

CHAMPION MEETING

1/12/2021

Tonight's Agenda

2

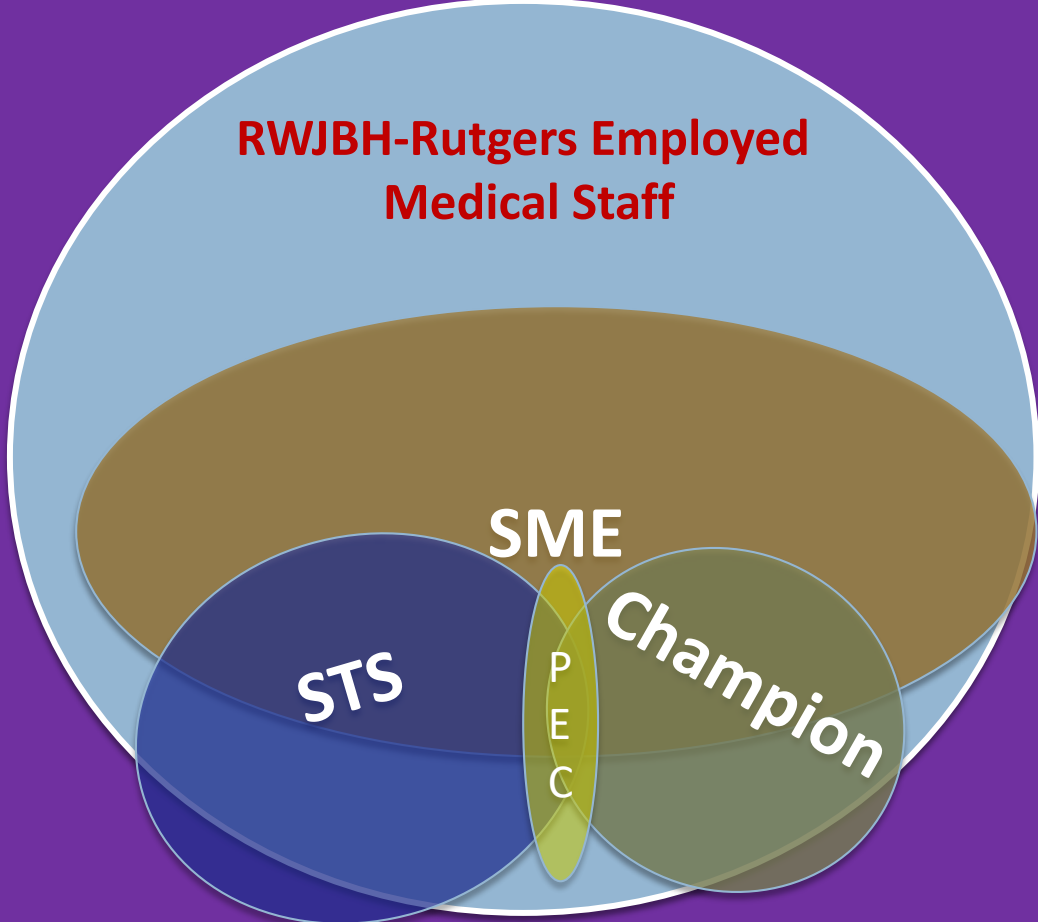
- Welcome & Happy New Year!!
- Champion Role Review
- Upcoming Critical Activities
 - ▣ Key Activities Timeline
 - ▣ Operational Readiness / Change Management
 - ▣ Data Validation
- Logistics & Next Steps
- "Pulse Check" (as time permits)

Champion Role Review

- Create an understanding of:
 - ▣ Physician Roles that have now been formalized
 - ▣ Accountability model
 - ▣ Champion “Rules of Engagement” recommendations for our IT/Epic colleagues

Summary of Physician Roles

All Physicians associated with RWJBH-Rutgers



- SME Duties:**
- Provides input to/review of content, workflows, training materials, etc...
 - Bidirectional communications



