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Notes on the Epic transition



March 2020

As you look at your PTO usage for this year, remember we have system-wide PTO blackouts related to the Epic go-live which potentially affect all team members – clinical, non-clinical, in Epic-live facilities, as well as those preparing to go live. These blackout periods are extremely important as Epic emphasizes that having all hands on deck is crucial to the success of the deployment.

Here are the blackout periods:

If you work in ambulatory facilities going live with Epic – No PTO will be approved for June 1-19, 2020.

If you work in acute care/inpatient departments going live with Epic or already live with Epic – No PTO will be approved for Oct. 1-23, 2020.

Corporate team members will be required to observe at least one of these blackout periods. Managers should discuss the blackout periods with their teams to determine which time frame would be most effective for their teams to be on hand.

Team members in several other departments will need to be available during both go-lives. Ballad Health leadership will communicate directly with those teams.

PTO usage

The extension of PTO usage through December 2020 (as opposed to the previously set Sept. 30 deadline) will apply to all team members.

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Buzzwords

- **ADT/Grand Central:** Epic application that deals with hospital admitting, discharge and transfer.
- **Cadence:** The Epic application that relates to scheduling.
- **End User Acceptance Testing (EUAT):** The process in which team members/providers review the Epic system to ensure that current workflows built in the system meet clinical needs. Participants provide input to the analysts and trainers regarding build, configuration, aesthetics or other improvement ideas.
- **HealthStream:** The website at which providers will receive online Epic training.
- **Pilot Training:** Sample user group participants provide feedback on content, delivery, learning activities, course materials and the training environment. The feedback is then incorporated into the course curricula and modifications are made to the training environments as applicable.
- **Specialist Trainers:** Ballad Health physicians and/or nurse practitioners that currently use the Epic EHR system who will provide Epic EHR training to colleagues in their areas of expertise. These professionals “pay it forward” by sharing information that assist their colleagues in developing EHR best practices.

Progress notes

Providers

The Provider and Clinical Readiness Teams, patient safety, reporting and other teams are collaborating to delineate high-risk workflows and associated mitigation strategies. These workflows will be monitored during the go-live period to ensure they are being adopted and expected outcomes are being met. Epic trainers from Wisconsin have been training Ballad Health providers on-site for their role as Specialist Trainers.

Additional workflow walkthroughs are planned for behavioral health, Neonatal Intensive Care Unit (NICU) and pediatrics. In these sessions, the Epic team will show how a patient encounter will flow from the ED (or direct admit) to inpatient care through to discharge. For the NICU, the session will show a patient encounter from birth (or transport) into NICU to discharge. We plan to address workflows for various roles including (as appropriate) provider, nurse, respiratory therapy, rehab therapy, child life, therapist and pharmacy workflows. Invites will be extended for these sessions soon.

The sessions are scheduled as follows:

Pediatrics – March 24, Tuesday, 1-3 p.m.

NICU – March 24, Tuesday, 3:15-5 p.m.

Behavioral health – March 25, Wednesday, 1-4 p.m.

Ambulatory providers at non-Epic-live sites: Click [here](#) for information about patient data conversion from Allscripts to Epic.

ARC insight

Access & revenue cycle

One of the five guiding principles of the Big Ballad project is: We are all accountable for the project's success. This means that strong interdisciplinary teams are needed; teams that include representation from clinical care providers, operations and information technology. Everyone has an important role!

With the integration features of Epic, this guiding principle is especially applicable to the Access & Revenue Cycle. In fact, one of the most important cornerstones to a healthy revenue cycle is engagement from everyone, including the patient, from the time the patient and guarantor records are created, throughout their appointment and clinical care, to providing an accurate, timely bill.

A healthy revenue cycle is like a game of dominoes: Each piece has a purpose, and if they're not properly aligned, they won't make it to the end. The first group of dominoes is registration and scheduling – building complete and accurate patient and guarantor records, including insurance coverage, creating the momentum needed to make it to the second group: clinical patient care. Oftentimes, this can be complex and have multiple paths, including surgical services or a series of follow-up visits. Whatever the path(s) might be, comprehensive documentation needs to be completed to keep the momentum flowing into the final group, which is billing.

