Epic Update

Base Deck, December 2016
Epic Project Guiding Principles

Enable UMMHC’s 2020 Vision
- Partner with UMMS to build an IT system that integrates all available clinical data, is fast, dependable, secure and easy to use from a mobile platform
- Patient and provider-centric integrated EHR

- UMMHC’s Clinical, Operational & Financial Team Members will Design Workflows & Content
  - Quality- & Outcomes-Driven
  - Patient Experience & Engagement
- Enterprisewide Integration to Maximize Workflow Efficiency
- Convert Appropriate Amount of Historical Data into Epic
- Facilitate Exchange of Health Information
- Implement Epic’s Foundation System and Best Practices
- Users will be Trained & Demonstrate Proficiency to Earn Epic Access
- Enable Clinical and Translational Research, Education and Quality Improvement
- Establish Effective and Transparent Communications
- Infrastructure with High Availability and Stability
Epic Project Implementation Timeline
Major Milestones, Phases 1-3

2015
- Q1: Soarian Exit Strategy Selection
- Q2: Project Plan Development

2016
- Q1: v.2015 Installed
- Q2: Workflow Build Done
- Q3: Content Done
- Q4: Test Issues Fixed

2017
- Q4: Phase 1 Go-Live

2018
- Q1: Transition to Support & Optimization

Phase 1: UMMMC, UMMMG, Clinton, Marlborough, HealthAlliance, Academic EMR, UMMS CDR Interface, ACO Modules
- Design, Build, Validate: 1/1 Plan Done, Begin Design, 3/1 Design Done, Begin Build & Workflow Adoption
- Integration Testing Cycles: 9/2 Build & Workflow Adoption Done, Begin Testing, 2/28 Infrastructure Ready, 6/30 Testing Done, 8/1 Begin User Training
- Stabilize: 1/1
- Optimization: TBD

Phase 2: Community Healthlink
- TBD

Phase 3: Affiliates
- TBD

We’re Here!
# Testing Epic Underway

<table>
<thead>
<tr>
<th>TYPE OF TESTING</th>
<th>TIMING</th>
</tr>
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</table>
| Application                             | Round 1: COMPLETE  
Round 2: COMPLETE  
Round 3: November 28 – December 16  
Round 4: January 2 – 20, 2017          |
| Mapped Record                           | October 24, 2016 – February 10, 2017                                  |
| Integrated                              | January 30 – June 23, 2017                                           |
| Parallel Revenue Cycle Testing (PRCT)   | April 17 – June 30, 2017                                              |
| End-User Acceptance Testing (EUAT)      | EUAT Application Testing: March 6 – 10, 2017  
EUAT Integrated Testing: May 8 – June 23, 2017 |
Transformation Readiness

- Department leaders completed **baseline** readiness self-assessments to determine their department’s level of readiness across various Epic-related measures
  
  - Assessments will help departments/clinics/practices prepare for our Epic go-live
  
  - Closely monitored by Entity Leads
  
  - Readiness scores of each individual department determine the state of readiness of UMass Memorial as a whole
Readiness Assessment Timeline

- **March 2016**: Introduce Transformation Readiness Program
- **Sep - Oct 2016**: Readiness Kickoffs
- **Jan 2017**: Readiness Assessment #1
- **June 2017**: Readiness Assessment #2
- **July 2017**: Readiness Assessment #3
- **Aug 2017**: Readiness Assessment #4
- **Sept 2017**: Final Assessment
- **Oct 2017**: Go Live

**Next Survey**: 1/23/17

**Readiness Target Expectations**:
- 0%
- 25%
- 50%
- 75%
- 90%
- 100%

= Complete!
Transformation Readiness

UMass Memorial Health Care System

Entity Lead:
Dr Dickson

Legend

On Target
1 Milestone Behind
≥ 2 Milestones Behind

Training Ready Target
75%
50%
25%

UHMHC
Dickson, Eric MD

Clinton Hospital
Thorpe, Judith

Community Medical Group Offices
Corbett, Bill MD

Marlborough Hospital
Roach, Steve

Health Alliance Hospital
Dullea, Bob

Medical Center
Smith, Jeff MD

Population Health / ACO
Greenwood, John

Surveys

Department Results

Entity Results

Transformed Readiness Assessment #2
System Roll-Up
Entity Lead
Bob Dullea

Super Users

Communication Plan
Device Readiness
Downtime / Business Continuity

Future State
Workflow
Go-Live Plan
Policies
Practice Changes
Reporting / Forms
Security Access