- Champion Duties:**
- Primary contact for specialty
 - Identifies/manages SMEs, STSs
 - Bidirectional communications
 - Participates in User Validation
 - Participates in special “events”



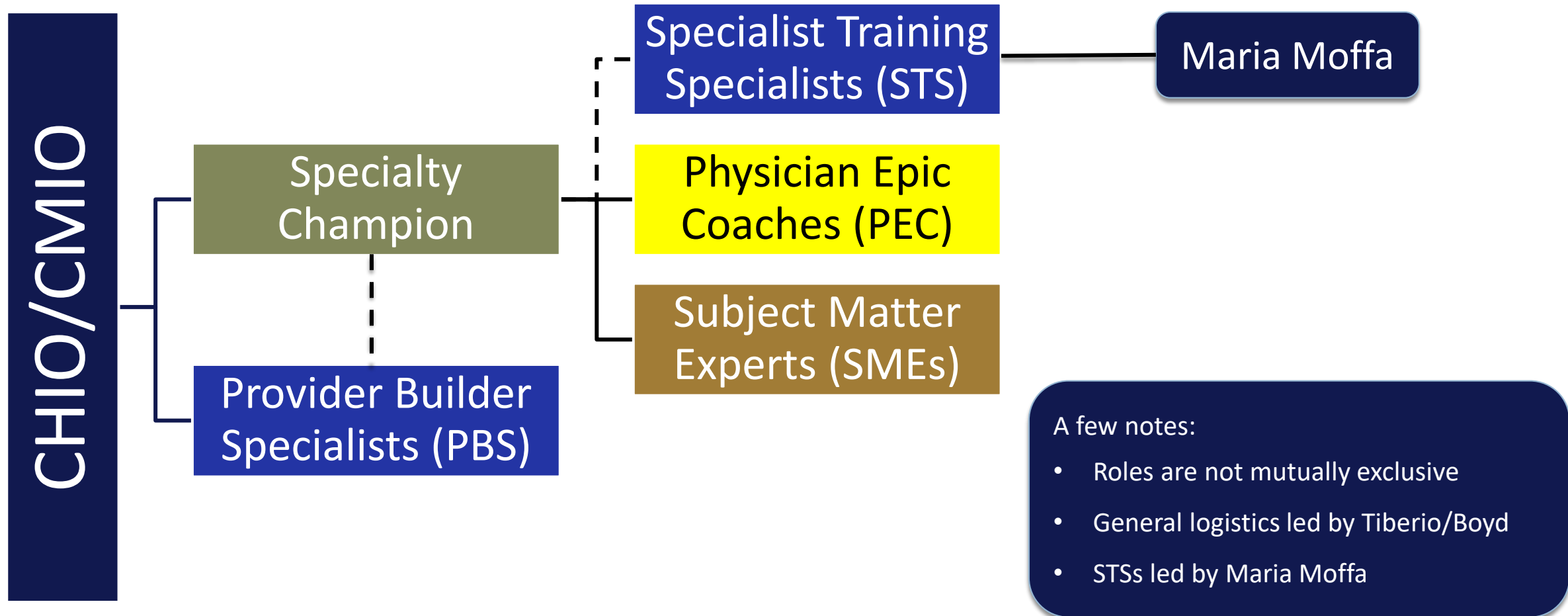
- STS Duties:**
- Trains peers on the Epic system
 - Bidirectional communications
 - Participates in Training Validation
 - May participate in special “events”



- PEC Duties:**
- Identified as a “peer helper” during and after Go Live

Provider Roles Accountability Model

5



Champion “Rules of Engagement”

Goal: Help our colleagues engage Champions...

- ❑ For the appropriate reasons
- ❑ With appropriate processes to both “protect” your time but also make you accessible

Use Cases:

- ❑ Clinical Content Development
- ❑ Requests for Involvement
- ❑ Change Management

Champion “Use Cases”: Clinical Content

7

Example Situations

- ❑ Identification or Replacement of SME(s)
- ❑ Escalations
- ❑ General Specialty Questions
 - ▣ Who are our left pinkie specialists?
 - ▣ Should we build a shut-the-front-door order set?

