ESSENTIAL ROLE OF OPS READINESS:

Implementing a new EHR is a complex undertaking for any healthcare organization, but for a 21-hospital system with hundreds of ambulatory locations operating on multiple technologies, "complex" doesn't even begin to describe the journey that lies ahead.

The process of implementing a fully integrated, enterprise-wide technology, let alone preparing thousands of staff members for new roles and new ways of working is difficult to conceive and prepare for. An experienced partner, one who understands successful implementation is not "just about the technology," can mean the difference between success and failure. Ensuring operations is ready for the new roles and processes is essential.

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visit www.impact-advisors.com or call 800-680-7570

Program Assurance for a Complex EHR Implementation

In late 2020, Impact Advisors began helping a $5.9B academic health system prepare for its impending implementation of Epic.

The nearly full-suite platform would be deployed across the organization's integrated network of 21 hospitals, more than 50 health centers and outpatient facilities, and over 200 physician office locations—one of the largest Epic rollouts to date. The system would replace several legacy applications and integrate with hundreds of third-party applications and systems currently in use within the organization's clinical, revenue cycle, and other operational areas.

The organization chose Impact Advisors as its advisory partner to support its pre-implementation planning and implementation deployment teams. In this role, Impact Advisors would provide guidance, program assurance leadership, Epic system expertise, and clinical and revenue cycle operational engagement expertise. **The objective was to help the organization address the "people and process" components that are critical to achieving operational value from its information technology investment.**

Pre-Implementation Planning

Prior to the Epic deployment team arriving on scene, Impact Advisors provided guidance and facilitation for several critical pre-implementation planning components:

- **Governance and Decision-Making:** Comprised of the Executive Steering Committee (ESC), project leadership, project workgroups, and ad hoc advisory groups, program governance is the management framework through which critical decisions are made, issues are addressed, and the project is kept "on track." In addition to facilitating the creation and operation of these groups, Impact Advisors assessed staff readiness and engagement, identified project sponsors and physician leaders,

helped define policy changes required to achieve Epic utilization goals, and clarified resource availability to work on project tasks.

- **Benefits Validation and Tracking:** Impact Advisors worked with client leadership and stakeholders to validate and refine its list of benefits expected as a result of or achievable through the implementation of Epic and establish governance structures to ensure identified benefits are captured, tracked, and measured.

- **Validation of the Epic Cost Model:** Impact Advisors evaluated the organization's implementation cost model and made adjustment recommendations for often-overlooked costs and savings opportunities. The team also reviewed the project and post-live staffing models and made recommendations.

- **Provider Training:** Early on during planning, Impact Advisors validated the client's training approach and strategy and facilitated the launch of change management activities.

- **Key Epic Decisions:** Impact Advisors also used the planning runway to guide organizational leadership through early Epic considerations and decisions, including service changes, content standardization, vendor alignment, and third-party initiatives.

- **Third-party Applications / Contracting:** Impact Advisors helped the organization identify and validate the scope of third-party applications that would need to be integrated with Epic, a significant and often underestimated effort.

Most of the pre-implementation planning activities took place in the six months prior to the official kick-off scheduled by Epic in October of 2021, establishing a firm foundation of the vital resources (people, time, and money) necessary for program success. Impact Advisors' assigned program director, project managers, and team leads played instrumental roles in overall project planning.

Implementation

Epic, as the deployment partner, focused on leading the client's IT team through its standard and robust implementation methodology. As the strategic advisor, Impact Advisors was tasked with ensuring the implementation was successful – that is: **the delivered system design would meet operational needs and that the operations teams (Clinical and Revenue Cycle) were prepared for the changes to come.** To that end, Impact Advisors provided leadership, guidance, or support as needed to add value primarily from the perspective of aligning the organization's people and process with the enabling technology.

Executive Leadership

Impact Advisors provided executive-level guidance and coaching on methodology, clinical and revenue cycle operations, benefits attainment, and best practices. On the outset, the team worked with the ESC and program leadership to confirm project scope and the overall timeline and finalize the integrated project plan. They also continued to support program governance by participating in ESC and advisory group meetings, providing tools, templates and best practice insights on scope management, status reporting, and risk management.

From a benefits oversight perspective, Impact Advisors confirmed benefits owners and measurement tactics by initiative, mapped out data requirements for monthly tracking and responsible parties for pulling data, and monitored progress.

