



NorthEast Regional Epic Users Group

Agenda – October 1, 2019

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^[1]

9:00 – 10:15 Special Interest Group (SIG) Meetings	
<p>1. Ambulatory Care</p> <ul style="list-style-type: none"> ● Location: Ballroom North ● Facilitator: Rebecca Mishuris (BMC) <p>2. ASAP</p> <ul style="list-style-type: none"> ● Location: Meeting Room B ● Facilitator: Shilpa Kamineni (MAH) <p>3. Healthy Planet</p> <ul style="list-style-type: none"> ● Location: Meeting Room D ● Facilitator: Isabella Veillette (HHC) <p>4. HIM</p> <ul style="list-style-type: none"> ● Location: Junior Ballroom ● Facilitator: Natallia Seviaryn (Southcoast) <p>5. Inpatient Care</p> <ul style="list-style-type: none"> ● Location: Ballroom South ● Facilitator: Pamela Manor (UMass) <p>6. Interoperability (Care Everywhere/Epic Link)</p> <ul style="list-style-type: none"> ● Location: Meeting Room C ● Facilitator: Eric Alper (UMass) <p>7. Mobile (Haiku/Canto/Rover)</p> <ul style="list-style-type: none"> ● Location: Conference Room North ● Facilitator: Kelly Moss, (MH) 	<p>8. MyChart</p> <ul style="list-style-type: none"> ● Location: Meeting Room A ● Facilitator: Susan Whetstone (Lifespan) <p>9. OpTime/Anesthesia</p> <ul style="list-style-type: none"> ● Location: Conference Room South ● Facilitator: Wendy Ouellette (MH) <p>10. Reporting/Analytics/Data Repository (Cogito/Workbench/Predictive Analytics)</p> <ul style="list-style-type: none"> ● Location: Meeting Room E ● Facilitator: Matthew Ellis (Lahey) <p>11. Resolute/Cadence/Prelude/Grand Central/ADT/Referrals</p> <ul style="list-style-type: none"> ● Location: Ballroom Center ● Facilitator: Anna Tweedie (MH) <p>12. Willow</p> <ul style="list-style-type: none"> ● Location: Showcase Overlook ● Facilitator: Hanh Chu (Lahey)

10:15 – 10:30 Break



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10:30 – 11:15 Presentations – Round 1

1. A Hero's Tale: EMP and SER Governance [XGM 2019]

Presenters share successes and challenges related to user (EMP) and provider (SER) governance, with a focus on maintenance and deployment.

- Location: Meeting Room D
- Presenter: Benjamin Osman, Lifespan and Daniel Myrtle, UMass Memorial

2. Clinical Decision Support for Opioid Prescribing [UGM 2018]

This team commissioned an Opioid Prescribing Task Force to evaluate different tools that help monitor and promote safer opioid prescribing. Presenters share the package of tools they created, including a dedicated Opioid Documentation Activity, a set of factors for high-risk patient identification, a screening tool, BestPractice Advisories, an Opioid Refill Protocol, and required wording to allow partial fill of prescriptions.

- Location: Showcase Overlook
- Presenter: Kit Chan and Ian Quelle, Partners Health Care System

3. An Ambulatory Optimization Project for Clinical Efficiency [UGM 2018]

Hear from a team whose goal is to train providers and clinical staff on the many ways they can increase efficiency, decrease time spent navigating charts, and increase patient safety. Learn how to plan and implement a multi-phased ambulatory optimization project specific to your institutions' mix of practice specialty, size, and varied staffing models.

- Location: Ballroom South
- Presenter: Henry D'Angelo, Laurie Hassan, Lindsey Wilson, Partners Health Care System

4. Finding Efficiency within Epic Change Management [XGM 2019]

All healthcare organizations have to wrestle with the balance between making improvements to the EHR and keeping up with maintenance and standard service changes. Come learn three strategies to give time back to your Epic builders to make important system improvements.

- Location: Ballroom Center
- Presenter: Matt McCarthy and Roger Murray, Partners Health Care System

5. How to Make CDS That Works (and Make Sure It Works) [UGM 2018]

Ensuring clinical decision support (CDS) is effective can be trickier than it seems. Come learn a key to success: monitoring and evaluating CDS interventions to optimize and improve them - and to make sure they're working as expected. Presenters describe a range of strategies, including end-user surveys, direct feedback tools, statistical detection of CDS malfunctions, and standardized processes for CDS evaluation.