Process for Engagement

- ❑ IT Point Person: Bjorn Vanberg
- ❑ Weekly reports generated
 - ▣ Reviewed with Drs O’M & S
 - ▣ Action plan developed which may include direct contact from Bjorn

Champion “Use Cases”: Requests for Involvement

8

Example Situations

- ❑ Conversion Data Validation
- ❑ Speaking Engagement / Event or Meeting Attendance
- ❑ Communication Review
- ❑ “Special Needs” e.g.
 - ❑ Can you please speak with Dr. X about?
 - ❑ Can we get a group of XYZ together?

Process for Engagement

- ❑ Notify Tiberio & Boyd of need
 - ❑ As much advance notice as possible
 - ❑ Include specifics, time commitment, timeline, etc...
- ❑ Specific plan for addressing the need will be developed
- ❑ Champion(s) will be given a “heads up”

Champion “Use Cases”: Change Management

9

Example Situations

- ❑ Validation/”Quantification” of Change Management Topics
- ❑ Development of Change Management Plan
- ❑ Speaking Engagement / Event Attendance
- ❑ Issue/Risk Management

Process for Engagement

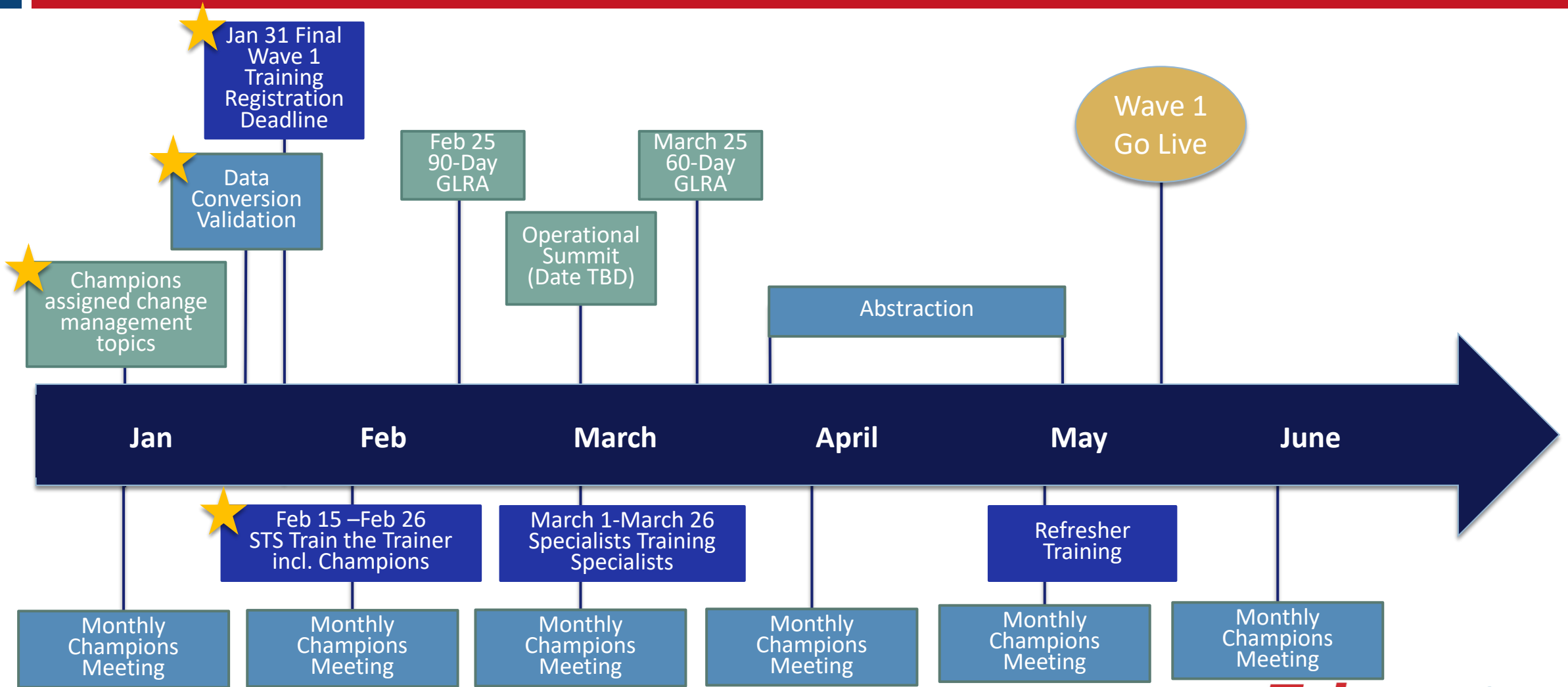
- ❑ This will be a key focus of activity for the foreseeable future
- ❑ Further details in the next section of our agenda tonight

