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7 Steps to a Successful Epic Reporting Implementation

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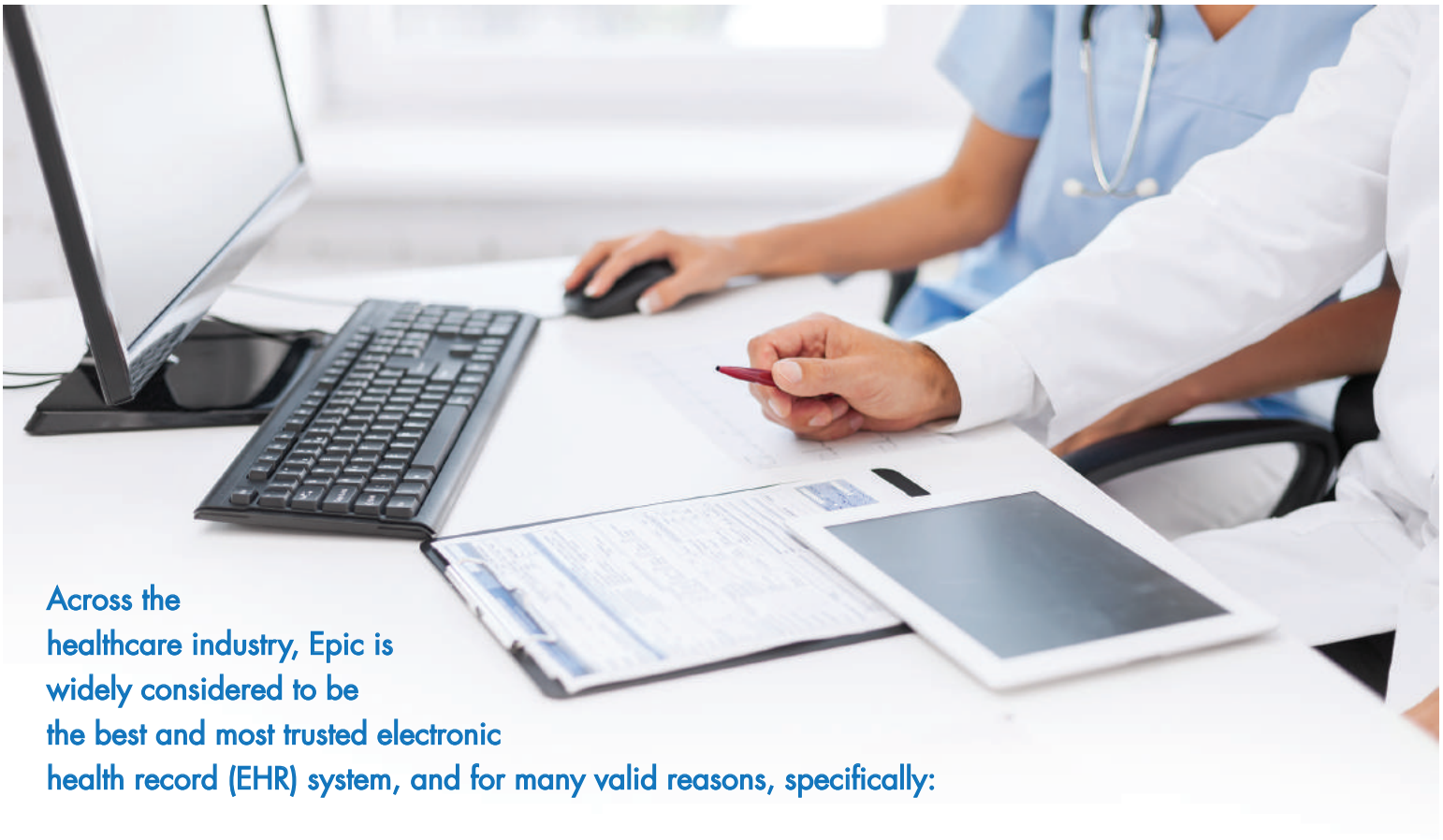

