EpicTogether
Columbia Town Hall

Timothy Crimmins, MD – ColumbiaDoctors CMIO

Rosalie Long – ColumbiaDoctors COO

Ginu John – Director, EpicTogether Training

Jonathan Mason – Program Manager, EpicTogether

EpicTogether Executive Sponsors

November 7, 2018

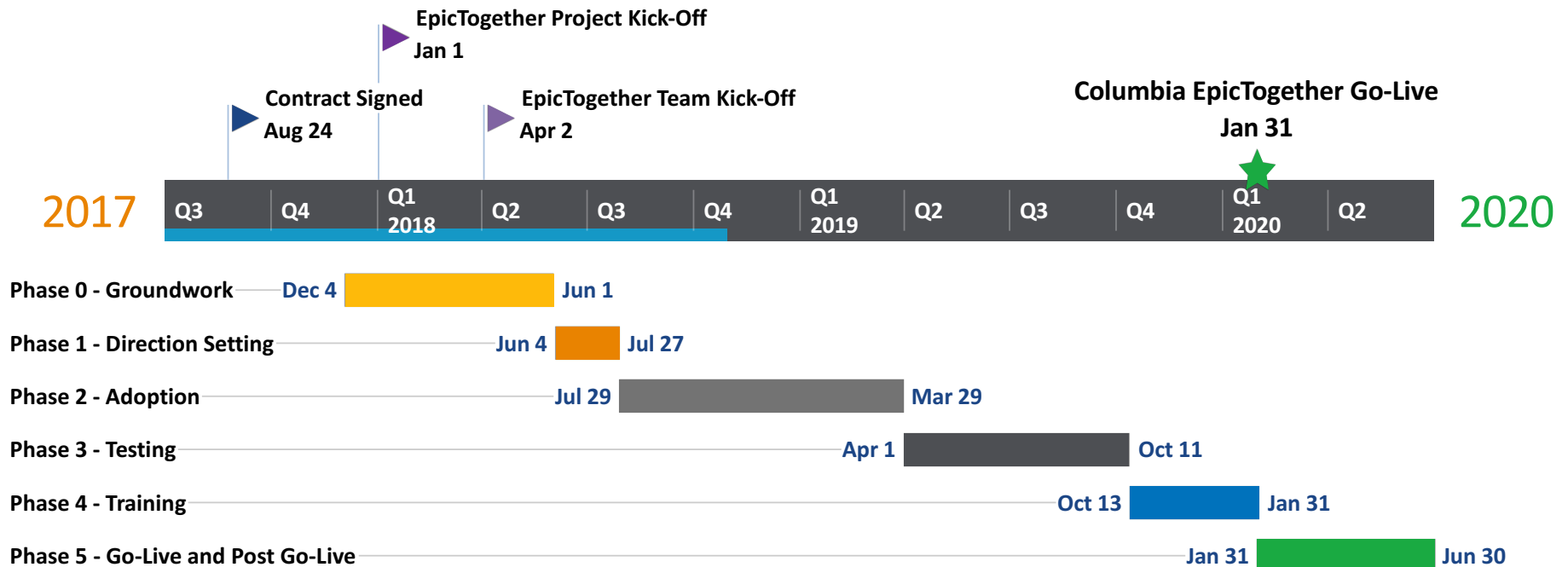**ColumbiaDoctors**
The Physicians and Surgeons of Columbia University