Vital signs

Clinical team members

October go-live

Additional workflow walkthroughs are planned for behavioral health, Neonatal Intensive Care Unit (NICU) and pediatrics. In these sessions, the Epic team will show how a patient encounter will flow from the ED (or direct admit) to inpatient care through to discharge. For the NICU, the session will show a patient encounter from birth (or transport) into NICU to discharge. We plan to address workflows for various roles including (as appropriate) provider, nurse, respiratory therapy, rehab therapy, child life, therapist and pharmacy workflows. Invites will be extended for these sessions soon.

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Epic veteran updates

Current Epic users

The following table lists select features that will be available with the enhancements and upgrade going live on March 11, 2020. Additional information will be shared as we near that date.

Feature	Description	Departments/services impacted
Storyboard: Cardiology users	The Cupid storyboard is being streamlined to limit duplicative information; e.g., removing items that are also available as icons such as “Fall Risk.”	Cardiology
Behavioral health module	Patient treatment plans and group documentation are supported with new functionality available in the behavioral health module. Outpatient departments will begin using the behavioral health module functionality on March 12. Inpatient departments will begin using the group documentaion only on March 12. Inpatient use of treatment plans will be phased in at a later time (date TBD).	Behavioral health users in inpatient and outpatient departments
Wound care module	Wound care documentation, tracking and reporting is enhanced with new functionality available in the wound care module.	Wound nurses and providers in IP and hospital outpatient departments
Lactation documentation	Lactation documentation will now be supported in Epic.	Lactation nurses/clinicians, providers
Excuse section	“Excuses” section of the disposition activity is enhanced with new and easier-to-use functionality.	Emergency Department providers/clinicians
Triage banners	Banners will be available to help ED providers understand a patient’s opioid and benzodiazepine history.	Emergency Department providers
Neurotech tools	Neurotechs at HVMC and BRMC will have new tools to more efficiently schedule and document.	Neurotechs

Feature	Description	Departments/services impacted
Admit, transfer and DC orders	Orders will not auto-complete. This will allow the provider to modify the orders if changes are needed prior to the patient physically moving.	Providers
Storyboard: Radiology users	Storyboard for various radiology roles enhanced: <ul style="list-style-type: none"> • Radiologists can see relevant procedure information in the radiologist storyboard when in the imaging workspaces. • Technologists performing imaging exams have imaging-specific information at their fingertips with the technologist storyboard. • Nurses who document procedure details for interventional radiology procedures can quickly see the important procedure and patient information most relevant to them. 	Radiologists, technologists and IR nurses
Emergency trauma button	A one-click option that will auto-create a case and open the log with simple patient information, speeding up the ability for the OR to document in emergency situations.	OR schedulers, periop nurses

All aboard!

Education & training

Questions about Epic training? Email epictraining@balladhealth.org

June 1, 2020 go-live:

Big kudos to all ambulatory leaders who have actively signed up team members under their span of control for the Epic training classes in the HealthStream system. As of publication of this newsletter, 78% of Ballad Health's ambulatory team members are registered for Epic training classes. Seventy-one percent of the providers are registered for Epic training and 48% of the providers are registered for "Personalization" sessions. Keep up the good work, and let's move the goal to 100%!

Important dates for June 1 go-live:

March 20: Credentialing for trainers for the June 1 go-live completed.

March 23 - May 19: Role-specific training occurs. Super Users should be the first to attend session offerings between March 23 - April 3.

May 20 - May 29: LEAP Labs, Super User Go-Live Readiness meetings and provider personalization labs

Oct. 1, 2020 go-live:

Training and Access Readiness with User Validation sessions begin March 30, 2020. Leaders will be assigned the appropriate service area-specific course in HealthStream by March 9. This will trigger an email notification from HealthStream of this assignment to prompt leaders to log in to HealthStream and register for a session. Be sure to type the entire course title when searching for available sessions to complete registration so you are sure to get in the right service area course with your peers.