Across the healthcare industry, Epic is widely considered to be the best and most trusted electronic health record (EHR) system, and for many valid reasons, specifically:

- Epic is routinely rated as the number one EHR system by physicians and hospital executives, and has won several industry awards.
- More than 40% of the U.S. population has medical information stored in an Epic EHR system. In 2015, this translated into 180 million patients.
- It's a more scalable and flexible system, suitable for medical practices, community hospitals, safety-net providers, as well as the largest health systems, including: Kaiser Permanente, Cleveland Clinic, Johns Hopkins Medicine, and UCLA Health.
- 70% of HIMSS Analytics Stage 7 hospitals use the EpicCare Inpatient EHR system.
- Epic delivers the most complete range of features, functions, and reports for various user groups and stakeholders.
- It offers complete integration of all core operational processes: clinical information, patient scheduling, billing, and registration.
- Epic EHR can be accessed and leveraged by an entire healthcare community, enabling synergies and driving efficiencies.
- Can be configured and customized to align with current and evolving needs - i.e. it is "future proofed."

KEY CHALLENGES

Despite Epic's advantages and widespread adoption, implementing an EHR system poses key challenges that, for many organizations, can turn into a costly, time consuming, and sometimes frustrating ordeal. Many organizations have raised reporting implementation related concerns and criticisms such as:

- Spending excessive resources modifying Epic's "standard" reports, to later determine what they really need are new custom solutions.
- Not having enough experience with Epic to know how to effectively manage reporting resources over the long-term, which results in resource shortages soon after go-live.
- Discovering weeks before go-live that requests were not adequately formulated and consultants must be hired to retool reports at the last-minute, creating a cost overrun.
- Dealing with slow-performing reports, that contain massive amounts of data, is cumbersome and inefficient.
- Being unprepared to handle the large, post-go-live demand for reports, which typically leads to a sizable backlog.

Encountering one of these problems can impact the success of an implementation, but having several or all of these issues arise concurrently can be costly and affect data integrity. When this happens, it's understandable that the initial enthusiasm can turn to disappointment.

7 STEPS FOR A SUCCESSFUL REPORTING IMPLEMENTATION

The good news is that these implementation problems are not inherent in Epic's EHR system itself. These challenges are not fundamental design flaws, nor core programming weaknesses that must be worked around or mitigated.

Rather, they can be resolved in a way that healthcare professionals may find appealing and intuitive, since it is often at the heart of the advice they give their patients: by being proactive.

Organizations implementing Epic Reporting in their facility can experience a successful implementation if they proactively follow these 7 steps:

1. Create the Vision
2. Assess Resources
3. System Design
4. Build
5. Validation & Testing
6. Implementation
7. Support

step 1

CREATE THE VISION

Before new Epic reports are designed, organizations need to create their business intelligence (BI) vision. This process includes (but is not limited to):

- **Defining the objectives and goals for the data warehouse.**
- **Analyzing all necessary data and reporting requirements, both current scenario and post-go-live.**
- **Establishing a comprehensive project plan with realistic milestones and schedules.**
- **Identifying and mapping out tasks and resources to achieve the stated goals.**

The importance of this first step cannot be underestimated. It is often the case that inefficiencies and performance issues that arise after go-live can be traced back to missteps or omissions occurring during this critical first step.

step 2

ASSESS RESOURCES

The organization must do its due diligence in determining the current reporting related resources available, and an analysis of any gaps that may exist in its current infrastructure.

This gap analysis process proactively reveals whether current resource levels will be sufficient before and after go-live, or if additions or re-allocations are necessary. Ultimately, this step identifies:

- **An overview of the organization's current reporting infrastructure**
- **Weaknesses, vulnerabilities, risks, and gaps that need to be addressed**
- **A plan for how the above gaps will be addressed to ensure adequate resources**
- **The impact of post-implementation resource needs**
- **Whether outside assistance should be brought in**

Throughout this gap analysis, it is vital for organizations to be objective, and not assume their current infrastructure and resource allocation is sufficient because "investments were recently made" or "there have been no problems in the past."