Agenda

- **EpicTogether Project Update**

- **Operational Readiness/Change Management**

- **EpicTogether Training**

- **Next Steps**

ColumbiaDoctors
The Physicians and Surgeons of Columbia University

Guiding Principles

- **We will put our patients first.**

- **We are all accountable for our success.**

- **We will work together to standardize workflow and content.**

- **We will adopt the Foundation System.**
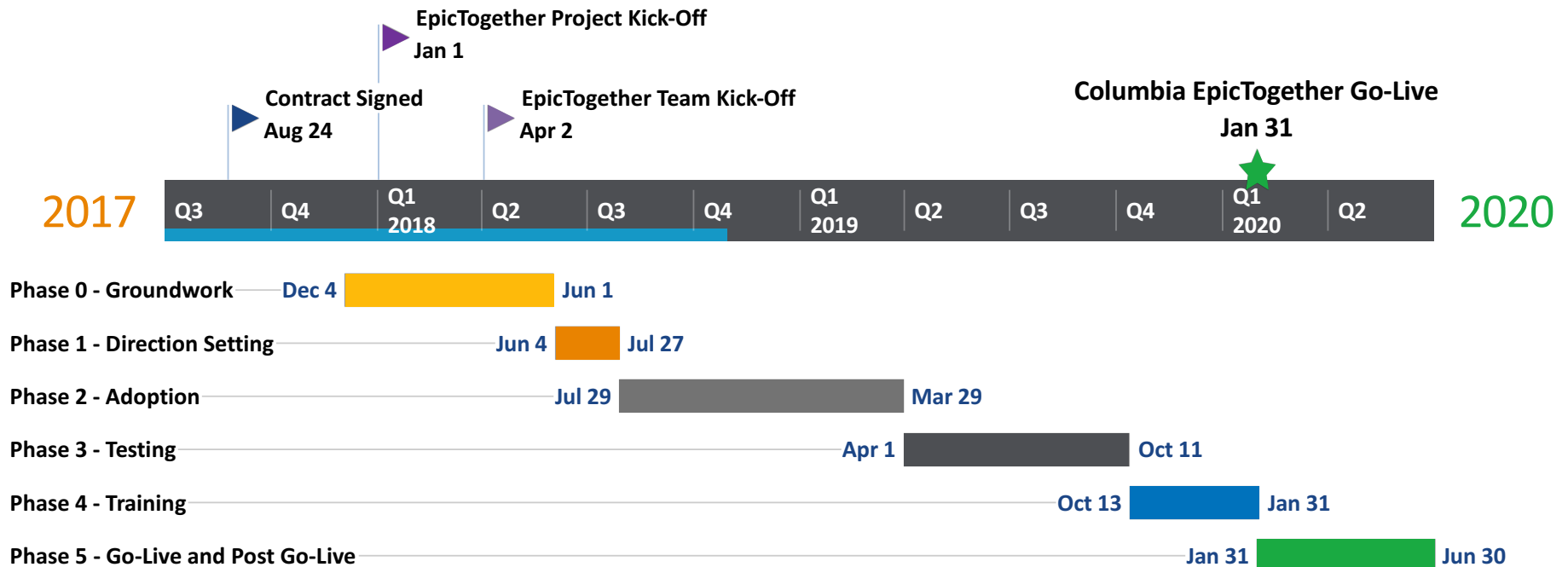
- **Integration is our top priority.**

ColumbiaDoctors
The Physicians and Surgeons of Columbia University

EpicTogether Project Update

ColumbiaDoctors
The Physicians and Surgeons of Columbia University

EpicTogether Project Update

EpicTogether Project Kick-Off
Jan 1

Contract Signed
Aug 24

EpicTogether Team Kick-Off
Apr 2

Columbia EpicTogether Go-Live
Jan 31

2017 | Q3 | Q4 | Q1 2018 | Q2 | Q3 | Q4 | Q1 2019 | Q2 | Q3 | Q4 | Q1 2020 | Q2 | 2020

Phase	Start	End
Phase 0 - Groundwork	Dec 4	Jun 1
Phase 1 - Direction Setting	Jun 4	Jul 27
Phase 2 - Adoption	Jul 29	Mar 29
Phase 3 - Testing	Apr 1	Oct 11
Phase 4 - Training	Oct 13	Jan 31
Phase 5 - Go-Live and Post Go-Live	Jan 31	Jun 30

Project Update – Phase 0 – Groundwork

- Created "EpicTogether" build team of 200+ individuals from Columbia, NYP and WCM.
- Activated work groups with equal, tripartite representation, to advise on design and build:

  Subject Matter Expert Program (SMEs): 405 groups, 2,137 members

  Clinical Operational Readiness (CORe): 147 members

  Access and Revenue Cycle Readiness (ARCR): 70 members

  Clinical Leadership Groups (CLGs): 53 groups, 1,156 members

ColumbiaDoctors
The Physicians and Surgeons of Columbia University

EpicTogether Project Update

EpicTogether Project Kick-Off
Jan 1

Contract Signed
Aug 24

EpicTogether Team Kick-Off
Apr 2

Columbia EpicTogether Go-Live
Jan 31

2017 | Q3 | Q4 | Q1 2018 | Q2 | Q3 | Q4 | Q1 2019 | Q2 | Q3 | Q4 | Q1 2020 | Q2 | 2020

Phase	Start	End
Phase 0 - Groundwork	Dec 4	Jun 1
Phase 1 - Direction Setting	Jun 4	Jul 27
Phase 2 - Adoption	Jul 29	Mar 29
Phase 3 - Testing	Apr 1	Oct 11
Phase 4 - Training	Oct 13	Jan 31
Phase 5 - Go-Live and Post Go-Live	Jan 31	Jun 30