It is extremely important that leaders attend one of these sessions. Leaders will work with analysts, trainers and HealthStream subject matter experts to ensure they correctly identify role-based training needs for each team member under their span of control. In addition, leaders will be asked to confirm additional roles and responsibilities that their team members are assigned as applicable. For example, a med/surg nurse may also work in the Emergency Department. That requires different courses to be assigned and additional access.

Important dates for Oct. 1 go-live:

May 4: Epic training courses will open in HealthStream.

May 18: EUAT and Pilot Training begins.

May 18: Surgery preference card build begins.

July 27 - Sept. 18: Role-specific training occurs. Super Users should be the first to attend session offerings

between July 27 – Aug. 7.

Sept. 21 – Sept. 29: LEAP Labs, Super User Go-Live Readiness meetings and provider personalization labs

Oct. 1: Go-live

Super Users' spot

June go-live

March 23: Super Users in Epic-live clinics and billing offices will be assigned the “Epic Super User Go-Live Readiness” course in HealthStream to help you prepare for your go-live support role. This is an hour-long course; you can attend in person at the location indicated in HealthStream or via Webex.

After March 23: If you believe you should have been assigned the above-referenced course in HealthStream but do not see it, please email us at epictraining@balladhealth.org.

Clarification on Super Users REPEATING courses:

Super Users should repeat role-specific Epic courses for the roles that will be supported as a Super User.

Note:

- These role-specific courses do not have “Super User” in the title in HealthStream since the content is the same regardless of who attends.
- Courses that do contain “Super User” in the title are the Orientation and Go-Live Readiness meetings, and they should not be repeated as they are not role-specific.
- To request a seat reservation for Super User repeat attendance, email epictraining@balladhealth.org; HealthStream does not allow registration to more than one session of the same course.

Register Super Users for their training before the rest of your team members in the earliest available sessions. Anyone, including non-Super Users, may attend those early sessions to broaden options for getting everyone registered.



Each month, we feature Ballad Health teams and team members who have a direct impact on the Epic implementation.



Brad Price, Chief Integration Officer

Q: How would you describe your job in two sentences?

A: Ballad Health has brought together two excellent organizations. My role is to help identify and bring forward the best practices of both organizations.

Q: You have become the face of Ballad Health's Epic launch. What have you learned in the process of this implementation?

A: We truly should have a collage of hundreds of people's pictures. Our IT, operations and leadership team have invested a tremendous amount of time and effort to come together for the benefit of our patients and build a strong culture within Ballad Health.

Q: Describe what goes on behind the scenes of the Epic rollout.

A: I would probably best describe the Epic project as a snowball rolling downhill. It starts small when the system is being built, continues to build in size as testing begins, then we see it really become large as training occurs. The project grows to full size as go-live happens. There are so many pieces that come together to ensure success, and the team is doing a great job preparing Ballad Health for just that.

Q: When it comes to Epic, a lot of acronyms are used. What are one or two important acronyms you think all team members should know?

A: Workflow Walkthrough (WFWT) is where most end users see the system for the first time. It allows them to see how the system works and what their work experience will be. Second would be Technical Dress Rehearsal (TDR). This is a critical piece to ensure the hardware and software come together for success at go-live. We work with end users to make sure devices, printers and many other hardware pieces are functioning properly.

Q: What accomplishment or milestone have you been most proud of related to Epic, and why?

A: Ballad Health is a young organization and has had a significant amount of change and integration to accomplish. Seeing everyone come together to achieve the success we have is amazing. This leads us to what I know will be a successful Epic go-live.

Q: What is the best part of your job?

A: Working with so many different teams and sensing the passion and enthusiasm they bring to improve care for our patients and making Ballad Health the best it can be.

Be sure to visit the [Epic intranet](#) site for announcements and past newsletters!

Epic Fun fact

Epic and its CEO, Judy Faulkner, were featured on "CBS Sunday Morning" on Feb. 23. Click [here](#) to watch!

Note: This video may not work through Internet Explorer; if possible, view using another browser such as Google Chrome or Mozilla.