Surveys
Department Results
Entity Results

Epic
ONE PATIENT, ONE RECORD, ONE LOGON.
# System Transformation Readiness Baseline

<table>
<thead>
<tr>
<th>System Roll-Up</th>
<th>Entity Lead</th>
<th>Percentage of Assessments Received</th>
<th>Go-Live Plan</th>
<th>Communication Plan</th>
<th>Device Readiness</th>
<th>Downtime / Business Continuity</th>
<th>Future State Workflow</th>
<th>Policies</th>
<th>Practice Changes</th>
<th>Reporting / Forms</th>
<th>Security Access</th>
<th>Super Users</th>
<th>Training</th>
<th>Charge Capture</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Dr. Eric Dickson</td>
<td>76%</td>
<td>Ready Target 0%</td>
<td>Ready Target 0%</td>
<td>Ready Target 25%</td>
<td>Ready Target 25%</td>
<td>Ready Target 0%</td>
<td>Ready Target 0%</td>
<td>Ready Target 0%</td>
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<td>Ready Target 0%</td>
<td>Ready Target 0%</td>
<td>Ready Target 0%</td>
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<tr>
<td></td>
<td>Sergio Melgar</td>
<td>91%</td>
<td>0%</td>
<td>25%</td>
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</tr>
<tr>
<td></td>
<td>Dr. Eric Dickson</td>
<td>94%</td>
<td>N/A</td>
<td>0%</td>
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<td>N/A</td>
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**Key**
- **Green** On Target
- **Yellow** 1 Milestone Behind
- **Red** ≥ 2 Milestones Behind

As of November 17
Ensuring data is readily available when we transition to Epic is critical.

This data will be thoroughly validated by providers and clinical staff via a series of Data Conversion Validation Sessions

**Who:** Enterprise Design Team members, Subject Matter Experts and Residents; however, any clinician is welcome

**When:** December 2016 through July 2017

**Where:** University Campus and 367 Plantation Street in Worcester

Want to participate? Email epicproject@umassmemorial.org.
Visit Epic Central’s Data & Applications page to see what data from current systems will be available in Epic.
<table>
<thead>
<tr>
<th>DATES</th>
<th>NUMBER OF WEEKS</th>
<th>TRAINING EVENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>December 1, 2016</td>
<td>Provider Registration Open</td>
<td>(Tables at select events – Quarterly MD meeting)</td>
</tr>
<tr>
<td>April 1, 2017</td>
<td></td>
<td>End User Registration Open (Tables at cafeterias, innovation celebration)</td>
</tr>
<tr>
<td>May 30 - June 17, 2017</td>
<td>3 weeks</td>
<td>Pilot Training (Credentialled Trainers and Super Users, SMEs and other interested parties, as scheduled per application)</td>
</tr>
<tr>
<td>June 19 - July 29, 2017</td>
<td>6 weeks</td>
<td>Credentialled Trainer Training</td>
</tr>
<tr>
<td>June 19 - July 29, 2017</td>
<td>6 weeks</td>
<td>Specialists Training Specialists (STS) Trainers Training; scheduled time intermittently with UMass Memorial PTs and Epic Installers, plus practice time</td>
</tr>
<tr>
<td>July 31 - August 12, 2017</td>
<td>2 weeks</td>
<td>Super User Training (Credentialled Trainers to be utilized 100% during this time; STS Trainers per training schedule for their application as needed )</td>
</tr>
<tr>
<td>August 14 – Sept. 23, 2017</td>
<td>6 weeks</td>
<td>End User Training (Credentialled Trainers to be utilized 100% during this time; STS Trainers per training schedule for their application). Physician Personalization Labs beginning 9/11 require CT and STS attendance, as scheduled</td>
</tr>
<tr>
<td>Sept. 11 – Sept. 30, 2017</td>
<td>3 weeks</td>
<td>Provider Personalization Labs (To be scheduled through HealthStream. Will be conducted as near provider as possible.) Consider extending two weeks post go-live.</td>
</tr>
<tr>
<td>Sept. 25 – Sept. 30, 2017</td>
<td>1 week</td>
<td>Refresher Sessions (Credentialled Trainers full time; STS, as scheduled)</td>
</tr>
<tr>
<td>October 2017</td>
<td>4 weeks</td>
<td>Post-live and new hire training</td>
</tr>
</tbody>
</table>
Provider Training Communications

