

Surg Path: Frozen/Intra-Op Beaker AP Guide:

Create/Edit the Case in Case Builder:

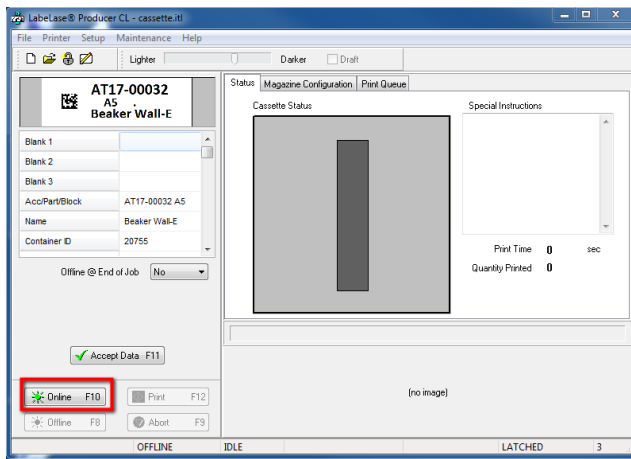
After you receive the frozen specimen, you should make sure that your cassette printer and slide printer is online.

Printing cassettes:

1. On a workstation connected to a Labelase cassette printer, click on the **Labelase Producer CL** icon on your desktop.

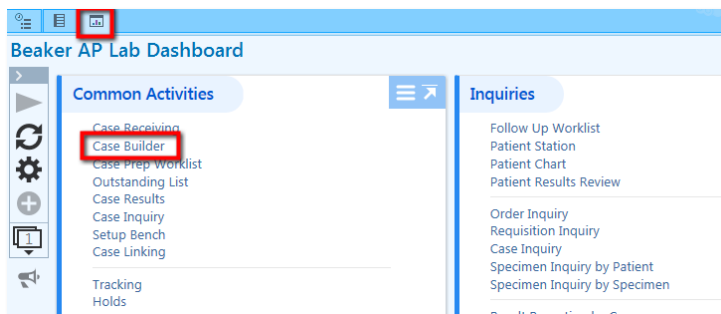


2. Press the **Online** button in the Labelase software.



Using Case Builder:

1. To create a case, you need to enter **Case Builder**. Click on the **Case Builder** link on the Dashboard.



- a. Scan in the specimen using the barcode reader or type the specimen ID# manually. Click the **Accept** button. If this specimen does not have a case assigned previously, it will start a new case. If one exists, then it will open the current case for this specimen in **Case Builder**. **Note:** If your frozen specimen isn't Specimen A, you may get a message asking about leaving placeholders. Make sure to say yes to that window to leave room for specimens the OR hasn't sent yet.

Assigning Roles:

- Once you are in **Case Builder**, assign the case to the staff pathologist who paged you about the frozen. In the **Users Assigned:** field, type in part of the first or last name and it will try to autofill the full name. The Role should auto-populate but if it does not then add the appropriate role in the **Role** Field.
NOTE: If you do not have a staff pathologist assigned, you will not be able to prelim the intra-op!
- The specimen should have been already added from the order. The checkbox near the Frozen (snowflake icon) column signifies this is a frozen specimen.
- The Description text should auto-populate from the **Description** field when the specimen was created. Add **"-FS"** to the end of the Description to signify that this is a frozen sample.
- The Tasks field for this specimen should already be listed. If there are any additional tasks that need to be added, use the **Add Task** field. Make sure if there are multiple blocks that you click on the appropriate block you are trying to add tasks to before adding your task.

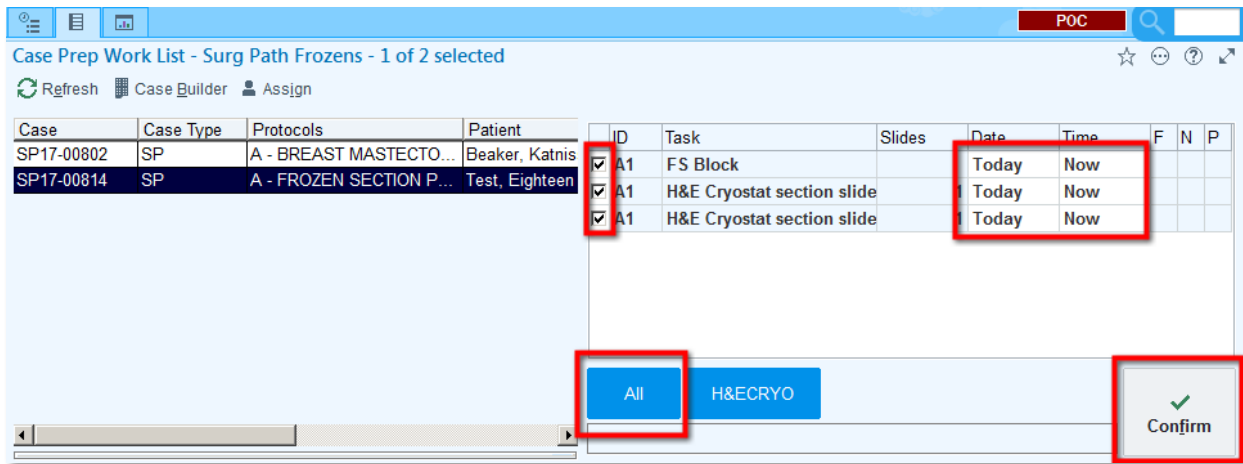


Refer to the **Appendix: Adding Extra Tasks and Printing** at the end of this guide for more information.

- Click the **Accept** button to accession the case. This will automatically print the 2 slides and one 1 cassette as well as a document for hand writing the gross and interpretation. Write the Room # and phone number from the half sheet that came with the specimen on the frozen paperwork that prints.

