



# NorthEast Regional Epic Users Group

Agenda – March 2, 2017

*Note: this is a very ambitious agenda – please do your best to start and end on time!*

## Overview

8:00-9:00	Registration & Continental Breakfast	12:15-1:15	Lunch
9:00-10:15	SIG Meetings	1:15-2:30	“Hot Topic” Workgroups
10:30-11:15	Presentations Round 1	2:45-3:45	Epic Futures & Feedback
11:30-12:15	Presentations Round 2	3:45-4:00	Wrap-up

## Detailed Agenda

### 8:00 – 9:00 Registration & Continental Breakfast

9:00 – 10:15 Special Interest Group (SIG) Meetings	
<p><b>1. Ambulatory Care</b></p> <ul style="list-style-type: none"> <li>Location: Collaborate/Create</li> <li>Facilitator: Spencer Erman (HHC)</li> </ul> <p><b>2. ASAP</b></p> <ul style="list-style-type: none"> <li>Location: Salon A</li> <li>Facilitator: Daniel Flanagan (BMC)</li> </ul> <p><b>3. Healthy Planet</b></p> <ul style="list-style-type: none"> <li>Location: Salon B</li> <li>Facilitator: Douglas Gentile (UVM)</li> </ul> <p><b>4. HIM</b></p> <ul style="list-style-type: none"> <li>Location: Salon C</li> <li>Facilitator: Ann D’Arcy-James (CHA)</li> </ul> <p><b>5. Inpatient Care</b></p> <ul style="list-style-type: none"> <li>Location: Embrace/Empower</li> <li>Facilitator: Geoffrey Fallon (MMC)</li> </ul> <p><b>6. Interoperability (Care Everywhere/Epic Link)</b></p> <ul style="list-style-type: none"> <li>Location: Salon D</li> <li>Facilitator: Brian Herrick (CHA)</li> </ul> <p><b>7. Mobile (Haiku/Canto/Rover)</b></p> <ul style="list-style-type: none"> <li>Location: Salon G</li> <li>Facilitator: Naneen Chace-Ortiz (MMC)</li> </ul>	<p><b>8. MyChart</b></p> <ul style="list-style-type: none"> <li>Location: Salon H</li> <li>Facilitator: Carolyn Gingras (Lifespan)</li> </ul> <p><b>9. OpTime/Anesthesia</b></p> <ul style="list-style-type: none"> <li>Location: Salon I</li> <li>Facilitator: Wendy Ouellette (MMC)</li> </ul> <p><b>10. Reporting/Analytics/Data Repository (Cogito/Workbench/Predictive Analytics)</b></p> <ul style="list-style-type: none"> <li>Location: Salon E</li> <li>Facilitator: Abbot Cooper (CHA)</li> </ul> <p><b>11. Resolute/Cadence/Prelude/Grand Central/ADT/Referrals</b></p> <ul style="list-style-type: none"> <li>Location: Salon F</li> <li>Facilitator: David Gates (Boston Children’s)</li> </ul> <p><b>12. Specialty/Ancillary (Beacon/ Beaker/ Cupid/ Kaleidoscope/ Ortho/ Phoenix/ Radiant/ Stork/ Wisdom)</b></p> <ul style="list-style-type: none"> <li>Location: Enliven</li> <li>Facilitator: James DelPonte (Lifespan)</li> </ul> <p><b>13. Willow</b></p> <ul style="list-style-type: none"> <li>Location: Envision</li> <li>Facilitator: John Cyzon (BMC)</li> </ul>

### 10:15 – 10:30 Break



# NorthEast Regional Epic Users Group

Agenda – March 2, 2017

*Note: this is a very ambitious agenda – please do your best to start and end on time!*

## 10:30 – 11:15 Presentations – Round 1

### 1. Change Management

What are effective processes for documenting, tracking and deploying changes to production? How can an organization make sure that that changes are adequately vetted, tested and meet operational needs?

- Location: Salon A
- Presenter: William E. Minsinger, Dartmouth Hitchcock Medical Center

### 2. EP Meaningful Use Stage 2/3 and Transition to MIPS/QPP for Medicare Providers

- Location: Salon B
- Presenter: Mary Anne Sjoblom, University of Vermont Medical Center

### 3. Getting More Out of Dashboards - Reports & Activity Links

MaineHealth Information Systems has implemented the Healthy Planet application that included building and validating a set of registries and clinical quality dashboards for end users. Participants will learn from how providers and teams are using their dashboards day to day and week to week to improve care.