Project Update – Phase 1 – Direction Setting

- Successfully completed 300+ Direction Sessions resulting in 1,700+ build decisions.
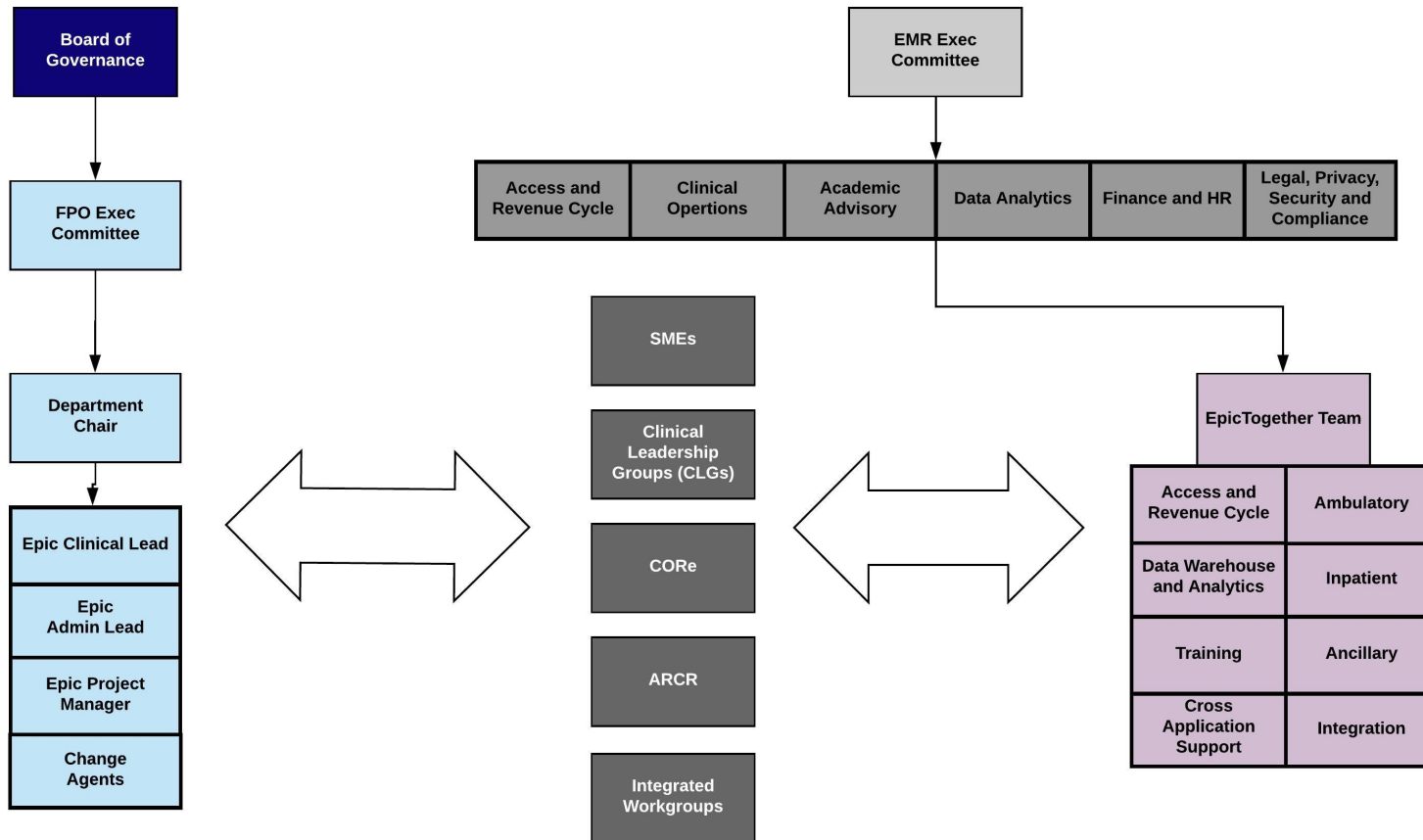
Project Update – Phase 2 – Adoption

- Completed two of three Adoption Sessions with nearly 100% agreement of EpicTogether workflows amongst the 3 institutions
- Build Wave 1/4 complete (21% of build tasks complete)
- Remote Hosting Migration complete (9/2018)

ColumbiaDoctors
The Physicians and Surgeons of Columbia University

EpicTogether Project Update

- Standardized vendors and tested systems across the enterprise (including interfaces)

- Established a tripartite multimedia communications program

- Established a tripartite Joint Legal, Privacy, Security, and Compliance Committee (LPSC):
  - Expanded tripartite agreements:
    - Organized Health Care Agreement (OHCA)
    - Data Sharing Agreement to include research and clinical data
  - Developed tripartite policies and initiatives, including:
    - Shared Risk Response Plan
    - Joint Notice of Privacy Practices
    - Joint Authorization to Release Information Form
    - Confidential Patient Policy
    - Improper Data Access Sanction Policy

- Established ColumbiaDoctors Change Management Team

ColumbiaDoctors
The Physicians and Surgeons of Columbia University

EpicTogether Project Functional Stucture

Board of Governance
FPO Exec Committee
Department Chair
Epic Clinical Lead
Epic Admin Lead
Epic Project Manager
Change Agents

EMR Exec Committee

| Access and Revenue Cycle | Clinical Opertions | Academic Advisory | Data Analytics | Finance and HR | Legal, Privacy, Security and Compliance |

SMEs
Clinical Leadership Groups (CLGs)
CORe
ARCR
Integrated Workgroups

EpicTogether Team

Access and Revenue Cycle	Ambulatory
Data Warehouse and Analytics	Inpatient
Training	Ancillary
Cross Application Support	Integration

Version 2 Rev.07/19/2018

ColumbiaDoctors
The Physicians and Surgeons of Columbia University

Operational Readiness / Change Management

ColumbiaDoctors
The Physicians and Surgeons of Columbia University

Why Do We Need Change Management?