Tonight's Agenda

10

- Welcome & Happy New Year!!
- Champion Role Review
- Upcoming Critical Activities
 - ▣ Key Activities Timeline
 - ▣ Operational Readiness / Change Management
 - ▣ Data Validation
- Logistics & Next Steps
- "Pulse Check" (as time permits)

Q1 & Q2 2021 Activities



Operational Readiness Overview

Goals:

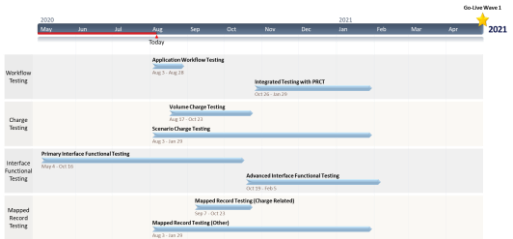
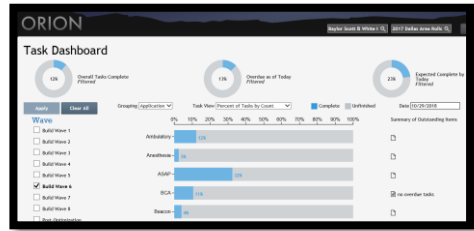
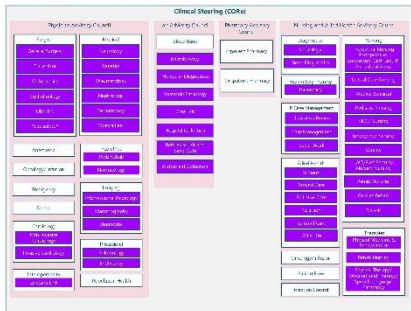
- ❑ Explain overall Operational Readiness Planning process
- ❑ Understand your role in this work

Operational Readiness Key Concepts

13

- **Operational Readiness Goal:** ensure the RWJBH enterprise Epic design is effectively adopted and executed at the local and individual level
- Our approach combines:
 - **Risk Mitigation**
 - Identifies areas of risk associated with the Epic implementation
 - Ensures effective oversight and monitoring are in place to mitigate
 - **Change Management**
 - Ensures necessary training, communication, reinforcement and accountability are in place for the organization to successfully navigate the changes
 - Identifies Operational Owners to implement and monitor Change Management Plans
 - **Leveraging Advisory Councils & Workgroups** from our existing project governance structure

Building the Epic Foundation System for RWJBH



We are here!

Overview of Operational Readiness Plan Development

15



Tools:

Workfront Change Management Portfolio

Detailed Change Management Plan Template

Communications Training
1:1 Contact
Demos
Presentations, etc...

We are here!

Risk & Change Management – Workfront Portfolio

My Work Projects Reporting People Requests Timesheet Setup Search All... ? ☆ ?