- Location: Conference Room South
- Presenter: Sayon Dutta, Partners Health Care System

6. The CDS Frontier: Pushing the Limits of BPAs [UGM 2018]

Effective clinical decision support (CDS) is one of the most clear ways that electronic health records can lead to improvements in patient care. For a BestPractice Advisory (BPA) to be clinically useful, many feel that it requires a combination of appropriate, transparent logic and a one-step action directly from the alert. In this session, presenters show how they worked with dynamic text and extensions to create BPAs that are both informative and actionable.

- Location: Meeting Room E
- Presenter: David Rubins, Partners Health Care System



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7. Social Determinants of Health Screening

Social Determinants of Health (SDOH) are defined as economic and social circumstances that can impact patients' health. We developed a streamlined workflow using rules, BPAs, a smartset, and a PAFcolumn where the medical support staff can easily add the appropriate diagnoses and referrals based on the completion of the SDOH screening questionnaire. The tool is in four languages and can be completed in Epic, Welcome, and MyChart to facilitates connecting the patients to the appropriate community services.

- Location: Junior Ballroom
- Presenter: Janaina Zavolly and Brian Herrick, MD, Cambridge Health Alliance

8. Developing an Enterprise Report Prioritization Process [XGM 2019]

Presenters highlight the process their organization used to develop a multidisciplinary team to manage report requests. The team reviews and approves report requests, prioritizes approved requests based on organizational goals, and determines appropriate team assignment. Learn how the organization developed a goal-based scoring tool to assist in the prioritization process.

- Location: Meeting Room A
- Presenter: Andrew Colucci and Christine Boulanger, Lifespan

9. E-Consults

At CHA we are currently using e-consults in multiple specialties such as; infection control, dermatology, endocrinology, cardiology, and pulmonary. This presentation will go over the use cases for e-consults within medical specialties, the workflow in Epic, the reporting used to measure e-consult adoption, our lessons learned, and the measurable success that we have seen.

- Location: Meeting Room B
- Presenter: Crystal Brandt, Cambridge Health Alliance

10. MyChart Revenue Cycle Updates

Stay up to date with the latest MyChart revenue cycle features, including estimates-as-guest, pre-pay discounts, financial assistance requests, mobile document uploads, and more.

- Location: Meeting Room C
- Presenters: Shawn Bartley, Southcoast Health

11. Zap the Gaps: Phone Tools for Optimizing Patient Experience [XGM 2019]

Learn how one call center uses Epic and third-party tools to improve patients' phone experiences by anticipating patient needs and closing loops. The presenters discuss how they improved the call center staff's experience with an efficient process for documenting phone calls and seeing past-call details in Epic.

- Location: Conference Room North
- Presenter: Ajeet Singh, Brad Herrick, Boston Children's Hospital

11:15 – 11:30 Break



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11:30 – 12:15 Presentations – Round 2

1. Aggregating External EMR Data in a Clinically Integrated Network (CIN)

Presenters discuss overall strategies for collecting data to provide a more comprehensive picture for your quality measure reporting and other CIN-related metrics..

- Location: Meeting Room E
- Presenter: Epic Staff, Epic Systems

2. Incorporating Sexual Orientation and Gender Identity Everywhere in the EHR [XGM 2019]

While many organizations have implemented procedures to capture sexual orientation and gender identity (SOGI) information and aspire to display and honor this information within the EHR, fewer have completed the actual process of rolling it out in a consistent and thoughtful manner. Presenters discuss the many aspects that need to be considered, including patient-facing materials, staff-facing information, and information used for administrative purposes.

- Location: Meeting Room D
- Presenter: Kit Chan, MD, MPH and Jackie Enos, Partners Health Care System

3. Tackling the ABCs of Burnout: Alerts, BPAs, and Complaints [XGM 2019]

At this organization, alerts and BPAs were identified as a key component contributing to physician and nurse burnout. Learn how they identified the most intrusive BPAs and then systematically determined whether that BPA should be retired or modified. Pre- and post-interventions are shared.

- Location: Junior Ballroom
- Presenter: Ross Hilliard, MD and Angela Lambert, BSN, RN, Lifespan

4. Reimagining Training Without Sacrificing Quality [XGM 2019]

Hear how one organization provided personalized training and reduced time in the classroom by 37 hours per month. Presenters explain the development of learning labs, where students work independently to learn specialty-specific workflows. They also share details about the analysis and planning that went into developing this new approach to training for clinical users.