Using Case Prep Work List:

- To remove the frozen block and slides from the Case Prep Work List, click the tab to open the **Case Prep Work List**. You can also find a link to it from your Beaker AP Lab Dashboard. Make sure you are viewing the **Surg Path Frozen** view. To change your view, click on the **Actions** button and choose **Views** and pick the view you want.



8. Select the cases you want to confirm on the left side of the window. You can hold down the CTRL key to select multiple cases. The tasks for all the selected cases appear on the right.
9. Check off the tasks on the right side that you want to confirm. You can also click the **All** button to confirm all of the tasks for the selected case(s). The current date and time appear by default. If necessary, update the completion date and time to reflect the actual time a task was completed.
10. Click **Confirm**. If all of the tasks were confirmed for the selected cases, those cases will drop off the **Case Prep Work List**.

Entering the Intra-Op/Frozen in Case Builder:

Assigning Roles and Reviewing Case Comments:

1. The 2 slides and 1 cassette are given to the person performing the Intra-Op procedure. They will document the Intra-Op on the frozen worksheet. To enter results of the Intra-Op, you need to enter **Case Builder**. Click on the **Case Builder** link on the Dashboard. Scan in the specimen using the barcode reader or type the specimen ID# manually. Click the **Accept** button.
 - a. You can also select the case in the **Outstanding List**, and click the **Case Builder** button that is located right above the list of specimens. Alternatively, say Dragon command: "Start case"
2. Once you are in **Case Builder**, check to make sure you are assigned to the case.
 - a. In the **User Assigned** field, type part of your first or last name and it will try to auto fill the full name.
 - b. The Role should auto-populate but if it does not then add the appropriate role (Interoperative Consultant) in the **Role** Field.
3. Using the Case Summary section of **Case Builder** (right side), scroll down until you find the **Specimens** section. Make sure to read the **Description** and **Comments** in this section. If during accessioning the Description and Comments fields were not used, then nothing will show below the Specimen ID and Tests.

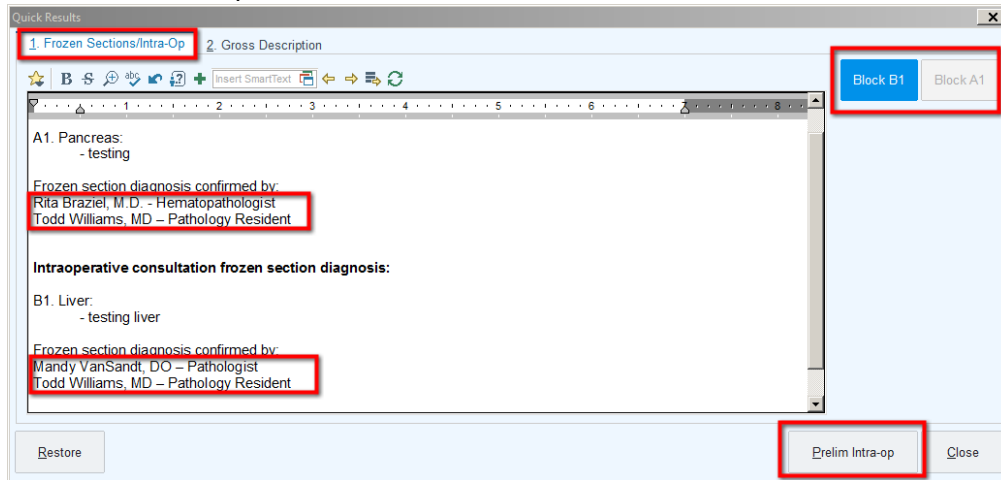
The screenshot shows the Case Builder interface. At the top, there are navigation buttons: Accept, Accept & Stay, Clear Changes, Intra-op, Grossing, and Case Results. Below these are input fields for Case type (SURGICAL PATHOLOGY) and Case number (SP17-00660). A table lists Users Assigned with columns for Name and Role. The 'Specimens' section is highlighted with a red box, showing a table with columns for ID, Tests, and Attributes. The table contains one row with ID 'A', Tests 'SURGICAL PATHOLOGY', and Attributes 'Description: specimen description - free text' and 'Comment: Stitch markings, infection precautions'. Below this is an 'Add Specimen (Alt+D)' button. At the bottom, there is a table with columns for ID, R, Protocol (Alt+1), Source, Code, and Description. The table contains one row with ID 'A', R checked, Protocol 'FROZEN SECTION PROT', Source 'Appendix', Code '88331 (CPT®)', and Description 'specimen description - free te'.

Entering the Intra-Op/Frozen in Case Builder:

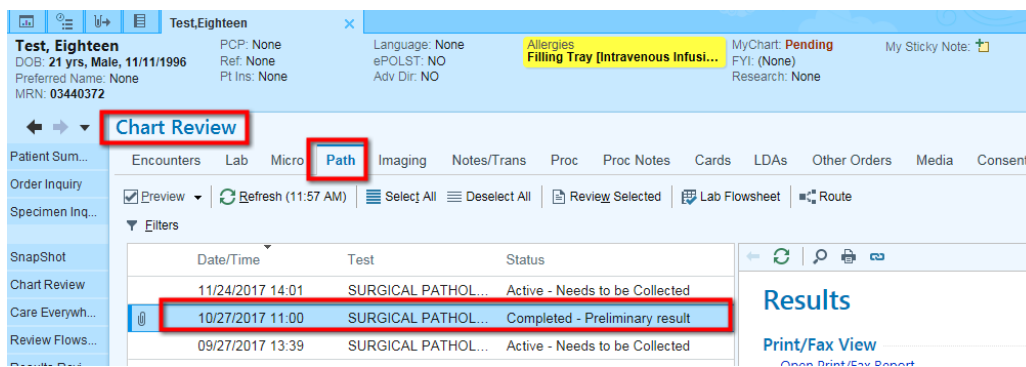
4. Click on the **Intra-Op** button to start the Intra-Op.