Epic Change Management Portfolio Actions ▾

100% ON TIME | 100% ON BUDGET | 100% ROI | 0% ALIGNED | \$0.00 NET VALUE

[Projects](#) [Programs](#) [Portfolio Details](#) [Portfolio Optimization](#) [Documents](#) [Updates](#) [More ▾](#)

[Active Projects](#) [Requested Projects](#) [All Projects](#) [Milestones](#)

[Add Projects ▾](#) [Export ▾](#)
Filter **All** ▾ View **Epic Change...** ▾ Grouping **Nothing** ▾

Name ↑	Owner: Name	Background	Current State	Future State	Reason for Change Management Plan	Plan Category	Implementation Timing	Owning Tower	Tower Impact	Workgroup/Advi Council	Business Owner	Operational Engagement Lead	Applications Involved	Informed Workgroups	Status	Key Metrics/KPIs	Impact
<input type="checkbox"/>					appropriately within Epic.												
<input type="checkbox"/> PBB Interim Charge Entry Workflows		Charging workflows for provider based billing (hospital based) clinics will need to change between a medical group go live and the co-located hospital's go live as medical group providers move onto Epic, but the hospital remains on their heritage system.	Provider based clinics document in either the ambulatory or hospital clinical system, and the systems send charges back to the other system, generate them automatically, or intake them via charge feeds (workflows vary across locations and heritage systems)	Epic will be the source of all charges and the charges will drop based on a PBB designator in the department. Interim state, evaluation is needed to determine how the professional charges will be entered into Epic once the provider medical group is live on Epic.	Significant change in workflows will be required for providers and staff at provider-based clinics.		Go-Live Model			Finance, Integrated Charging	Michelle Meenan, Wanda Mercado, Brenda Lawrence	Dani Voss	PB, HB		Active	Gross Revenue by Department	High
<input type="checkbox"/> POS Payments and Collection Thresholds	Jean Bryll	POS Payments should include pre-payments, copayments, and outstanding balances. RWJBH should set standards for how much of this is collectible at any given encounter with a patient and ensure thresholds are set accordingly.	Hospitals currently collect most of these balances (verify the expected collection thresholds at the hospitals for each balance type), but there are not consistent standards on the ambulatory side.	Epic allows setting thresholds for collectible amounts based on the registration flow used in the encounter (e.g. you can set different thresholds between scheduling and check in). Thresholds should be set for the various workflows and areas, and policies should be updated to reflect system configuration. Evaluation of rollout pre-live should be considered, and communication should	If you are introducing patient previous balance collection to front-end staff for the first time using Epic's integrated POS payment collection, ensure that front-desk users are informed about their ability to collect outstanding balances from prior visits in addition to copays and educate them about how to have that conversation with the patient. Integrate education on both hospital and		Go-Live Model			Self-pay, Scheduling	Jean Bryll, Mary Kelso, Nicole Redwood, Julie Flemming	Dani Voss	Cadence, PB, EC-Ambulatory, HB		Pipeline	POS Cash Collection %	High

Topic Tracker Layout

17

A	B	C	F	I	K	L	M	N	
Change Management Plan Name	Impact	Initial Wave Impact	Key Risks	Plan Owner	Primary Workgroup/Advisory Council	Physician Champion	Business Owner	Operational Engagement Lead	Informed Workgroups

Plan Owner:
Person responsible for LEADING DEVELOPMENT of change management plan

Primary Workgroup/Advisory Council:
Group responsible for FINAL SIGNOFF of plan

Physician Champion(s):
Champions either LEADING or PARTICIPATING in plan development

Business Owner:
Person responsible for OPERATIONAL EXECUTION of plan

Operational Engagement Lead:
OE member responsible COORDINATING plan development

Informed Workgroups:
Groups that need to BE AWARE of the plan

Proprietary and Confidential for Internal Use Only

Epic together.