- Location: Ballroom South
- Presenter: Michelle Macko, BSN, RN and Jodie Vilardi, MEd, BSN, RN-C, Lifespan

5. A New Frontier: Pre-admission Testing Pharmacy-Assisted Med Rec [UGM 2018]

Hear how this institution created a novel process to integrate pharmacy into the pre-admission testing (PAT) workflow of obtaining medication histories prior to surgery. Pharmacy technicians and students obtain accurate medication histories which are effectively communicated across care transitions, resulting in a more streamlined, efficient process.

- Location: Meeting Room A
- Presenter: Andrew Cadorette and Lionel Pico-Vierra, Yale New Haven

6. Efficient Procedure Documentation and Charging [XGM 2019]

Learn about two organizations' approaches to customized procedure documentation forms. Presenters discuss the many positive outcomes including increased charges, efficiency gains, reduced coding corrections, and increased physician satisfaction, as well as lessons learned and how they were able to overcome challenges.

- Location: Meeting Room B
- Presenter: Joanne Phillips and Ryan Mackinnon, Lifespan



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7. Analytics Breakout: Command Center Logistics Panel [UGM 2018]

Panelists lead a discussion of outcomes and realized benefits from deploying patient flow command centers. Hear about their experiences co-locating staff to manage surges and avoid delays through the use of real-time analytics and integrated workflows.

- Location: Conference Room South
- Presenter: Elizabeth Ciotti, Hartford Healthcare, Michael Holmes, Yale New Haven

8. Advance Care Planning: Facilitating Conversation Through Efficient Documentation [UGM 2018]

See standardized advance care planning conversation documentation to support both conversation facilitation and documentation efficiency using best practice, evidence-based models such as the Serious Illness Conversation. Also hear about tools that support continued engagement with patients on completing advanced care plans.

- Location: Showcase Overlook
- Presenter: Christopher Murry, Lindsay Bileau, Isabella Stumpf, Maine Health

9. Capacity Coordination Center: Managing Inpatient Capacity and Census [UGM 2018]

Learn about the Capacity Coordination Center (CCC), a multi-disciplinary, 24/7 operation that uses real-time Epic-based data to maximize the utilization of inpatient resources, improve flow, and positively impact the delivery of care throughout a 1,541-bed, 2-campus academic medical center. Discussion includes structure and stakeholder review, as well as ways you can use data to break down silos and impact care broadly.

- Location: Conference Room North
- Presenter: Robert Fogerty and Laura Jansen, Yale New Haven

10. Level Up Your Sherlocks and Checklists [XGM 2019]

Learn the methodologies used to effectively manage Sherlock tickets and Checklists. Hear the strategies and techniques for regular monitoring, as well as for collaborating with other teams to drive progress on issues and projects. Presenter also shares next steps for ongoing error analysis.

- Location: Meeting Room C
- Presenter: Kelly Batch and Jim Voss, Trinity Health of New England

11. Transfer Center - Overview - Streamline Patient Transfers & Improve Capacity Management and Throughput

Learn about the Transfer Center module Epic released in 2017. Transfer Center provides a single place for nurses and administrative staff to capture patient medical information, facilitate provider communications, track physician and financial approvals, document transportation progress, and see real-time bed availability and registration progress. We'll show a full workflow demo including the latest features, answer questions, and give feedback.

- Location: Ballroom Center
- Presenter: Colleen Mason, Cambridge Health Alliance

12. Promoting Cross-Institutional Provider Communication with Care Everywhere [UGM2018]

Presenters show how they transitioned from a basic EpicCare Link approach to sharing patient information with affiliated outside providers, to using Direct messaging and other communication methods through Care Everywhere.