While it is possible that the existing resources or infrastructure will not require significant modifications or upgrades, this fact should be validated to avoid a more costly solution down the road.

step 3

SYSTEM DESIGN

System design is an essential step, yet sometimes lags in the reporting implementation process.

During this step, an organization will define the technical infrastructure, processes, and team required to execute on the vision outlined in step one. Attention is given to the production capabilities needed for generating reports and dashboards.

Efficiencies or economies of scale can be gained by implementing a combination of flexible tools and resources, including:

- **BI data warehouses**
- **Epic dashboards and role-based radar screens**
- **Disease registries and analytical data-marts**
- **Clarity reports**
- **Leveraging consultant services with expertise and prior development experience**

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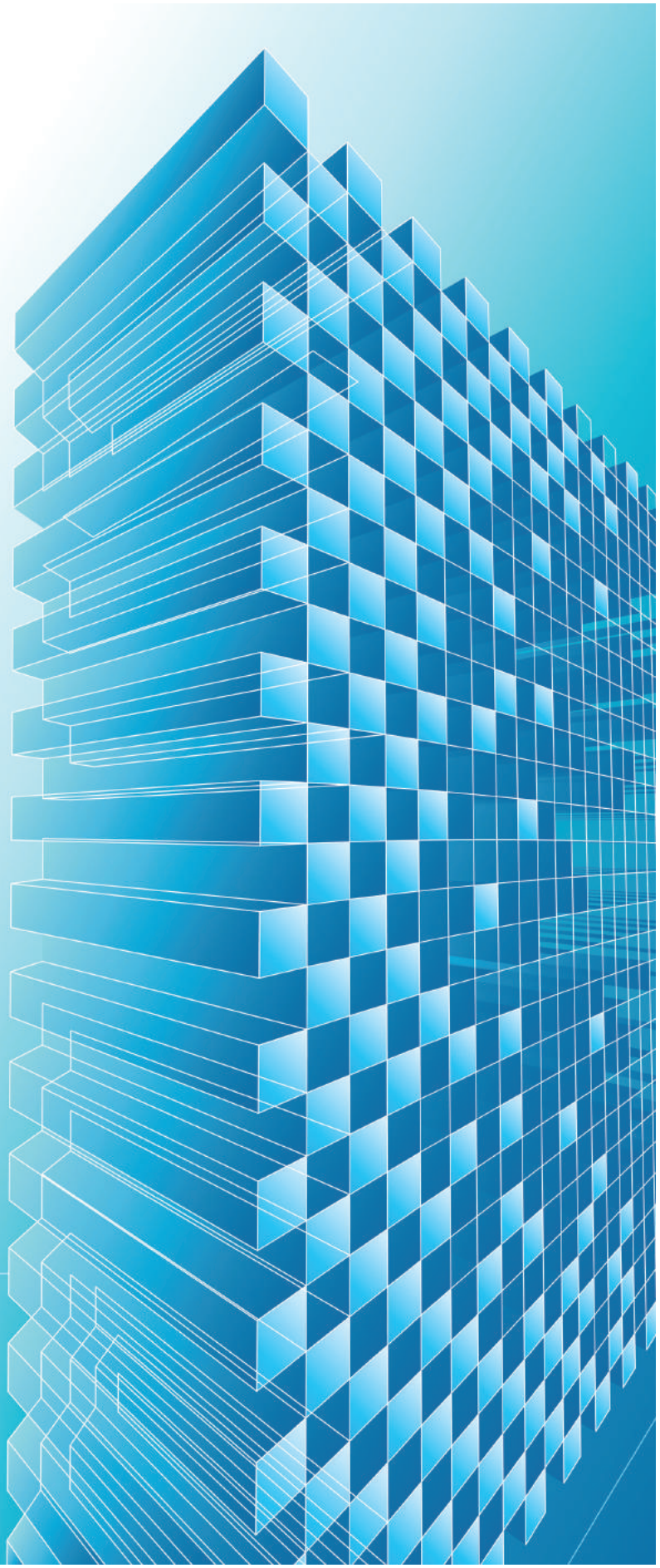
step 4