The screenshot shows the Case Builder interface. At the top, there are navigation buttons: Accept, Accept & Stay, Clear Change, Intra-op, Grossing, and Case Results. The 'Intra-op' button is highlighted with a red box. Below these are input fields for Case type (SURGICAL PATHOLOGY) and Case number (SP17-00814). The 'Case Summary' section is visible on the right side, showing 'Procedure' and 'OTHER - PLEASE'.

- This will bring up the **Quick Results** window. Make sure the **1. Frozen Sections/Intra-Op** tab is selected at the top of the window.



- Depending on how many specimens you assessioned, there may be multiple blocks listed. A default text template will appear, enter the results of the Intra-Op. If you need to exit this window and return to the case to look up a detail about the patient, click the **Close** button (not the Prelim Intra-Op!)
- Under the line “Frozen section diagnosis confirmed by”: use your **.name** Smartphrase to add your name in the text field.
- When you are completely done with the results of the Intra-Op, then click the **Prelim Intra-Op** button. Note: A Staff Pathologist role must be assigned in order for the the Prelim Intra-Op to work.
- This will release a preliminary result to the patient’s chart so that the OR can see the results. To see the status in the patient’s chart, then click on the **Chart Review** button on the left side of **Case Builder**. In the Chart Review window, click on the **Path** Tab.

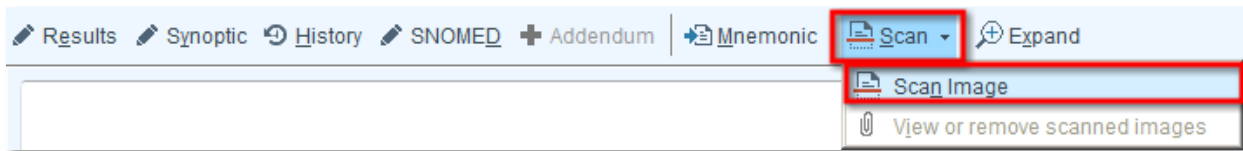


The paper work and any left over specimen will be returned to the accessioner. The frozen worksheet will need to be scanned into Case Results and if there is an adequate amount of leftover sample, the frozen specimen protocol will be changed to the the actual specimen type in Case Builder.

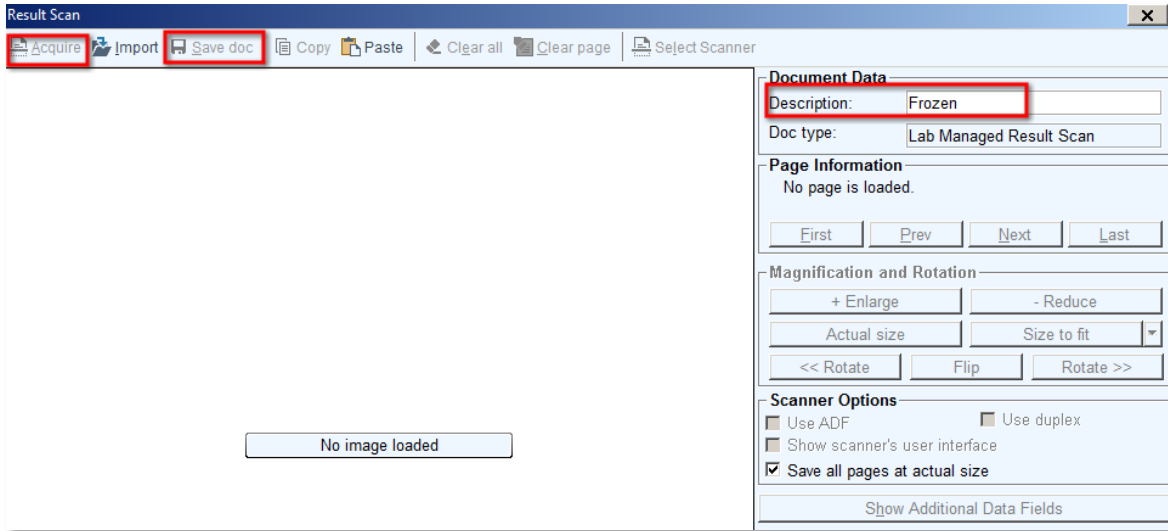
Scanning Frozen Paperwork into Case Results:

- Open the case in **Case Results** by scanning a barcode label while viewing the **Outstanding List**. To scan in any documentation into the case, click on the **Scan** icon on the middle toolbar of **Case Results**, and

choose **“Scan Image”**. Make sure you are on a workstation with a scanner attached to it.



11. Type in some descriptive text in the Description field. Ex. “Frozen”
12. Click on the **“Acquire”** button. After the document has been scanned in, you should see the scan in the scan window. Click the **Save Doc** button when you are ready to accept the scan.



Changing the Frozen Specimen Protocol:

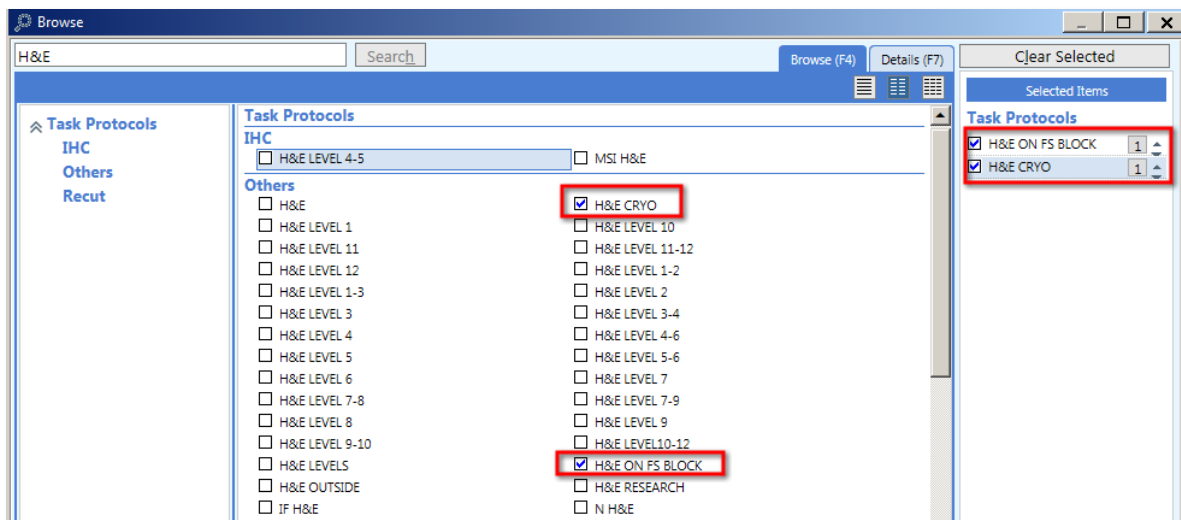
13. Go into **Case Builder** by using the button on your **Case Results** toolbar. If there is enough sample, change the Specimen Protocol from “Frozen Section Protocol” to the appropriate specimen. Ex. “Lung Biopsy”. This will add a Block and a H&E level to the Tasks. Make sure you add “-FS” at the end of the **Description** field if you did not add this before to designate that this was a frozen sample.

ID	R	Protocol (Alt+1)	Source	Description	Coll Date	Coll Time	C
A	✓	LUNG BIOPSY	Lung - left	lung-FS	1/14/2018	02:27 PM	

14. Click on the new block that was added to the Task list, and click the **Delete Selected** button.

Add Task (Alt+R)		+ <input type="checkbox"/> Select Multiple Blocks		- Delete Last Block		- Delete Selected	
ID	C	Task (Alt+2)	Slides	Code	Qty	Task Flags	Task Note
A1	✓	FS Block					
A1.1	✓	H&E Cryostat section slide	1				
A1.2	✓	H&E Cryostat section slide	1	88331 (CPT®)	1		
A1.3	✓	H&E on a FS BLOCK	1				
A2	✓	BLOCK BIOPSY					
A2.1	✓	H&E, Levels	1				

15. In the **Add Task** field, type in **“H&E”** and press Enter. Check off the **H&E Cryo** task and the **H&E on FS Block** task. Press the **Accept** button.



16. Another H&E on the FS Block and H&E Cryostat section slide task should show up below the previous frozen tasks.

ID	C	Task (Alt+2)	Slides	Code	Qty	Task Flags
A1	✓	FS Block				
A1.1	✓	H&E Cryostat section slide	1			
A1.2	✓	H&E Cryostat section slide	1	88331 (CPT®)	1	
A1.3	✓	H&E on a FS BLOCK	1			
A1.4	✓	H&E on a FS BLOCK	1			
A1.5	✓	H&E Crvostat section slide	1			


Receiving non-frozen specimens:

Usually, after receiving the frozen specimens you will also receive the non-frozen specimens for the case. These specimens need to be accessioned into Case Builder and you will need to manually print the specimen labels.

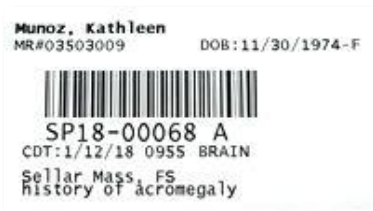
1. Click on the **Case Builder** link from the **Beaker AP Lab Dashboard** and either scan the barcode of the non-frozen specimens or type the specimen ID manually.
2. Check that all the information for that specimen is filled out on that specimen's row.
3. If you need to add any tasks to that specimen, make sure you click on that specimen protocol and then click on the block you are trying to add the task. Click in the **Add Task** field and type in part of the name of the task and press Enter. Check off the tasks you want to add and press the **Accept** button.
4. Press the **Accept** button to save and close out of **Case Builder**.

Printing out non-frozen specimen labels:

When you check in non-frozen specimens, the Beaker specimen label will not print automatically when you accession the case. To print a AP Specimen label:

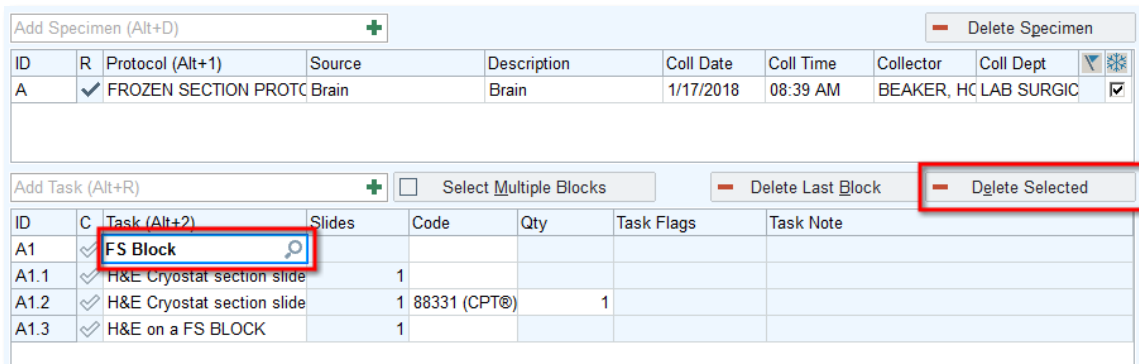
1. In Case Builder, click on the  **Actions** button and choose **Labels and Docs**. (Alternatively, you can personalize your Case Builder tool bar to have the Labels and Docs as a button).
2. Select “**Label**” for the Document type:.
3. Click on the **Print New** option.
4. Choose “**OHSULAB AP Specimen Label**” by clicking on the magnifying glass next to the Print New Field.
5. Select your workstation printer for the Printer field.
6. Select “**1 per Specimen**” for the Copies field. Note: if you leave it on one per container, you will print a lot of erroneous extra labels!
7. In the Specimen field, choose the specimen you want to print. The settings should look like the following:

8. Click the **Print** button. The label should look like this:

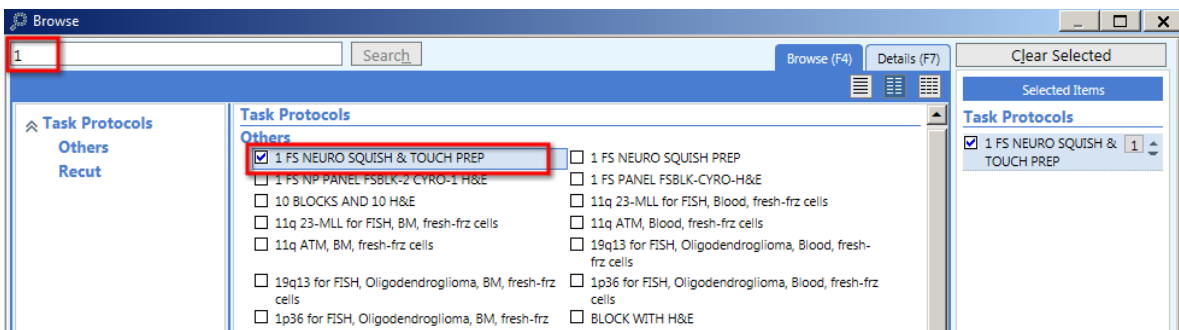


Neuro Frozens:

- Click on the **Case Builder** link from the **Beaker AP Lab Dashboard** and either scan the barcode of the frozen neuro specimens or type the specimen ID manually.
Note: If your frozen specimen isn't Specimen A, you may get a message asking about leaving placeholders. Make sure to say yes to that window to leave room for specimens the OR hasn't sent yet.
- Once you are in **Case Builder**, assign the case to the staff pathologist who paged you about the frozen. In the **Users Assigned:** field, type in part of the first or last name and it will try to autofill the full name. The Role should auto-populate but if it does not then add the appropriate role in the **Role** Field.
NOTE: If you do not have a staff pathologist assigned, you will not be able to prelim the intra-op!
- If you have more than one Specimen Protocol, then click on the Frozen specimen. Then click in the **Task** field for the **FB Block** row to select that row and press the **Delete Selected** button. That should remove the block and tasks that were added by default for that frozen specimen.



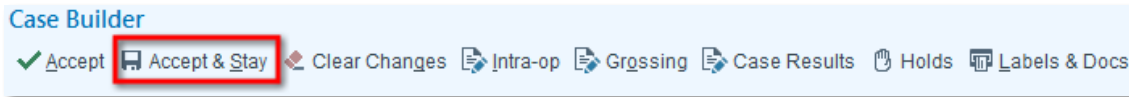
- Click in the **Add Task** field, and press "1" and press Enter. Check off the "1 FS NEURO SQUISH & TOUCH PREP" and press the **Accept** button.



- The following tasks will be added. Note: The Block NP and the last H&E is for future use when you switch the sample from frozen protocol to brain protocol. (see step 12)

ID	C	Task (Alt+2)	Slides	Code	Qty	Task
A1	✓	Block NP FS				
A1.1	✓	H&E Cryostat section slide	1			
A1.2	✓	H&E Cryostat section slide	1	88331 (CPT®)	1	
A1.3	✓	TOUCH PREP ADD	1			
A1.4	✓	SQUISH PREP ADDITIONAL	1			
A1.5	✓	SQUISH PREP ADDITIONAL	1			
A1.6	✓	H&E on a FS BLOCK	1			
A2	✓	Block NP				
A2.1	✓	H&E	1			

- Press the **Accept and Stay** button to save your changes and accession your frozen sample. It will print 1 block, 5 paper slide labels and 1 frozen worksheet. Give these items to the resident/PA.



- To remove the frozen block and slides from the **Case Prep Work List**, click the tab to open the **Case Prep Work List**. You can also find a link to it from your Beaker AP Lab Dashboard. Make sure you are viewing the **Surg Path Frozen** view. To change your view, click on the **Actions** button and choose **Views** and pick the view you want.
- Find your case and check off all the tasks associated with the frozen. Click the **Confirm** button.

Case Prep Work List - Surg Path Frozen 1 of 14 selected

Refresh Case Builder Assign Views

Case	Case Type	Protocols	Patient	ID	Task	Slides	Date	Time	F
SP18-00064	SP	A - PROSTATE NEEDLE ...	Beaker, Barric	✓ A1	Block NP FS		Today	Now	
SP18-00065	SP	A - FROZEN SECTION P...	Lannister, Tyri	✓ A1	H&E Cryostat section slide	1	Today	Now	
SP18-00069	SP	A - SYNOVIUM, B - SYN...	Turney, Anest	✓ A1	H&E Cryostat section slide	1	Today	Now	
SP18-00073	SP	A - LUNG BIOPSY	Beaker, Yoda	✓ A1	TOUCH PREP ADD	1	Today	Now	
SP18-00085	SP	A - SOFT TISSUE MASS	Radiant, Cathy	✓ A1	SQUISH PREP ADDITIONAL	1	Today	Now	
SP18-00086	SP	A - LUNG BIOPSY, B - F...	Arctic, Ocean	✓ A1	SQUISH PREP ADDITIONAL	1	Today	Now	
SP18-00087	SP	A - BRAIN/MENINGES N...	Beaker, Zsa Z	✓ A1	SQUISH PREP ADDITIONAL	1	Today	Now	
SP18-00088	SP	A - KIDNEY NATIVE EM ...	Beaker, Ziggy						

SP18-00087 Status: Accessioned
Beaker, Zsa Zsa (MRN 03502980)
F, 98 yrs, 1/1/1920
%RO6282 submitted by OHSU PATIENT