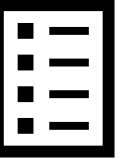
Risk & Change Management Detailed Plans

Workfront Plan Example: POS Collections Tasks

POINT OF SERVICE PAYMENTS COLLECTIONS - CHANGE MANAGEMENT PLAN	Assignments	Start On	Due On
Stakeholders Define all stakeholders and operational owners impacted	Julie Lewis (OE)	10/12/20	12/4/20
	Julie Lewis (OE)	10/12/20	12/4/20
Change Management Approach Define the long-term vision (applications, workflows and roles/responsibilities), understanding some portion of this may be adopted during post go-live optimization Define the Go-Live Model (applications, workflows, roles/responsibilities) to be adopted at point of Epic Go-Live Define any pre-implementation optimization to be adopted prior to go-live (may range from educational only to actual heritage system or workflow optimization) Estimate benefit realization opportunity of change management approach Schedule workflow demo(s) for validation at required workgroup meetings	Jean Bryll	12/2/20	1/8/21
	Jean Bryll	12/2/20	12/4/20
<i>Engage Patient Experience group to help define collections workflows and minimum amounts to ensure adherence to organizational financial and patient experience goals.</i>			
Policy/Procedures Identify policies impacted by change management scope, including new policy requirements Confirm/establish standardized RWJBH facility policies/procedures (may include changes in bylaws, etc) Confirm/establish standardized RWJBH ambulatory policies/procedures (may include changes in bylaws, etc) Generate scripting for all collection workflows and determine timing to deploy			
<i>Engage Legal and Compliance Subject Matter Experts on defined collection scripting, practices, and threshold amounts</i>			
HR/Staffing Tasks Work with operational leaders to determine if any job roles are impacted in any way (expanded or contracted job role, added or eliminated positions, moving job locations, etc) Engage HR to ensure proper procedures are followed to avoid delayed adoption (map out additional staffing related tasks as needed)			
Performance / Metric Reporting / Compliance Tracking Define enterprise operational lead (to track / report) Define best practice / target metrics (pre go-live, go-live, post go-live optimization) Define current RWJBH performance level (metrics) by site/entity Develop process to measure performance and adherence to policy (including pre go-live, go-live, and post-go-live targets, reporting requirements, etc) Develop process to escalate / intervene on non-compliant groups			
<i>Ensure collection thresholds built into Epic match organizational collection goals for various workflows.</i>	Jean Bryll	1/25/21	1/29/21

POINT OF SERVICE PAYMENTS COLLECTIONS - CHANGE MANAGEMENT PLAN	Assignments	Start On	Due On
Communication	Rhett Leibecke	1/4/21	2/26/21
Develop communication plan (what is change, why it is important) – specify target audiences, message channels, frequency and timeframe	Rhett Leibecke	1/4/21	1/22/21
Develop individualized messaging for key stakeholders impacted by change - specify target audience, channels, frequency and timeframe	Rhett Leibecke	1/18/21	1/29/21
<i>Engage the Patient Experience Workgroup and define communication plan for patients / general public</i>	Rhett Leibecke	2/1/21	2/26/21
Hardware/Technical/space implications	Diane Ries	12/21/20	1/8/21
If appropriate, engage project technical team and define acquisition, deployment, testing plan for hardware / devices	Diane Ries	12/21/20	1/8/21
If appropriate, engage department leaders, technical team, and site plant/operations and define plan for updates to physical space / locations impacted by overall change management pla	Diane Ries	12/21/20	1/8/21
Training	Jocelyn Gahndi	12/21/20	1/8/21
Epic Together Training	Jocelyn Gahndi	12/21/20	1/8/21
Work with operational leaders to review Epic Together training curriculum on impacted workflows	Jocelyn Gahndi	12/21/20	1/8/21
Review / revise program training materials to effectively cover impacted workflows	Jocelyn Gahndi	12/21/20	1/8/21
If needed, develop supplemental reference materials (tip sheets, etc)	Jocelyn Gahndi	12/21/20	1/8/21
Supplemental Training	Jocelyn Gahndi	12/21/20	1/8/21
Assess operational training materials (organization policy/procedure, and non-system workflows)	Jocelyn Gahndi	12/21/20	1/8/21
If needed, develop supplemental training materials for operational aspects, and define method for adoption	Jocelyn Gahndi	12/21/20	1/8/21
Go-Live / Readiness	Julie Lewis (OE)	2/8/21	4/9/21
Work with operational leaders to develop additional mitigation steps to prepare for and manage the process during go-live (staffing, scheduling, support, etc)	Julie Lewis (OE)	2/8/21	3/5/21
Ensure device deployment and activation strategies are finalized	Diane Ries	2/15/21	3/19/21
<i>Create signage, scripting, or other patient educational materials on any new collection practices.</i>	Julie Lewis (OE)	3/22/21	4/9/21