- Location: Collaborate/Create
- Presenter: Julie Trimmer, MaineHealth

### 4. Health Info Exchange and Care Everywhere Updates

Update on progress to Trusted Partners, Care Everywhere and changes to MA Hiway

- Location: Salon F
- Presenter: Larry Garber, Reliant

### 5. Identity: EMP/SER Management

(JEDI/SCCR) How and why we change control our important “identity” related INI's: many of these processes we have created ourselves and can apply to any facility maintaining or going live with EPIC. Minimizing EMP templates - How we maintained such a low number of templates for so many workflows; we have mastered the art of making one template versatile enough to handle multiple workflows. We have even come up with a few techniques that EPIC has commended and has not ever seen people do before.

- Location: Salon C
- Presenter: Ben Osman, Lifespan

### 6. Length of Stay Initiative

Improving the discharge process by using public pended discharge orders, private provider pended orders and improved views to support patient specific needs and inter-professional communication and recommendations for a smooth transition to post-acute facilities.

- Location: Salon D
- Presenter: Julie Michaelson & Jenn McCann, Hartford Healthcare

### 7. Nursing Informatics Council - Incorporating Thrive Training and Utilizing the Group as Super Users

Nursing Informatics Council (NIC) – Nursing representatives from all inpatient units meet monthly for a full 8 hour day. CNIO, Clinical Educators and Training Team prepare presentations – some clinical, some Epic. Training Team uses time for Thrive Training. ClinDoc ID's present on key areas where nurses are struggling. Group gathers feedback on what people need to become more efficient in Epic. Then nurses share with their units. NIC serves as inpatient Nurse Super Users who assist in downtime and on the job education.

- Location: Salon G
- Presenter: Kristin Coffey, Boston Medical Center



## NorthEast Regional Epic Users Group

Agenda – March 2, 2017

*Note: this is a very ambitious agenda – please do your best to start and end on time!*

### 10:30 – 11:15 Presentations – Round 1

#### 8. Provider Efficiency -- Build Techniques to Speed Up Documentation and Ordering

Get your cardiology (or other specialists) to love you. Smart text build that results in improved PEP profiles and provider satisfaction. Strategies:

- 1) Smartlist defaults in progress note “chart by exemption” then use the pull in defaults of smartlist button;
- 2) Development of two distinct assessment-plan smart-texts for a common chief complaints – one that pulls in a complete a-p for “normal”/no-need to follow up diagnoses and one the opens up to a structured complete assessment and plan that is flexible to the diagnosis; and
- 3) Voice recognition compatible build.

- Location: Embrace/Empower
- Presenters: Jessica Zimmerman, Connecticut Children's Medical Center

#### 9. Report Requests Process

Business Intelligence teams created centralized, organization-wide, report requests portal and process. Portal is designed for end users to complete self-service report request entry, based on dynamic template that gathers required standardized information for each type of reporting related request. Governing body reviews, prioritizes and correctly assigns report requests.

- Location: Salon H
- Presenter: Andy Colucci, Lifespan

#### 10. Systems Architect Role - what it means and how they can help

How Systems Architects assist analysts, leadership and end users in optimizing Epic while keeping standardization in mind. Systems Architects have multiple certifications and experience and work across application teams to take into account the global impact of changes, participate in the change management process, lead challenging projects, or help troubleshoot issues that cross multiple applications.

- Location: Salon I
- Presenter: Naneen Chace-Ortiz, MaineHealth

#### 11. Training Environment Build

We've had to do a lot of Training Environment build in order to teach all of our curriculum lines. Specifically, we had to create fake machines and data in order to populate real values in real time for our patients. It was a big lift to create that without formal training; other organizations building out their training environments would have similar hurdles to jump.

- Location: Enliven
- Presenter: Sara Taglieri, Cambridge Health Alliance

#### 12. Upgrade Best Practices

Dartmouth Hitchcock has done several very successful upgrades and feel we have our process well defined and working very well.

- Location: Salon E
- Presenter: Shelley Sanyal, Dartmouth Hitchcock

#### 13. User Audit Process

How it's done at Dartmouth Hitchcock

- Location: Envision
- Presenter: Sam Reney, Dartmouth Hitchcock

**11:15 – 11:30 Break**



# NorthEast Regional Epic Users Group

Agenda – March 2, 2017

*Note: this is a very ambitious agenda – please do your best to start and end on time!*

## 11:30 – 12:15 Presentations – Round 2

### 1. Care Coordination

Maine Medical Partner's Population Health Program supports the role of Care Coordination. Participants will learn from a description of the program and operational workflows. This will include a set of healthy planet functionality that was customized to meet the needs of an advanced model. Productivity and quality reports will also be discussed.