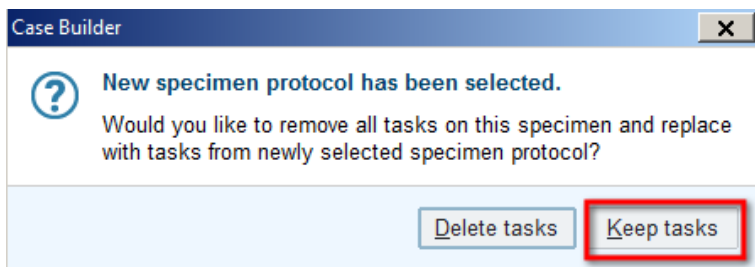
All H&ECRYO SQUISHPREPA D Confirm

Changing the Frozen Neuro Specimen Protocol:

- When the Intra-Op is complete, the resident/PA should return the frozen worksheet and the extra sample to you. Go into **Case Builder** for that case. If there is enough sample, change the Specimen Protocol from “Frozen Section Protocol” to the appropriate specimen. Click on the FROZEN SPECIMEN PROTOCOL and delete that protocol. Type in “brain” and press Enter. You should have 3 choices. Choose the appropriate choice. Click on the **Accept** button.

Name	Report Name	Charge IDs
BRAIN BIOPSY	BRAIN BIOPSY	88307, MC8000556
BRAIN/MENINGES NOT TUMOR	BRAIN/MENINGES NOT TUMOR	88305, MC8000555
BRAIN/MENINGES TUMOR RESEC...	BRAIN/MENINGES TUMOR RES...	88307, MC8000556

10. A message will pop up. **MAKE SURE TO CHOOSE THE “Keep Tasks” BUTTON!**



- In the **Description** field for the specimen protocol you just changed, make sure you add “-FS” at the end of the description to designate that this was a frozen sample.
- The “Block NP” and the “H&E” that was already added in when you picked “1 FS NEURO SQUISH & TOUCH PREP” is for the new protocol you just added.
- Press the **Accept and Stay** button to save your changes.


Receiving non-frozen specimens:

Usually, after receiving the frozen specimens you will also receive the non-frozen specimens for the case. These specimens need to be accessioned into Case Builder and you will need to manually print the specimen labels.

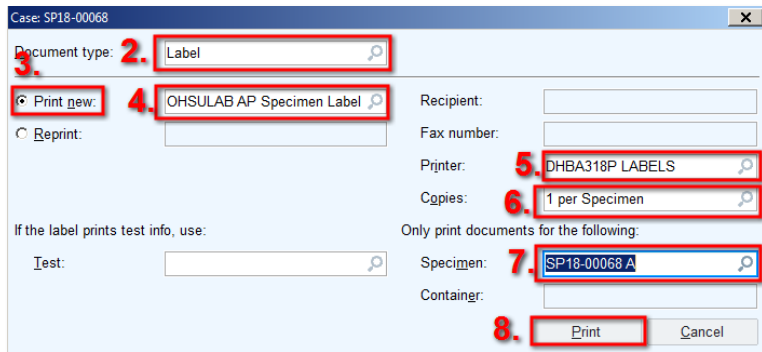
- Click on the **Case Builder** link from the **Beaker AP Lab Dashboard** and either scan the barcode of the non-frozen specimens or type the specimen ID manually.
- Check that all the information for that specimen is filled out on that specimen’s row.
- If you need to add any tasks to that specimen, make sure you click on that specimen protocol and then click on the block you are trying to add the task. Click in the **Add Task** field and type in part of the name of the task and press Enter. Check off the tasks you want to add and press the **Accept** button.
- Press the **Accept** button to save and close out of **Case Builder**.

Printing out non-frozen specimen labels:

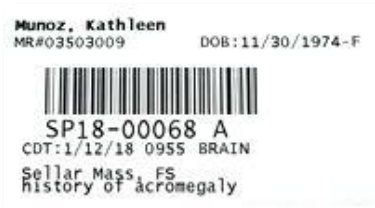
When you check in non-frozen specimens, the Beaker specimen label will not print automatically when you accession the case. To print a AP Specimen label:

- In Case Builder, click on the  **Actions** button and choose **Labels and Docs**. (Alternatively, you can personalize your Case Builder tool bar to have the Labels and Docs as a button).
- Select “**Label**” for the Document type:.
- Click on the **Print New** option.
- Choose “**OHSULAB AP Specimen Label**” by clicking on the magnifying glass next to the Print New Field.

- Select your workstation printer for the Printer field.
- Select “**1 per Specimen**” for the Copies field. Note: if you leave it on one per container, you will print a lot of erroneous extra labels!
- In the Specimen field, choose the specimen you want to print. The settings should look like the following:

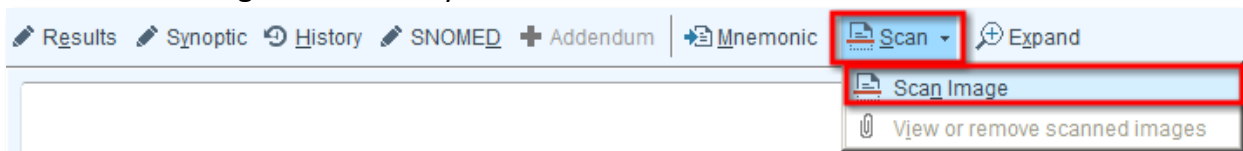


- Click the **Print** button. The label should look like this:

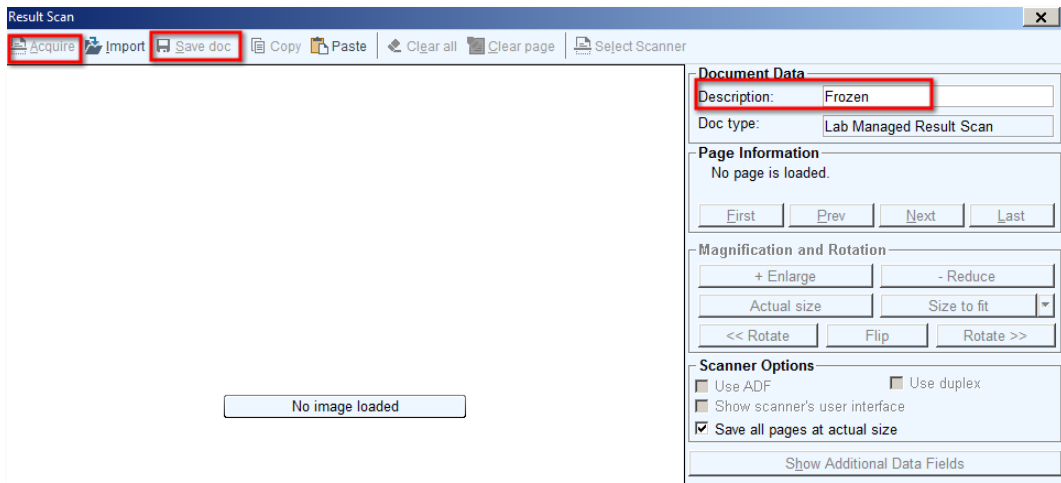


Scanning Frozen Paperwork into Case Results:

- Open the case in **Case Results** by scanning a barcode label while viewing the **Outstanding List**. To scan in any documentation into the case, click on the **Scan** icon on the middle toolbar of **Case Results**, and choose “**Scan Image**”. Make sure you are on a workstation with a scanner attached to it.



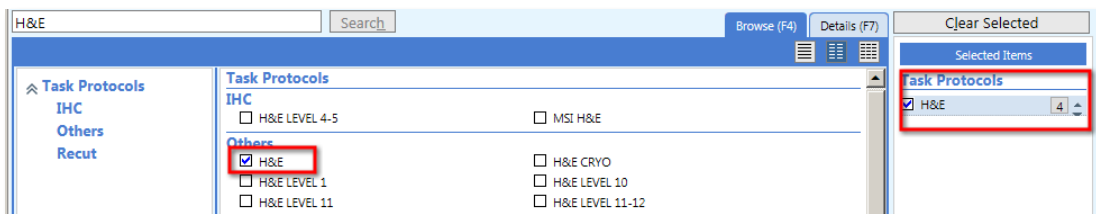
- Type in some descriptive text in the Description field. Ex. “Frozen”
- Click on the “**Acquire**” button. After the document has been scanned in, you should see the scan in the scan window. Click the **Save Doc** button when you are ready to accept the scan.



Appendix: Adding Extra Tasks and Reprinting Labels

Adding Tasks:

1. When you add specimens, certain default tasks will populate the bottom table. **Please check to make sure those tasks are correct!** If you have multiple specimens, click on each specimen's protocol row and the tasks associated with that specific specimen will show in the table below.
2. **To add more tasks:** Select the specimen or block that needs additional stains or tasks. In the **Add Task** field, search for the task protocol you want to add. Type part of the name and press Enter to narrow down the choices of tasks. This will bring up a Task Protocol Browser window and you can check off the tasks you want to add.
 - a. If you would like to request Flow Cytometry on your specimen, type in **"flow"** in the Add Task field. Check off the task **"Flow Cytometry Needed"**. This will add the task "Flow Cytometry Requested" in the task list. This task requires a task note to let Flow know what you would like them to perform. See next section about adding Task notes.
 - b. If you would like to order a flow sort on the case, type in **"flow"** in the Add Task field. Check off the task **"FLOW SORT"**. This will add the task "Flow Sort" in the task list. This task requires a task note to let Flow know what you would like them to perform. See next section about adding Task notes. Ex. "MRD Sort for FISH, IGH rearrangement"
 - c. If you would like multiple copies of the same slide or test, after you choose a test in the task protocol browser, you can use the up and down arrows to increment the number of slides/tests requested.



Deleting Items:

If the case hasn't yet been accepted, deleting an item completely removes it from the case. If the case has already been accepted, the deleted item appears with a line through it to indicate that it doesn't need to be processed or performed and that charges won't be filed for it.



To see deleted tasks, click **Show Deleted** under the  Actions button drop down list. If you deleted an item in error, select it and click **Restore**.

Adding Task Notes:

Sometimes you need to add a note to a task to add extra information. For example, if you order "Flow Cytometry Needed" or a "Flow Sort", the Flow techs need additional information to process the test.

1. To add a task note, the easiest way is to find the task in the Task list that you want to add a task note, and click on the grey field under the column **Task Note** for that row.

ID	C	Task (Alt+2)	Slides	Code	Qty	Task Flags	Task Note
A1.16	✓	Giemsa May Grunwald	1				
A1	✓	cKIT D816 for Mastocytosis					
A1	✓	Flow Cytometry Requested					
A1.17	✓	Cytospin (Flow)	1				
A1.18	✓	Cytospin (Flow)	1				
A1.19	✓	Flow Label	1				
A1.20	✓	Flow Label	1				
A1.21	✓	Flow Label	1				
A1.22	✓	Flow Label	1				

2. It will bring up the **Case Info** window. Type in the note you want to add for that particular task. Click the **Accept** button.