BUILD

Organizations need to determine the exact data required to build their Epic data warehouses and reports. And, how that data will be extracted, manipulated, converted, and/or integrated with existing legacy systems.

This step can take a significant amount of time, especially in larger organizations with multiple legacy information systems and complex data flows. However, it is time well spent, as it directly supports a successful reporting implementation.

During this step, organizations will decide whether it makes sense to outsource any of their legacy support agreements and/or services. This could free up their internal reporting team to focus exclusively on Epic reporting implementation, supporting the team to come up to speed on Epic more quickly and efficiently.



VALIDATION & TESTING

The validation step allows organizations to:

- **Evaluate the extent to which they are ready for their reporting go-live**
- **Ensure the accuracy of the reporting work completed**
- **Confirm the full inventory of mission critical reports have been recreated**
- **Perform load testing on the reports and processes**
- **Determine if the reporting processes are well established and documented, including distribution methods**
- **Gain user feedback on reports**

At the same time, the validation process gives organizations the opportunity to ensure that they have the right resources in place to effectively use and maintain the reporting system after go-live.

IMPLEMENTATION

During the implementation step, Epic reports go live, and teams begin accessing routine reports, dashboards and self-service analytics.

Some key points to consider:

- **It's imperative to gain timely feedback from users to determine if their data is being accurately reported and reports are distributed as planned.**
- **A large number of report requests tend to occur during this phase, both new and modifications.**
- **Having a process to properly triage the requests is critical to both managing the queue and ensuring mission critical reports are completed preferentially.**

Furthermore, organizations that wisely invested the appropriate time and focus in earlier steps will less likely run into go-live issues that could otherwise derail and delay the reporting implementation.

SUPPORT

Users will need to receive ongoing assistance to resolve report or data related issues. This could include addressing real or perceived reporting errors, helping them refine their reporting requirements, and ensuring the integrity of their data and reporting results.

It is also important to appreciate that the switch to Epic reporting involves a cultural shift for the organization. It changes how the organization interacts with electronic health information to carry out its mission and vision. While these changes are both positive and progressive, change in and of itself can create anxiety and frustration – particularly when new technology is involved!

It's vital to help the staff acclimate and embrace the new reporting system – this can take a few weeks to a few months. Customized training, designed to fit the needs of each user group, is helpful.

PULLING IT ALL TOGETHER

Most organizations lack sufficient in-house resources to both maintain their current reporting system while implementing a new one.

At Syntrix Consulting Group, we have the expertise to guide your organization through this process and to meet your unique needs and goals. We've supported organizations at every stage of Epic implementation, from pre-go-live to several years post-go-live. This experience gives us a unique perspective to propose Epic reporting solutions that address both immediate needs, while building the foundation for future analytics success. Simply put: we understand what works and what does not work in Epic reporting!

In addition, our consultants are Epic certified and have years of hands-on experience with virtually every Epic application – including monitoring and researching ETL execution errors to detect potential data integrity issues early. Our consultants are also strong SQL programmers, and have in-depth experience with multiple reporting tools, including multiple business intelligence suites of applications including platforms from SAP BusinessObjects, Qlik, Microsoft and Logi Analytics.

NEXT STEPS

Contact us today, and discover how we can help your organization experience a smooth, streamlined, stress-free, and successful transition to Epic reporting – so that you are leveraging all of the promised bottom-line advantages and benefits, and steering clear of the costly problems and pitfalls.

Syntrix Consulting Group. We Make Healthcare Data Talk!™

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