- Location: Salon A
- Presenter: Deb McGill, Maine Medical Partners

### 2. Clinical Governance and Prioritization of Incoming Requests

Southcoast has developed a successful process over the past few years which has helped IT navigate some pretty rough waters.

- Location: Collaborate/Create
- Presenter: Michael Hyder, Southcoast

### 3. Happy Together

Epic's design philosophy for more seamlessly integrating data received from outside organizations into the chart.

- Location: Salon E
- Presenter: Steve Pauls, Epic

### 4. Healthy Planet Optimization for Team Based Population Health Management

MaineHealth implementation of Healthy Planet included optimization of a suite of foundational functionality for complex care management. The optimization topics for discussion include Patient Outreach Encounter, Goals Navigator, Longitudinal Plan of Care, My Panel Metrics, and a Modified Epic Foundation Risk Score.

- Location: Salon B
- Presenter: Ann Marie Hess and Julie Trimmer, MaineHealth

### 5. Learning Homes Dashboard Use

Do you use Learning Homes dashboard to convey training materials to your organization? What works well and what still needs improvement? Are things broken out by role? Do you serve Tips & Tricks, video-based lessons, eLearnings (with or without audio)? How many people are involved in maintaining your Learning Homes, and what is the time commitment?

- Location: Salon C
- Presenter: Kerri Pulaski & Jason Shutt, Cambridge Health Alliance

### 6. MU/MIPS/Quality Measures

How it's done at Dartmouth Hitchcock

- Location: Salon D
- Presenter: Jenica Nelan, Dartmouth Hitchcock

### ~~7. Quality Reporting for Ambulatory Practice Settings [CANCELLED]~~

- ~~• Location: Salon G~~
- ~~• Presenter: Michael Yunes, MaineHealth~~



## NorthEast Regional Epic Users Group

Agenda – March 2, 2017

*Note: this is a very ambitious agenda – please do your best to start and end on time!*

### 11:30 – 12:15 Presentations – Round 2

#### 8. Reaching the End User - Training Approaches

Training structure to ensure that users retain the most information and hands on experience in training, including different scenarios to achieve success in training employees. Topics include: preparing and updating agendas constantly; working with hiring managers to confirm exactly what the users will need to learn; doing one on one Provider refreshers in clinics; and creating tip sheets and manuals for end users; test outs; collaboration with IT analysts; and working as a team to ensure trainee/manager satisfaction.

- Location: Embrace/Empower
- Presenter: Jennifer Gravallese, Cambridge Health Alliance

#### 9. Specialist Training Specialist - A Unique Approach Post Live

Specialist Training Specialist program launched after BMC had already implemented Epic but we wanted to do something similar post live. This initiative involves Associate CMIO and Internal Medicine (GIM) Provider. GIM provider budgeted 5 hours/week for program to meet with fellow MDs who need assistance using the system or optimizing the system. Using Epic's Provider Efficiency Profiles along with surveys and record tracking, we can identify providers who need the most assistance.

- Location: Salon F
- Presenter: Kristin Coffey, Boston Medical Center

#### 10. Stage Gate, Enhancement Prioritization and Introducing Agile Methodologies

Learn how one organization has established a process with several gates to ensure the right projects are prioritized and are allocated resources. And, once that work is allocated, learn some general Agile strategies that may help your teams remain focused and accomplish more.

- Location: Salon H
- Presenter: Lori Boisjoli, University of Vermont Medical Center

#### 11. SU/RA Testing Processes

What sort of processes work well for ensuring that RA and SU packages are tested adequately before being deployed in the production environment. What are good practices for marshalling the right resources and tools to minimize unintended side effects of an RA?

- Location: Salon I
- Presenter: William E. Minsinger, Dartmouth Hitchcock Medical Center

#### 12. Training Structure

How to best design training program (i.e., best topics, how to organize agendas, tip sheets, etc.)

- Location: Enliven
- Presenter: Donna Kilcoyne, Cambridge Health Alliance

#### 13. Transition to eCQM submission

Words of wisdom on build requirements, difficulties for customers who are not on Enterprise Epic (for example, no OpTime or ADT), and advice for transitioning to eCQM measures in Epic.