Case HML17-00169

1. Case 2. Specimen 3. Task

Task:

12	A1	Slide, Unstained
13	A1	Slide, Unstained
14	A1	Giemsa May Grunwald
15	A1	Giemsa May Grunwald
16	A1	Giemsa May Grunwald
17	A1	Giemsa May Grunwald
18	A1	cKIT D816 for Mastocytosis
19	A1	Flow Cytometry Requested

Flags:

Notes:

Rule out lymphoma

Apply this flag: To this type of task: Apply

Accept Cancel

3. In Case Builder, you will see the task note listed.

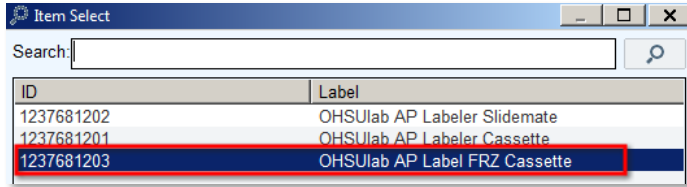
ID	C	Task (Alt+2)	Slides	Code	Qty	Task Flags	Task Note
A1	✓	cKIT D816 for Mastocytosis					
A1	✓	Flow Cytometry Requested					Rule out lymphoma
A1.17	✓	Cytospin (Flow)	1				
A1.18	✓	Cytospin (Flow)	1				
A1.19	✓	Flow Label	1				
A1.20	✓	Flow Label	1				
A1.21	✓	Flow Label	1				
A1.22	✓	Flow Label	1				

Reprinting Frozen Cassettes:

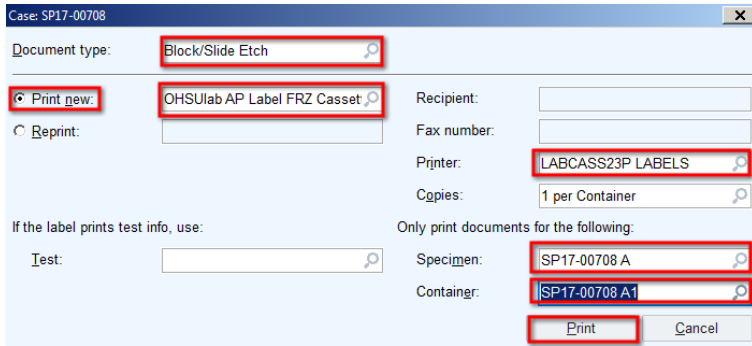
If you have to reprint a frozen specimen cassette:

1. In Case Builder, click on the **Actions** button and choose **Labels and Docs**. (Alternatively, you can personalize your Case Builder tool bar to have the Labels and Docs as a button).
2. Select **"Block/Slide Etch"** for the Document type:.
3. Click on the **Print New** option.

4. Choose “OHSUlab AP Label FRZ Cassette” by clicking on the magnifying glass next to the Print New Field.



5. Select your workstation printer for the Printer field.
6. Select “1 per Container” for the Copies field.
7. In the Specimen field, choose the specimen you want to print.
8. In the Container field, choose the frozen block you are trying to reprint.

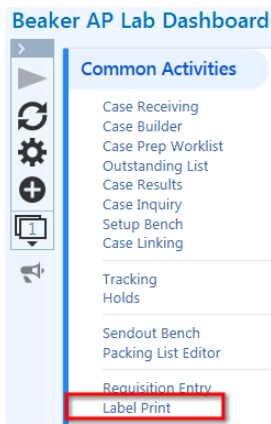


9. Press the **Print** button.

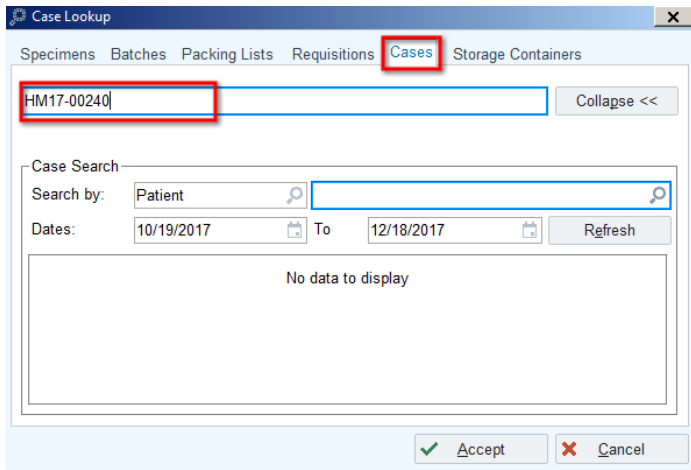
Reprinting Slide Labels:

If you need more slide labels or need to reprint existing labels, you can use the **Labels and Docs** activity to print additional slide labels.

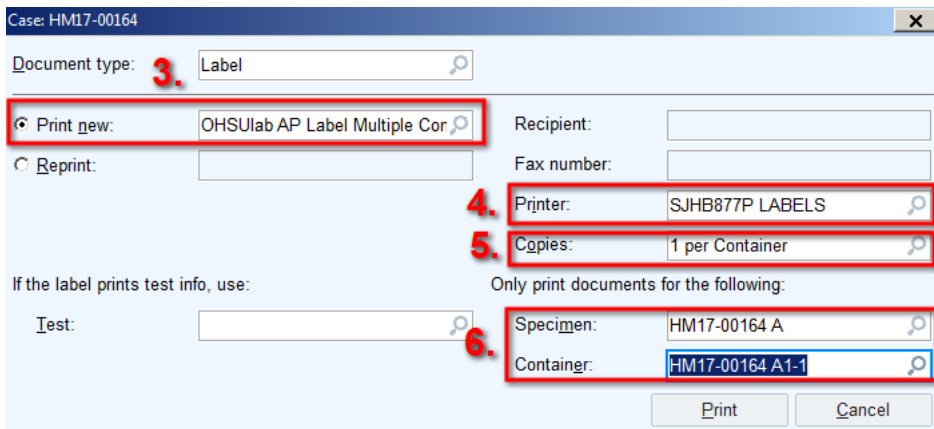
1. Click on the **Label Print** link on your Beaker AP Lab Dashboard.



- Click on the **Cases** tab. Type in the case number manually. Click the **Accept** button.



- Choose **Print New** and click on the magnifying glass to select “OHSUlab AP Label Multiple Containers per row”. (If Print New is grayed out, then choose Reprint with the same setting.)



- Choose the appropriate printer for your workstation from the list.
- In the Copies field, choose “**1 per Container**”
- Choose the **Specimen** (if there are multiple specimens). In the **Container** field, choose the slide you want to print.
- Click on the **Print** button.

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