Operational Engagement

During any major technology implementation, operational leadership takes on many extra tasks that must be completed on top of their normal workload. Impact Advisors worked directly with operations leadership to prepare their client counterparts
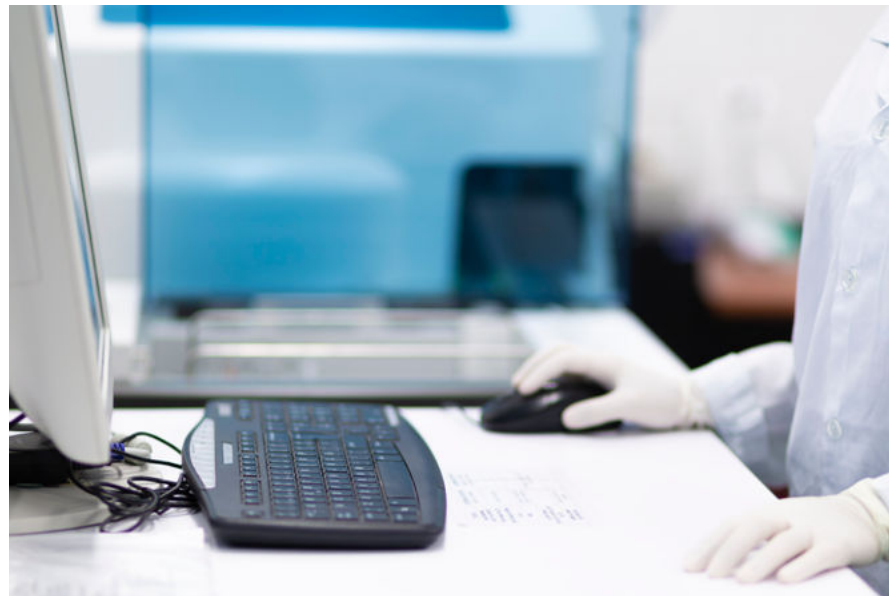
to be successful with the new system by helping them and their teams understand the ways their operational workflows and responsibilities would change and the enhancements that could be achieved through the technology. Impact Advisors set up and attended meetings at clinics, shared reports, performed due diligence, sat with operational workgroups, prepared leaders for ESC and advisory group meetings, and served generally as trusted advisors.

Impact Advisors also assisted with the development and execution of a change management and engagement strategy for the broader operational teams, including a program communication plan. This involved implementing risk mitigation approaches where necessary, educating end users, facilitating the selection of appropriate third parties that would need to be integrated into Epic, conducting current state workflow analysis, preparing staff for and setting expectations for validation

sessions, and providing context and support for key decisions related to Epic application build.

In collaboration with operational leadership, the team confirmed the training strategy, developed the training plan and content, and oversaw the training of Credentialed Trainers, completion of competence testing, and user access provisioning. Finally, the team worked with Epic to conduct go-live readiness assessments at 120, 90, 60, and 30 days out and to create and oversee the execution of the cutover plan.

Two-in-the-Box Leadership & PMO Support

In addition to an implementation program director, Impact Advisors provided two-in-the-box leadership (e.g., Access/Rev Cycle PM, Ambulatory PM, Technical PM) and support for the client's Project Management Office (PMO). The role of these advisors was to share with their team lead counterparts best practice approaches leveraging expertise from past implementations,

provide critical context and help translate and adapt Epic methodology and options – particularly related to legacy and third-party applications. Like the operational engagement advisors, they served as coaches, sounding boards, project managers, and "doers," filling roles not otherwise supported by the client's PMO.

Led by the program director, the PM leaders were tasked with ensuring all build activities were tracked, milestones met or escalated, and the client's change control policies were adhered to. They also confirmed the infrastructure and environment management strategy and alignment with Epic requirements, assisted with development of data conversion and integration strategies, developed testing plans, and oversaw execution of all testing and the data conversion plan as well as remediation. These leaders also developed and oversaw execution of the workflow dress rehearsal, and coordinated the go-live Command Center, front-line user support, and issue management.

Our Impact

The client successfully took 150 primary care clinics live in Wave 1 and over 400 specialty clinics and 16 hospitals in Wave 2. Six months post-live, the Epic system was stable and already enabling clinical and operational efficiencies tied to bottom-line savings and improving patient care. For example, one tech-enabled workflow change was aimed at decreasing the backlog of open encounters. Impact Advisors customized an Epic report that tracked a 38% decrease in open encounters amounting to $330K in charge capture—although this improvement was as much about improving the quality and completeness of the patient record as it was about revenue.

Overall, Impact Advisors' involvement in the implementation contributed to:

• Better adoption to fully leverage the Epic system and derive its promised value

• Increased employee satisfaction (and retention) by removing stress and facilitating a smooth transition

• Workflow standardization across all clinics, which makes staff moves among the facilities easier

• Improved patient satisfaction and outcomes by helping ensure patient care remained at the center of all efforts

Key Lessons Learned

Every implementation is unique and affords opportunities to develop new approaches and tools. This engagement proved the importance of clearly setting expectations early and often, providing timelines, listening, being transparent, providing the "why" behind process changes, having difficult conversations when needed, and aligning policy with practice. ∎