"We will work together to standardize"

"We will adopt the Foundation System"

We Have to Change to Be Operationally Ready

- Successful Epic clinical and business systems adoption necessitates change over the next 15 months.

- Change can be disruptive if not managed thoughtfully.

- Epic's Foundation System will limit the variability of our business and clinical processes for care delivery in the practice setting.

- The Epic team's past experience in AMCs indicates that adoption of common operational workflows is a key driver in a successful implementation.

- Active change management contributes to the implementation's success. The Columbia project team validated this in discussions with our peer organizations.

Workflow Approved from Adoption Session 1
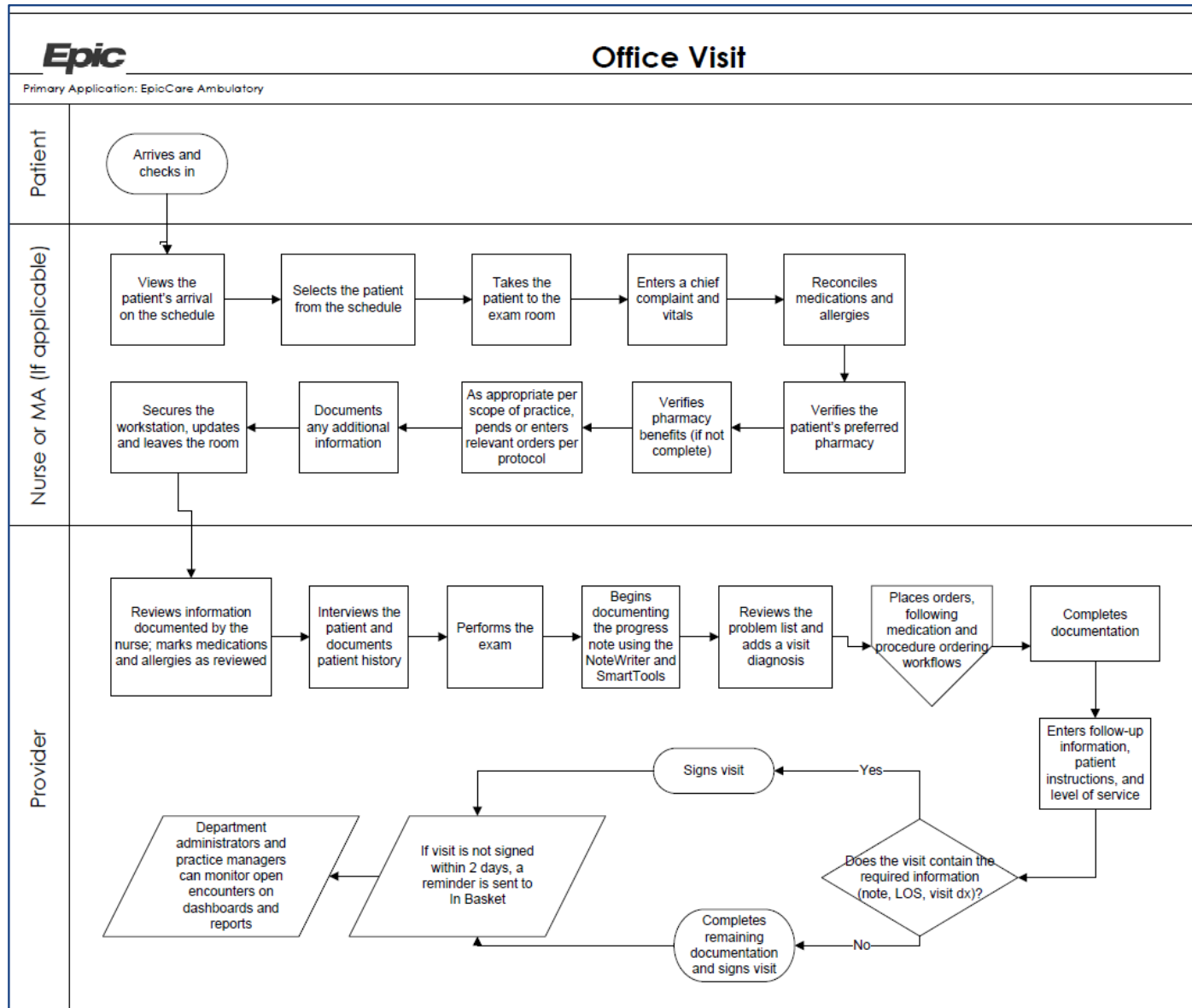
Who Will Be Involved in Operational Readiness and Implementing the Changes Needed?
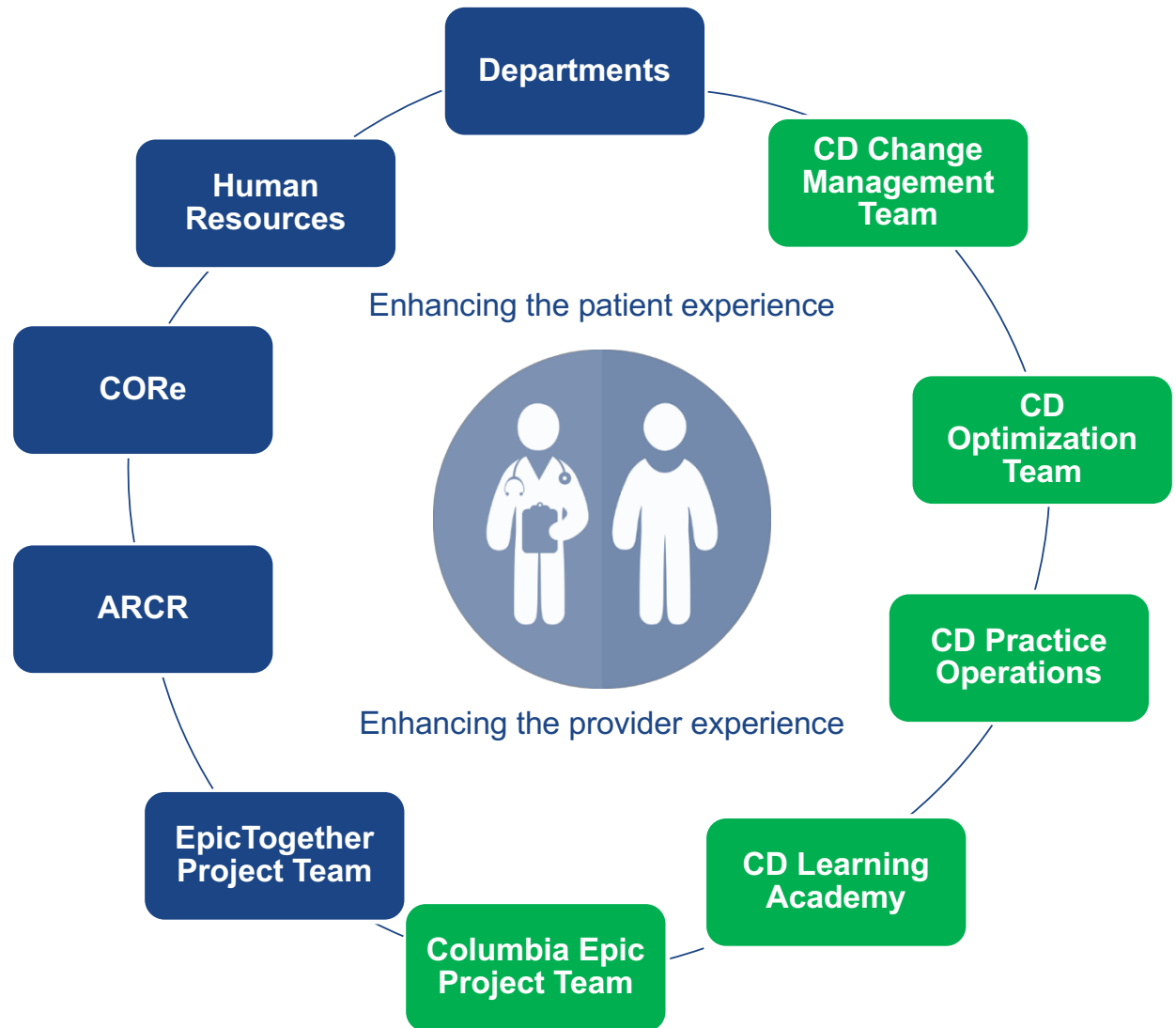
Departmental Operational Readiness Leaders