Topics Assigned to “Us” for Wave 1



19

- ❑ Dragon Adoption & Mastery [Ambulatory]
- ❑ Medication Review [Ambulatory]
- ❑ Interim Workflows - MedOnc/Infusion
- ❑ Interim Workflows - Muse
- ❑ Ambulatory APP/Residents/Fellows
- ❑ Problem List Maintenance and Etiquette
- ❑ Care Everywhere Workflows
- ❑ Social Determinants of Health (SDOH)
- ❑ Advanced Beneficiary Notice (ABN)
- ❑ Revenue Reconciliation and Accountability
- ❑ In Basket
- ❑ Telehealth
- ❑ Patient Experience / MyChart
- ❑ Provider/Clinician Access to Patient Data
- ❑ Handheld Devices Personalization
- ❑ MyChart/Proxy Access
- ❑ OB External Results Data Entry
- ❑ Referrals Workflow and Process

Data Validation Project

Background:

- ❑ A subset of heritage data has been electronically imported into Epic
- ❑ Initial validation by Informatics is complete
- ❑ Now want actual clinicians/providers to do a second validation

Data Validation Project

21

The “Ask”:

10-20 Providers to validate that data imported into Epic from heritage systems is correct

- ❑ Process Overview
 - ❑ 1 hour call to go over how to look in Epic and to go over a validation spreadsheet that shows what was converted
 - ❑ 2 weeks to validate the data for 5-10 patients
 - ❑ 1.5 hour call to review findings with the application and conversion team
 - ❑ Possible follow up call to verify corrections have been made

To Do:

If you are interested in participating in this work....

- ❑ Please send the following to Terri Boyd (terri.boyd2@rwjbh.org):
 - ❑ Name
 - ❑ Facility
 - ❑ AD Login ID for RWJBH
 - ❑ Email
 - ❑ Cell phone
 - ❑ SSN – last four

Work will begin in late January

Tonight's Agenda

22

- Welcome & Happy New Year!!
- Champion Role Review
- Upcoming Critical Activities
 - ▣ Key Activities Timeline
 - ▣ Operational Readiness / Change Management
 - ▣ Data Validation
- Logistics & Next Steps
- "Pulse Check" (as time permits)

Logistics & Next Steps

Logistics

- ❑ Timesheet Submission Process
 - ❑ You will receive your Timesheet template and instruction in the next week
- ❑ Monthly Standing Champion Meetings will be scheduled through 2021

Next Steps

- ❑ Register for & complete your TTT training (deadline Jan. 31)
- ❑ Introduction of Champions in January
 - ❑ Please send your head shots to Victoria Woodworth (5 of you have already done this!)
- ❑ Sign up for Data Validation project
- ❑ Begin Change Management work – you will hear from your OE lead

Tonight's Agenda

24

- Welcome & Happy New Year!!
- Champion Role Review
- Upcoming Critical Activities
 - ▣ Key Activities Timeline
 - ▣ Operational Readiness / Change Management
 - ▣ Data Validation
- Logistics & Next Steps
- "Pulse Check" (as time permits)

Thank you!

25

