

Effective Electronic Patient Record Implementations

Helping You Navigate Your EPR Journey

February 2021



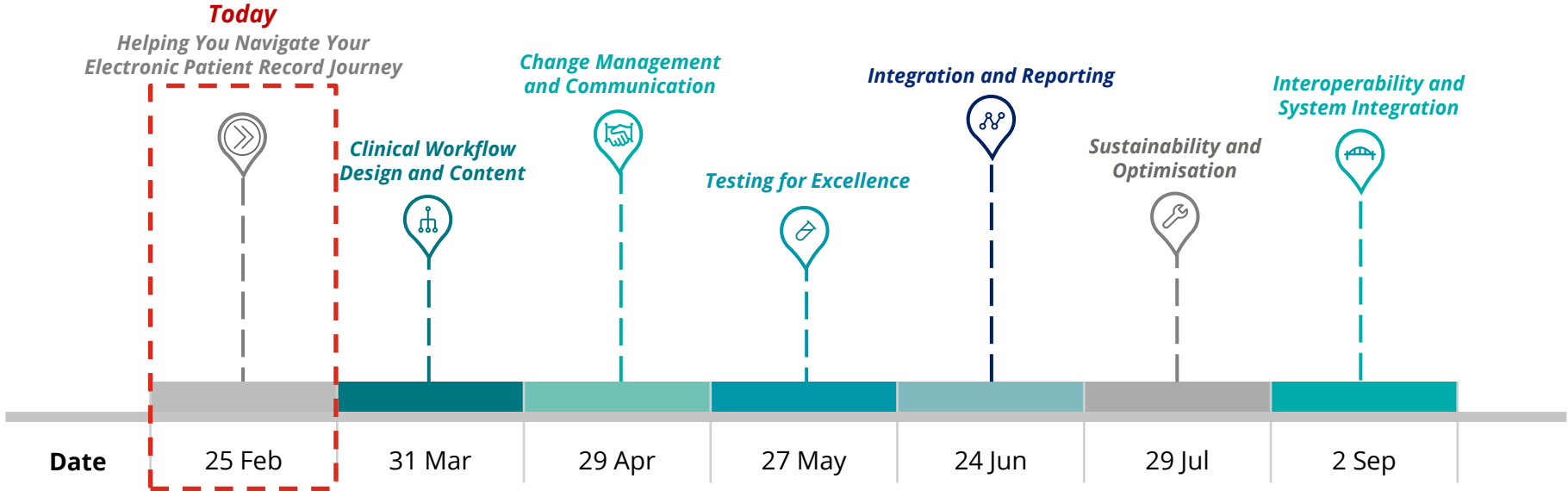
Effective EPR Implementations: Overview of the Series, Purpose, and Schedule

The Effective EPR Implementations webinar series is a set of seven one-hour virtual sessions with Healthcare providers. This series is focused on EPR implementations and driving your success through a holistic implementation approach

Purpose

- ✓ Focus on effective partnerships necessary to succeed in EPR implementations
- ✓ Highlight common pitfalls faced by clients and areas needing support
- ✓ Share key strategies necessary for healthcare practice transformation through EPR implementations

Schedule



Speaking With You Today



Fran Cousins
Partner, UK



Marc Perlman
*Global Digital CARE
Leader, US*



Nick Wong
Managing Director, US



Minakshi Krishnan
Managing Director, US



Imran Chaugule
Senior Manager, US

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Welcome	Frances Cousins and Marc Perlman	5 mins
Effective EPR Implementations: Overview of the Series, Purpose, and Schedule	Frances Cousins	5 mins
Overview of Successful Project Startup <ul style="list-style-type: none">• The Big Picture• Setting the Foundation: Governance, Guiding Principles, and Effective Decision Leadership Support and Alignment• Total Cost of Ownership (TCO)• Strategies for Clinical Design, Change Management, Training, Technology, and Testing	Marc Perlman, Nick Wong, Minakshi Krishnan, Imran Chaugule	30 mins
Our Practice	Marc Perlman	5 mins
Q&A	Frances Cousins	15 mins

UK EPR Landscape

The NHS Long Term Plan commits to fully digitising acute, community and mental health providers by 2024, and introducing an EPR system is an important milestone in any Trust's digital transformation journey.



