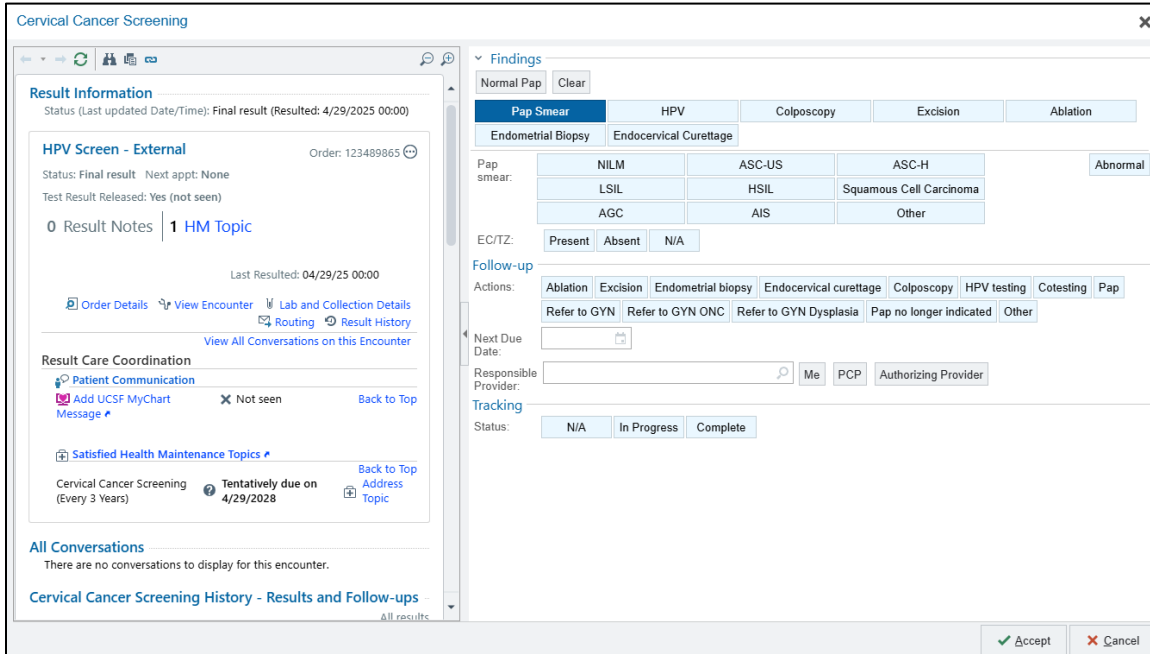
**Reconcile outside history above.** (Buttons: Not Now, Keep All, Discard All)

Buttons at the bottom: Mark as Reviewed, Never Reviewed, Audit Trail Report

## Accurate Forms for Historical Cervical Cancer Screening (CCS) Results

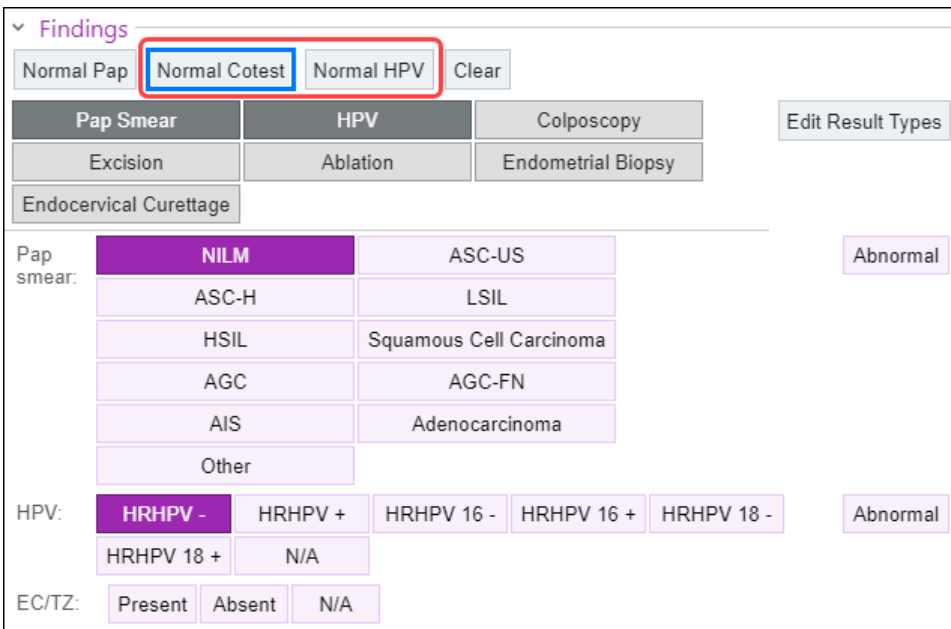
When documenting historical CCS results from outside organizations, staff will now only see the SmartForm that matches the procedure selected, such as Pap, HPV, or Colposcopy. This prevents

mismatched documentation, which in the past could cause the wrong Health Maintenance topic to be marked complete.



## Quickly Document Normal HPV or Cotest Results

Use new speed buttons to record normal HPV and Cotest results with a single click in the Cervical Cancer Screening activity.



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- 💡 Still have questions? Connect with the us directly at [ApeXTraining@ucsf.edu](mailto:ApeXTraining@ucsf.edu)↗

**Disclaimer: You are receiving this monthly update because your APeX responsibilities contain Ambulatory security, including but not limited to reviewing patient charts, rooming patients, placing orders, writing notes, documenting within activities in an encounter, or managing support staff with Ambulatory responsibilities. Content included here is for educational and informational purposes.**

### **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).