Readiness Sponsors

Readiness Agents

We Will Be Epic Together! - Partners For Success

- ColumbiaDoctors has stood up an internal change management team to support departments' operational readiness efforts.

- Team members will provide support and expertise in how to drive change in three areas:

  - Clinical support workflows (processes that surround and support the physicians)

  - Business workflows (check in, check out, scheduling, call centers)

  - Revenue cycle workflows

- The team will partner with a variety of other resources.

Departments

CD Change Management Team

Human Resources

Enhancing the patient experience

CORe

CD Optimization Team

ARCR

CD Practice Operations

Enhancing the provider experience

EpicTogether Project Team

CD Learning Academy

Columbia Epic Project Team

ColumbiaDoctors
The Physicians and Surgeons of Columbia University

EpicTogether Training

ColumbiaDoctors
The Physicians and Surgeons of Columbia University

EpicTogether

Training Program Guiding Principles

- Organize training by role and workflow, not by system features and functions.

- Create a structured training schedule with flexibility that may accommodate off business hours.

- Introduce training content over a reasonable period of time to avoid information overload.

- Incorporate approaches to measure the success of training goals and the ability to make improvements.

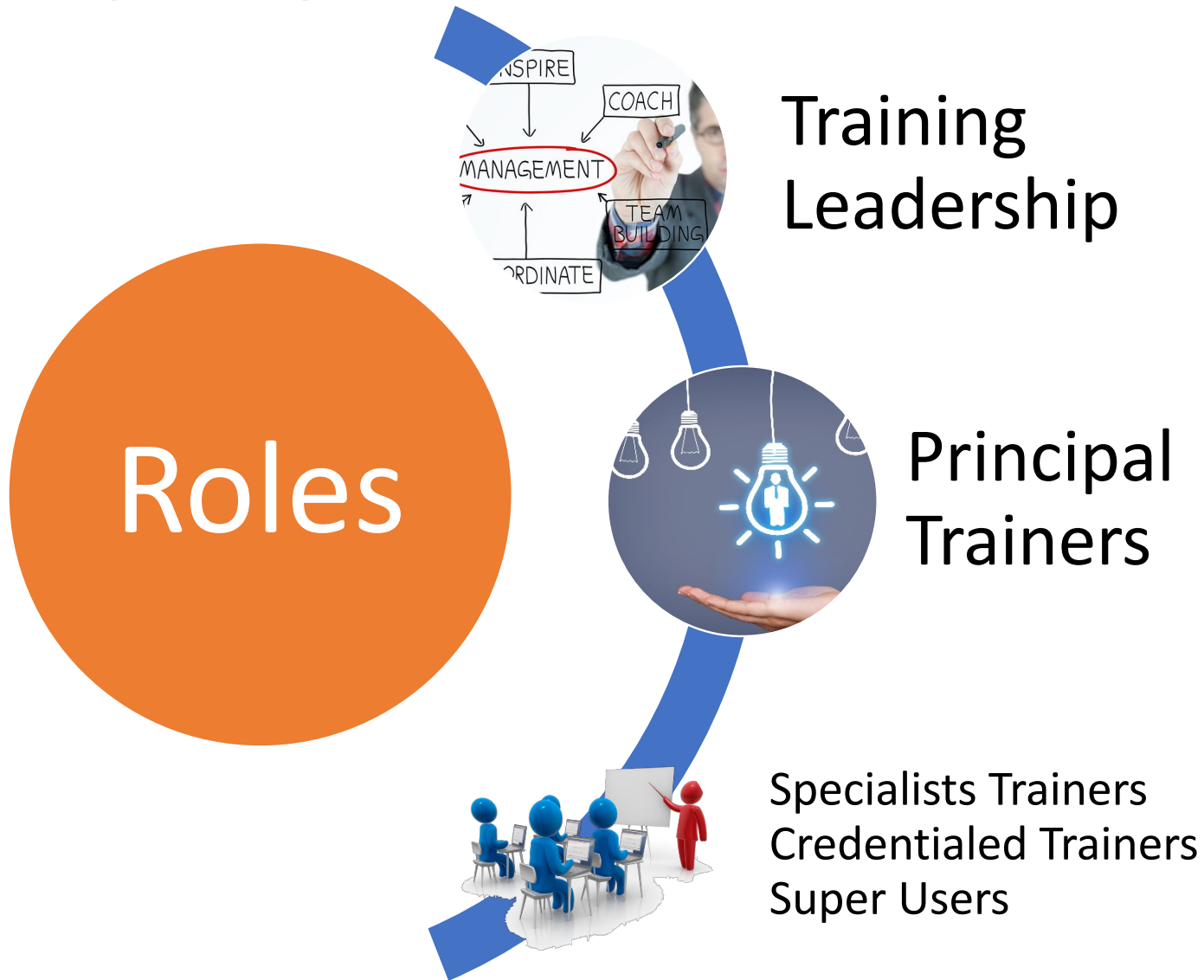- The time and effort devoted to learning cannot negatively impact the patient experience.

ColumbiaDoctors
The Physicians and Surgeons of Columbia University

EpicTogether

Scope of Columbia Go-Live

20,000+ Users

1 System

Training Program Team Roles

Roles

Training Leadership

Principal Trainers

Specialists Trainers
Credentialed Trainers
Super Users

Training Leadership

- Training Advisory Group (TAG)
  - Rachel Lewis, MD – Associate CMIO ColumbiaDoctors
  - Irene Louh, MD – Associate CMO NYP
- EpicTogether Training Team

Principal Trainers

- Certified in respective Epic application(s).

- Work with operational leaders to identify required training tracks/curricula for end-user training.

- Develop classroom and online learning to reflect decided workflows.

- Build and maintain the Epic training environment (MST/ACEs).

- Facilitate Credentialed Trainer program.