2023

Target date for secondary NHS healthcare providers to transition to digital records



16-24 months

Average time it takes a hospital to implement an EPR



23%

Proportion of NHS Trusts confirming that the majority* of their patient records are digitised¹



£3.7bn

Government funding confirmed for **40 digitised hospitals** in the biggest hospital building programme in a generation

“ “ The transition has required **major organisational change** and has **not been completely painless** ” ”

- CEO of one Trust transitioning between EPRs

* Between 76 – 99% of patient records

Overview of Successful Project Startup

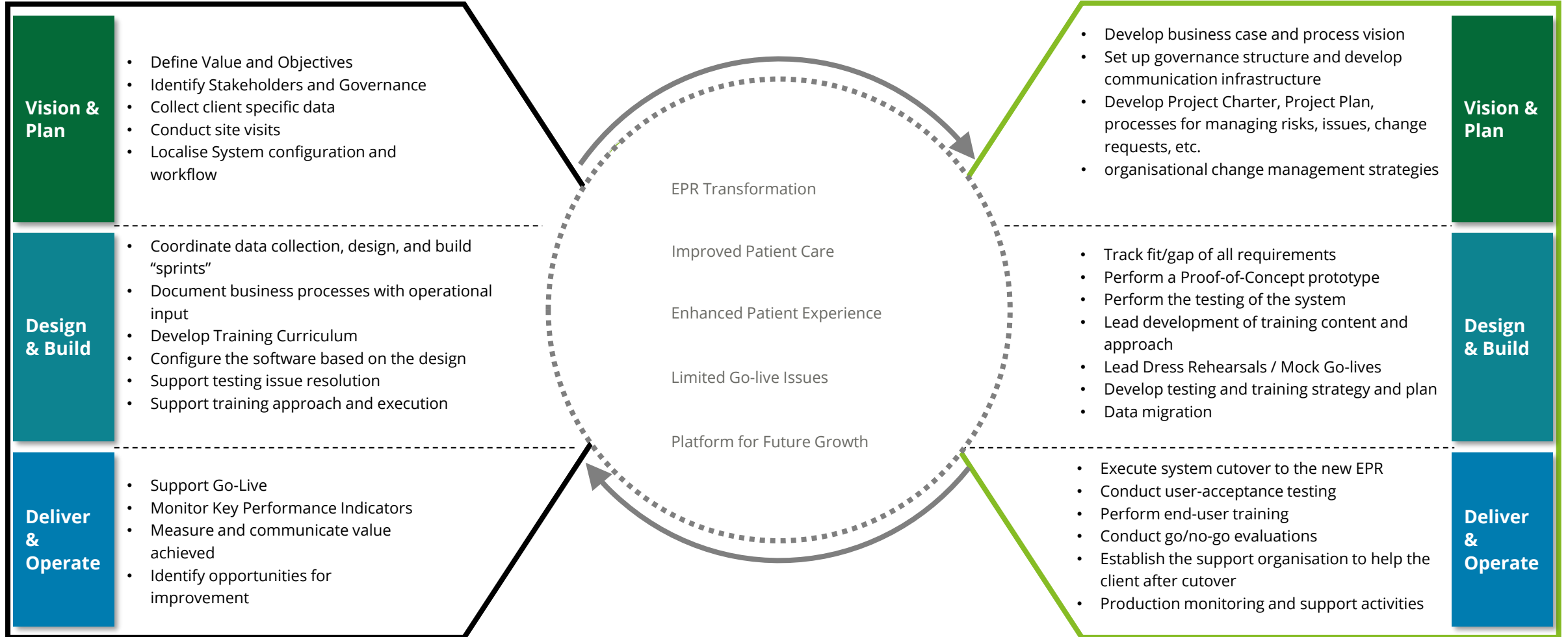
The Big Picture

Trusts and Partners work with major EPR vendors for implementations using leading practices

EPR Vendor

Implementation Goals

Trust/Partner



Setting the Foundation: Governance, Guiding Principles, and Effective Decision Making

Setting a strong foundation from the beginning enhances overall outcomes and Programme success

Governance

A well-structured governance model helps ensure decisions are made at the right level, by the right stakeholders, at the right time

Guiding Principles

Establishing appropriate Guiding Principles sets the ground rules for system design and implementation, guides decisions, and keeps teams focused on overall goals, objectives, and the desired end state