- Location: Ballroom North
- Presenter: Rebecca Mishuris, MD, Margie Greaney, Boston Medical Center



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12:15 – 1:15 Lunch^[2] / networking

1:15 – 2:30 “Hot Topic” Workgroups	
<p>1. Analytics</p> <ul style="list-style-type: none">● Strategy & tactics (self-service, tools, team designs, vision, governance, roadmap, implementation, new uses, etc.)● Predictive Analytics● Dashboards - Actionable for Provider and Care Team● Caboodle <ul style="list-style-type: none">● Location: Junior Ballroom● Facilitator: Travis Leonard (MH)	<p>8. Interoperability</p> <ul style="list-style-type: none">● Care Everywhere Trusted Partnerships So We Don't Need Authorization Throughout New England● Medical Device Integration● Epic API and Third Party company products● Dragon● Integrating App Dev Projects with Epic <ul style="list-style-type: none">● Location: Showcase Overlook● Facilitator: Brian Herrick, MD (CHA)
<p>2. Decision Support</p> <ul style="list-style-type: none">● Clinical Decision Support● Implementation Best Practices● Radiology Decision Support for the new CMS regulation in 2019● AntiMicrobial Stewardship● Electronic Prescription of Controlled Substances● Clinical Pathways - 1) Incorporating provider and non-provider aspects; 2) Success or failure experiences● ED/inpatient sepsis protocols and order set compliance tracking● FDB Alertspace (institution-specific modification of medication alerts - content from First Databank) <ul style="list-style-type: none">● Location: Ballroom Center● Facilitator: Sayon Dutta, MD (Partners)	<p>9. Optimization</p> <ul style="list-style-type: none">● Staffing Strategies (team-building, employee engagement)● Ownership Across Teams (How do analysts on your teams own their build? Do they support specific functionality or all of Ambulatory/IP, etc.)● Optimization Strategy and Evaluation (how to stay on top of requests without drowning)● Standardization across a network - universal order sets, AVS, flowsheets, navigators● In Basket Efficiency● Honor Roll -- How can we help each other achieve 100% of requirements?● Genomics● User provisioning (decommissioning accounts [including automation]; EMP activation/ credentialing clearance workflows; best practices for credentialed provider inactivation)● Inpatient Nursing (nursing care plans, general nursing documentation improvement)● Nurse triage, ambulatory● Strategies for Optimizing Ambulatory Support for Providers● Care coordination and team-based care tools/documentation <ul style="list-style-type: none">● Location: Ballroom South● Facilitator: Andrew Pfeiffer (MH)
<p>3. Financial</p> <ul style="list-style-type: none">● Revenue Cycle Optimization● Revenue/Cost Saving Successes● Referrals & Auths● Providing payor access given state/federal privacy laws● Obtaining New Medicare MBI Number <ul style="list-style-type: none">● Location: Meeting Room C● Facilitator: Deborah Graham (UMass)	<p>10. Regulatory Programs/Quality/Meaningful Use</p> <ul style="list-style-type: none">● Quality Reporting (Registries/Reports/Dashboards)● Regulatory (QPP, MU/MIPS/MACRA, ICD-10, State)● Medicare Secondary Payer Questionnaire Optimization● Integrating regulatory build and reporting changes (TJC, CMS, Mass Health) into Epic <ul style="list-style-type: none">● Location: Conference Room South● Facilitator: Julie Michaelson (HHC)
<p>4. HIM</p> <ul style="list-style-type: none">● Behavioral Health in Epic (Privacy, etc.)● HIV privacy law, effort to change● HIV Tests within EpicCare Link and Break the Glass● EHR Safety Event tracking and reporting <ul style="list-style-type: none">● Location: Meeting Room A● Facilitator: Tim McMahon (UMass)	