Specialist Trainers / Credentialed Trainers

Grow Your Own Specialist Trainers & Credentialed Trainers

- Peer-to-Peer Training
- Trainers with relevant expertise and knowledge
- Specialty scenarios and examples
- Appropriate knowledge of institutional verbiage and workflows

Specialist Trainers / Credentialed Trainers

- Facilitate classroom training

- Assist with training material updates

- Test lesson plans and the Epic training environment (MST/ACEs)*

- Facilitate practice and simulation labs*

- Facilitate personalization labs**

- Administer end user proficiency assessments (EUPAs)

- Record learner training progress in the learning management system (LMS)*

* Credentialed Trainers
**Specialist Trainers

Specialist Trainers / Credentialed Trainers

- Facilitate classroom training

- Assist with training material updates

- Test lesson plans and the Epic training environment (MST/ACEs)*

- Facilitate practice and simulation labs*

- Facilitate personalization labs**

- Administer end user proficiency assessments (EUPAs)

- Record learner training progress in the learning management system (LMS)*

  * Credentialed Trainers
  **Specialist Trainers

MST =   Master Training Environment

ACE =   Actual Classroom Environment

ColumbiaDoctors
The Physicians and Surgeons of Columbia University

EpicTogether

Super Users

- Knowledgeable department/role SMEs

- Dedicated Epic support in the classroom and at their clinic/unit during go-live

- Answer end-user questions about Epic workflows

- Report system issues

- Communicate updates and changes to colleagues

- Serve as long-term point people for disseminating Epic updates and enhancements post-go-live

KEEP CALM AND Call an Epic Super User

ColumbiaDoctors
The Physicians and Surgeons of Columbia University

EpicTogether

End Users

- **Epic System Access**:
    - Awarded to staff who have completed their training track and passed their overall proficiency assessment.
    - Proficiency is demonstrated by achieving a score of 80% or greater on the assessment.
    - Staff who do not achieve proficiency will have the opportunity for a retake.
    - Repeating the full training track will be offered if proficiency is not achieved.
    - If for some reason a learner does not pass the required proficiency assessment by go-live, they will not be allowed access to the system until proficiency is attained. We will make every effort to work with users to achieve proficiency.

Outside of the Classroom

- Setting expectations for playground time

- Educating staff on large organizational or workflow changes prior to Epic training