- Location: Envision
- Presenter: Megan Callahan & Deb Race, Cambridge Health Alliance

**12:15 – 1:15 Lunch / networking**



## NorthEast Regional Epic Users Group

Agenda – March 2, 2017

*Note: this is a very ambitious agenda – please do your best to start and end on time!*

1:15 – 2:30 “Hot Topic” Workgroups	
<p><b>1. ACO - Tracking patients, Care Management, etc.</b></p> <ul style="list-style-type: none"><li>• Location: Salon A</li><li>• Facilitator: Jackie Cawley (MaineHealth)</li></ul>	<p><b>7. Implementation Best Practices</b></p> <ul style="list-style-type: none"><li>• Location: Salon G</li><li>• Facilitator: Gary Goldsmith (Mount Auburn)</li></ul>
<p><b>2. Care Everywhere Trusted Partnerships So We Don't Need Authorization Throughout New England</b></p> <ul style="list-style-type: none"><li>• Location: Salon F</li><li>• Facilitator: Larry Garber (Reliant)</li></ul>	<p><b>8. Ongoing Support/Training (optimization success/failures; team structure; governance)</b></p> <ul style="list-style-type: none"><li>• Location: Collaborate/Create</li><li>• Facilitator: Lori Boisjoli (UVM)</li></ul>
<p><b>3. Change Control and Data Courier Management</b></p> <ul style="list-style-type: none"><li>• Location: Salon B</li><li>• Facilitator: William Minsinger (Dartmouth-Hitchcock)</li></ul>	<p><b>9. Quality Reporting (Registries/ Reports/ Dashboards)</b></p> <ul style="list-style-type: none"><li>• Location: Embrace/Empower</li><li>• Facilitator: Tonya Hongsermeier (Lahey)</li></ul>
<p><b>4. Clinical Decision Support</b></p> <ul style="list-style-type: none"><li>• Location: Salon E</li><li>• Facilitator: TBD</li></ul>	<p><b>10. Regulatory (QPP, MU/MIPS/MACRA, ICD-10, State)</b></p> <ul style="list-style-type: none"><li>• Location: Salon H</li><li>• Facilitator: Tiffany Stack (BMC)</li></ul>
<p><b>5. Controlled Substance: Opioid Prescribing</b></p> <ul style="list-style-type: none"><li>• Location: Salon C</li><li>• Facilitator: Richelle DeMayo (CT Children's)</li></ul>	<p><b>11. SUs/Upgrades/Testing/Environment Management</b></p> <ul style="list-style-type: none"><li>• Location: Salon I</li><li>• Facilitator: Ebenezer Awe (Lifespan)</li></ul>
<p><b>6. Discharge Process and Challenges</b></p> <ul style="list-style-type: none"><li>• Location: Salon D</li><li>• Facilitator: Jillian Charles (UVM)</li></ul>	<p><b>12. Telehealth</b></p> <ul style="list-style-type: none"><li>• Location: Enliven</li><li>• Facilitator: Susan Marino (Hartford Healthcare)</li></ul>
	<p><b>13. Training &amp; T.O.T.S. (Training On The Side)</b></p> <ul style="list-style-type: none"><li>• Location: Envision</li><li>• Facilitator: Audra Dimitriadis (DFCI)</li></ul>

**2:30 – 2:45 Break**



# NorthEast Regional Epic Users Group

Agenda – March 2, 2017

*Note: this is a very ambitious agenda – please do your best to start and end on time!*

**2:45 – 3:45**    **Presentation** (Salons E/F)

- **Epic Futures, Healthy Planet overview, Interoperability, & session take-aways**  
Sean McCormick, Epic

**3:45 – 4:00**    **Wrap-up** (Salons E/F)

## Meeting Venue

Boston Marriott Burlington  
 One Burlington Mall Road  
 Burlington, MA 01803  
 781.229.6565  
 GPS: 42.49016,71.19556 (42°29'24.6"N 71°11'44.0"W)

## NEREUG Participating Organizations

Atrius Health	McLean
Boston Children's	MGH Physician Org.
Boston Medical Center	Mount Auburn Hospital
Brigham & Women's	Newton-Wellesley
Brigham & Women's Physician Org.	Northshore Medical Center
Cambridge Health Alliance	Partners (Corporate)
Care New England / Providence	Partners Community Physician Org.
Community Health Center of Cape Cod	Partners eCare
Connecticut Children's Medical Center	Partners Health Care at Home
Cooley Dickenson	Pediatric Physicians' Organization at Children's
Dana Farber Cancer Institute	Reliant Medical Group
Dartmouth Hitchcock Medical Center	Riverbend Medical Grp
East Boston Neighborhood Health Center	Saint Mary's - Waterbury
Elliot Health System	South Shore Hospital
Epic Systems	Southcoast Health System
Hartford Healthcare	Spaulding Rehab
Lahey Health	St.Francis - Hartford
Lifespan	UMass Memorial Health Care
Lynn Community Health Center	University of Vermont Medical Center
MaineHealth	Yale New Haven Health
Massachusetts General	