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<p>5. Patient Engagement / Outreach / Experience of Care</p> <ul style="list-style-type: none">● Patient experience & education (e.g., MyChart Bedside)● Kiosks, tablet use for patient self service (Scheduling, eCheckin, eSig)● Text messaging as outreach/engagement method● Telehealth <ul style="list-style-type: none">● Location: Meeting Room D● Facilitator: Nancy Barrett (Lifespan) <p>6. Patient Flow</p> <ul style="list-style-type: none">● Central registration process/implementation topics● Centralized Call Centers Implementation● Grand Central implementation topics● MyChart, kiosks, tablet use for patient self service (Pre-visit data input, Scheduling, eCheckin, eSig); impact on operations <ul style="list-style-type: none">● Location: Meeting Room B● Facilitator: Shilpa Kamineni (MAH) <p>7. Population Health / Managed Care</p> <ul style="list-style-type: none">● ACO - Tracking patients, Care Management, Referrals● Telehealth (including Epic new features)● Healthy Planet & Link -- engaging community practices and community based resources● Bringing new partners into Epic Platform● Care Across the Continuum● Non-Binary Gender - 2016 federal regulation required EHR's to comply● State-specific Medicaid ACO strategies● Nursing and multidisciplinary care plans● Best practices for ED care plan entries for multi-visit patients in ED setting● Care plan access for other providers/groups (care partners) <ul style="list-style-type: none">● Location: Meeting Room E● Facilitator: Jim Feen, Southcoast	<p>11. Systems</p> <ul style="list-style-type: none">● SUs/Upgrades/Testing/Environment Management● Change Control and Data Courier Management● Best practices for Content Management tool● Infrastructure - Citrix, VM, Imprivata, Cache, UNIX, other servers, etc● Upgrade process post-v2017● BCA & Downtime prep & process / Downtime documentation● Bridges interface errors <ul style="list-style-type: none">● Location: Conference Room North● Facilitator: Roger Murray (Partners) <p>12. Training</p> <ul style="list-style-type: none">● Ongoing Support/Training (optimization success/failures)● T.O.T.S. (Training On The Side)● Developing robust & seamless web based program● Provider personalization and satisfaction● Training & On-Boarding Techniques● User productivity tracking● Super User Programs● End User Satisfaction Improvement● Training Trusted Partnerships (i.e., local relationships for training sign-offs) <ul style="list-style-type: none">● Location: Ballroom North● Facilitator: Nareesa Mohammed-Rajput (South Shore Health)
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2:30 – 2:45^[3] Break



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2:45 – 3:45 **Presentation** (Grand Ballroom)

- **Epic Futures & session take-aways**
Janet Campbell, Epic

3:45 – 4:00 **Wrap-up** (Grand Ballroom)

Meeting Venue

DCU Center
50 Foster Street
Worcester, MA 01608
508.755.6800

Parking

Mercantile Center Garage
201 Commercial Street
Worcester, MA 01608
508.791.7689

NEREUG Participating Organizations

Atrius Health	Massachusetts General
Boston Children's	McLean
Boston Medical Center	MGH Physician Org.
Brigham & Women's	Mount Auburn Hospital
Brigham & Women's Physician Org.	Newton-Wellesley
Cambridge Health Alliance	Northshore Medical Center
Care New England / Providence	Partners (Corporate)
Community Health Center of Cape Cod	Partners Community Physician Org.
Connecticut Children's Medical Center	Partners eCare
Cooley Dickenson	Partners Health Care at Home
Covenant Health	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



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Food Menu

^[1]Continental Breakfast

- Assorted chilled juices
- Assortment of breakfast breads and bagels with cream cheese
- Freshly brewed regular coffee, decaffeinated coffee and selection of teas

^[2]Lunch Buffet

- Chef's House Salad
- Cornbread
- Broccoli Salad
- Roasted Statler Breast of Chicken
- Baked Stuffed Sole
- Roasted Red Bliss Potatoes
- Seasonal Vegetable Medley
- Seasonal Homemade Cobbler

^[3]Afternoon Break

- Assorted Mini Chocolates
- Small Bottled Water

Note: Food is provided for the conference because the conference venues require a minimum expenditure for food from their designated vendor. The food choices selected for NEREUG conferences are the least expensive options offered which meet the required minimum. We know everyone is anxious to keep costs down, and we do our best to keep the NEREUG conferences affordable for everyone.



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Special Interest Group and Hot Topic Workgroup Roles

Participant role

- Be prepared to suggest discussion topics at start of session
- Keep on topic: it's very easy for a discussion to create side conversations or irrelevant arguments
- Try to ensure that everyone has a chance to speak; if someone is really quiet, ask them for their thoughts

Facilitator role

- Start the session by going around the room asking what questions or issues each person would like to cover. List these on a flipchart or whiteboard. Take a quick vote to rank/order the list if necessary.
- This is a discussion group, not a presentation – the facilitator should not make a presentation.
- Objective is to have a vigorous, stimulating discussion about the topics which are the most interesting today for the people in the room.
- Keep on topic: it's very easy for a discussion to create side conversations or irrelevant arguments; if this happens, tactfully intervene and try to direct everyone back to the real topic under discussion – one person speaking at a time.
- Full participation: try to ensure that everyone has a chance to speak; if someone is really quiet, ask them for their thoughts.
- Don't be afraid of silence: it's a very useful tool, giving people time to consider and collect their thoughts, and giving the quiet folks a chance to speak up.
- End on time.