- Making training a piece of a larger change management initiative

ColumbiaDoctors
The Physicians and Surgeons of Columbia University

EpicTogether

Sample Training Tracks

Front Desk Schegistrar Training Track

Prerequisite E-Learning and Pre-	1 Hour

Appointment Scheduler
GE/IDX Web Scheduling Training (Class) 21 hours

Post-Live Materials	1 Hour
	14 hours

PB Charge Review Training Track

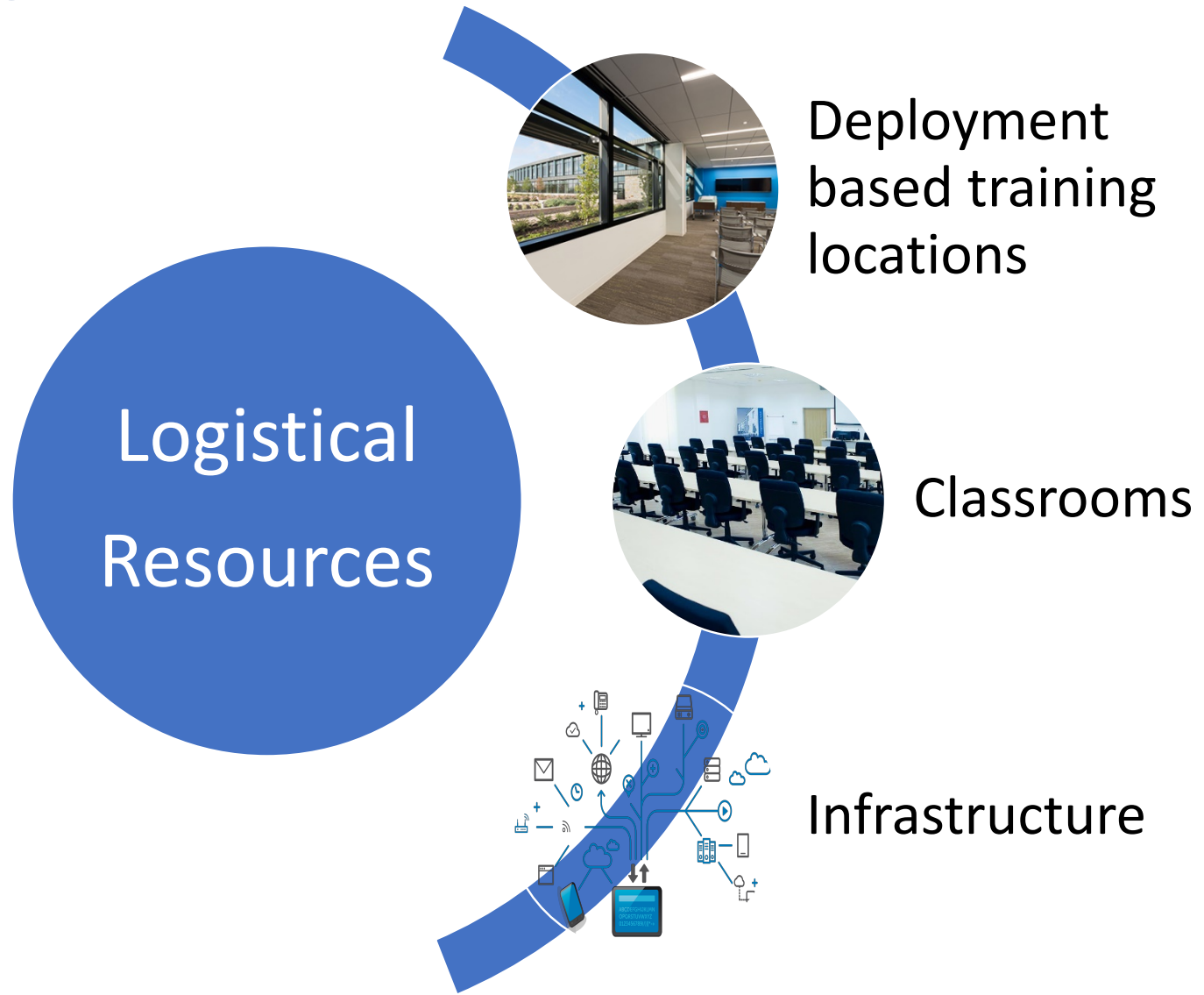|	
Prerequisite E-Learning	1 Hour

Biller-Charge Entry/Charge Review
GE/IDX Billing, ETM, CROWN Billing Class & E-learning
20.5 hours

Post-Live Materials	2 Hours
	9.2 hours

PB Insurance Follow-up Training Track

Prerequisite E-Learning	45 mins

Biller-Accounts Receivables Follow-up
GE/IDX Billing, ETM Training
35 hours

8 hours

Sample Training Tracks

Vascular Surgeon Training Track	
Prerequisite E-Learning	3.5 Hours
OP Vascular Surgeon (class)	2 Hours
IP Vascular Surgeon (class)	2 Hours
End-User Proficiency Assessment	30 Minutes
Personalization Labs	2 Hours
Post-Live Materials	2 Hours
	12 hours

RN, LPN, MA Training Track	
Prerequisite E-Learning	1.5 Hours
Nurse Shared (class)	6 Hours
End-User Proficiency Assessment	30 Minutes
Post-Live Materials	1.5 Hours
	9.5 hours

ColumbiaDoctors
The Physicians and Surgeons of Columbia University

EpicTogether

Training Resources

Logistical Resources

Deployment based training locations

Classrooms

Infrastructure

EpicTogether Training Timeline

2018   Q3   Q4   Q1 2019   Q2   Q3   Q4   Q1 2020   Q2   **2020**

Final Resourcing Numbers for Training
Nov 26

Training Registration Opens
Apr 29

Credential and Specialist Trainers Identified
Mar 29

Super Users Identified
Feb 21

EpicTogether Training Playground Open
Sep 30

Columbia EpicTogether Go Live
Jan 31

Thrive After Go-Live Begins
Mar 2

Today

Task	Timeframe
Role Analysis	Aug 19 - Jan 18
Curriculum Planning	Jan 21 - Jul 19
Training Environment Build	Jul 21 - Sep 27
Credential and Specialist Trainers Onboarding	Sep 30 - Nov 15
Super User and End User Training	Nov 18 - Jan 31
At the Elbow Support	Feb 1 - Feb 28
ColumbiaDoctors Optimization	Mar 2 - Jun 30

ColumbiaDoctors
The Physicians and Surgeons of Columbia University

EpicTogether

Training 30

Next Steps for Training

- Socialize Training Program

- Communicate "no training, no access" standard

- Help identify Credentialed Trainers
  - ~130 (All of West Campus)

- Help identify Super Users
  - ~2100 (All of West Campus)

- Plan ahead, schedule as soon as possible

- Program Immersion meetings/Manager Fairs
  - Coming Soon!

ColumbiaDoctors
The Physicians and Surgeons of Columbia University

EpicTogether

EpicTogether (epictogetherny.org)

Questions?

EpicTogether Project Team Contacts

Contact	Role	Email
Timothy Crimmins, MD	CMIO, Executive Sponsor	tjc2120@cumc.columbia.edu
Roe Long	COO, Executive Sponsor	rml4@cumc.columbia.edu
Ginu John	Dir, EpicTogether Training	gj2293@cumc.columbia.edu
Jonathan Mason	Prog Mgr, EpicTogether Training	jm4762@cumc.columbia.edu
Rachel Lewis, MD	Assoc. CMIO, Clinical Lead	ral160@cumc.columbia.edu
Lloyd Torres	Sr Dir, CMIO Team	lt2641@cumc.columbia.edu
Jonathan Touson	Sr Dir, Change Mgmt	jt3119@cumc.columbia.edu
Naomi Cigan	Asst Dir, CMIO Team	nc2721@cumc.columbia.edu
Tina Sarantos	Project Mgr-IT	ts2808@cumc.columbia.edu
Lianna Piccarillo	Project Mgr-CMIO Team	lm2882@cumc.columbia.edu
Dananjali Ratnayaka	Project Mgr-Revenue Cycle	dr2019@cumc.columbia.edu

ColumbiaDoctors
The Physicians and Surgeons of Columbia University

Thank You for Attending Our EpicTogether Columbia Town Hall

November 7, 2018

ColumbiaDoctors
The Physicians and Surgeons of Columbia University