- Provider training registration started on December 1, 2016
- Provider = physicians, residents*, nurse practitioners and physician assistants
- Mailing to provider homes
  - 8.5 x 11 cover letter from Drs. Tosi, Alper, Corbett, O’Leary and Sioufi
  - 8.5 x 11 double-sided one-pager with need-to-know training details
  - Large orange envelope

*Residents will not register for training themselves and therefore will not be included in the mailing.
Provider Training Mailing

IMPORTANT: ACTION REQUIRED

UMass Memorial Health Care
Department of Medical Staff Services
281 Linwood Street, Suite 212
Worcester, MA 01605

November 2016

Dear Colleague,

UMass Memorial Health Care’s (UMMHC) new electronic health record, Epic, is scheduled to go live on December 1, 2016. The transition will involve the entire UMMHC community, including medical staff and staff from all locations. We will be providing training for all individuals who will be accessing Epic, including those who will be working with Epic on a daily basis.

For our patients, this means that we will be able to provide better care and more accurate information about their medical history. The transition will begin with a national rollout of the Epic system, followed by a custom training program for UMMHC staff.

We are committed to providing the best possible training for our medical staff and patients. We will be offering a variety of training options, including classroom training, online resources, and one-on-one coaching.

Thank you for your continued support.

Sincerely,

Dr. Smith
Chief Medical Officer

UMass Memorial Health Care
Department of Medical Staff Services
281 Linwood Street, Suite 212
Worcester, MA 01605

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Epic Provider Training

Our Epic Implementation

As part of our mission to become one of the top 10 academic healthcare systems in the country, UMass Memorial Health Care (UMMHC) is implementing Epic, an integrated electronic health record system. Epic will replace many of UMMHC’s current and legacy-related applications.

The Epic implementation will begin on December 1, 2016. We encourage you to participate in the transition to Epic by attending training sessions and becoming familiar with the new system. You will be provided with a schedule of training sessions, which will be available on our website.

We appreciate your commitment to providing the highest quality care to our patients. We are committed to helping you succeed in the transition to Epic.

Thank you for your continued support.

Sincerely,

Dr. Johnson
Chief Medical Officer

Epic Provider Training

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Important: Action Required

Provider Training Overview

Epic Implementation

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Thank you for your continued support.

Sincerely,

Dr. Johnson
Chief Medical Officer

Keep in Mind

- **9/2 Freeze Reminder**
  As of **September 2, 2016** and running through June 2017, no updates or changes can be made to applications that interface with Epic. Exceptions do apply. Visit [Epic Central](#) to learn more.

- **Vacation Mindfulness**
  Please be mindful of taking considerable time away (weeks at a time) between August and September 2017. During this time, providers and staff will be required to attend Epic training one or more days, depending on the individual’s role.
New On Epic Central

The new **IS Projects** section features a growing list of pages, including Technical Readiness, Email Migration, One Logon and FollowMe Desktop.
Regular Communications

- **Epic Talking Points**

- **Information Services Talking Points**
Regular Epic Communications

- Epic Insight for Leaders

- Epic Insight for Providers
Questions?

Send questions, comments, concerns to epicproject@umassmemorial.org.