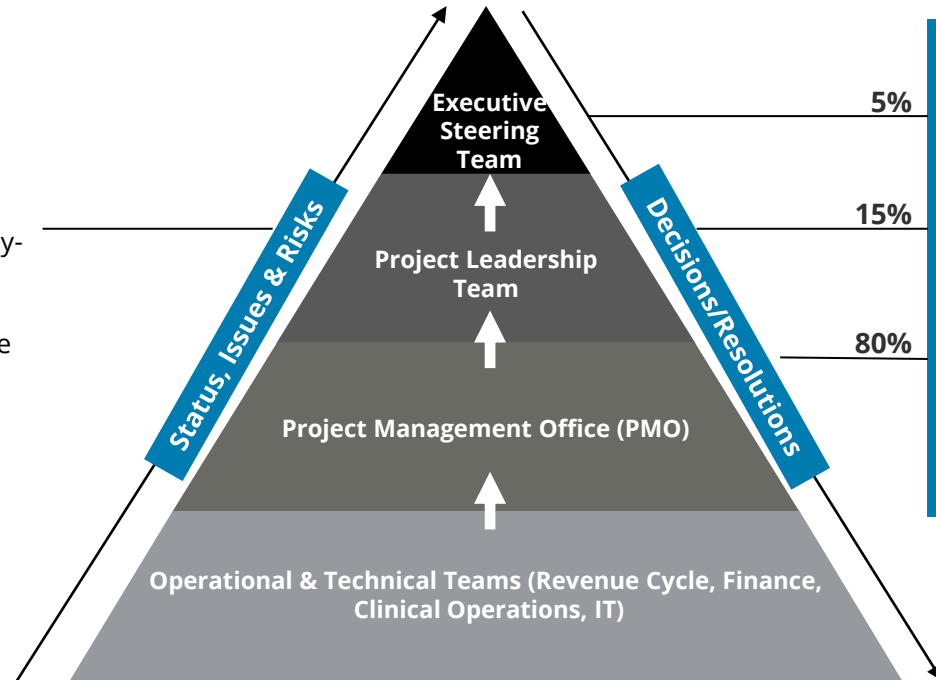
Effective Decision Making

Decisions that could potentially impact the programme timeline, cost, quality, safety and/or future-state operating model should be escalated to programme and clinical governance



Establish Leadership Support

Leadership support and buy-in is cultivated from the very beginning of the Programme



Key Success Factors

- Timely decisions that are efficiently communicated
- Membership provides representation of the collective voice of the organisation
- Steering committee members are vocal change advocates

Guiding Principles

- Proactive issue management
- Forward-looking risk management
- Leverage standard functionality
- Timely decision-making
- Adherence to project processes and procedures

Importance of Governance, Guiding Principles and Effective Decision Making



1 Commitment from key stakeholders



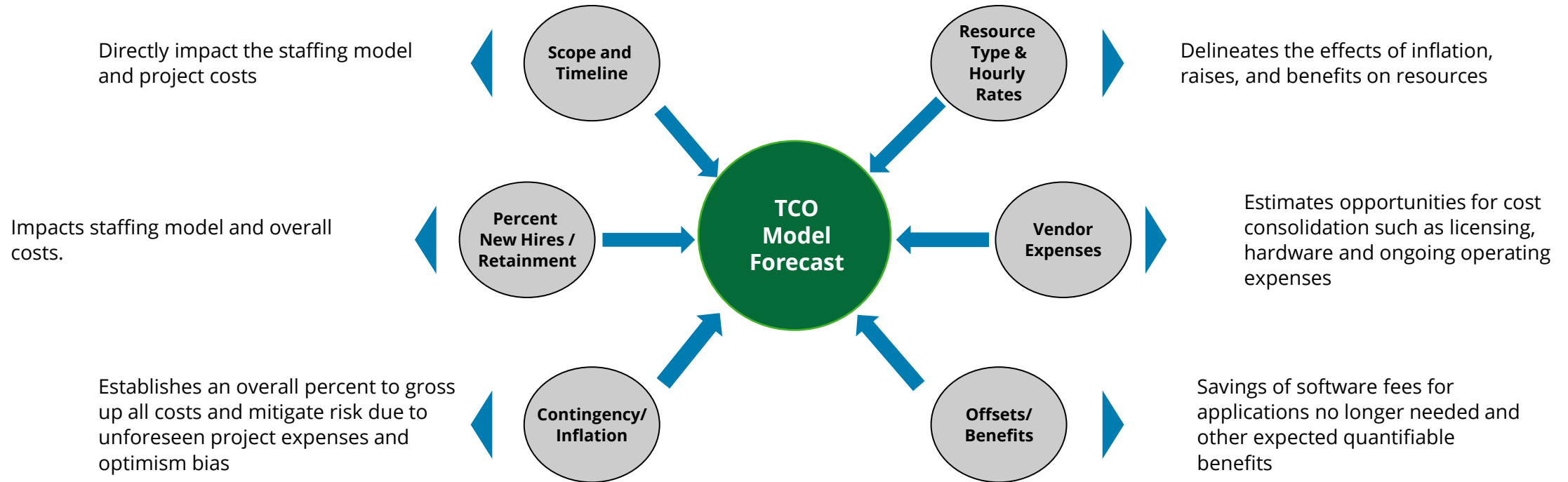
2 Align direction



3 Better decisions

Total Cost of Ownership (TCO)

As a component of the overall business case, a TCO model can be built to estimate overall capital and operating expenses for leadership to make an informed decision. More mature organisations will identify both quantitative and qualitative benefits



Importance of TCO

1 Build a strong business case

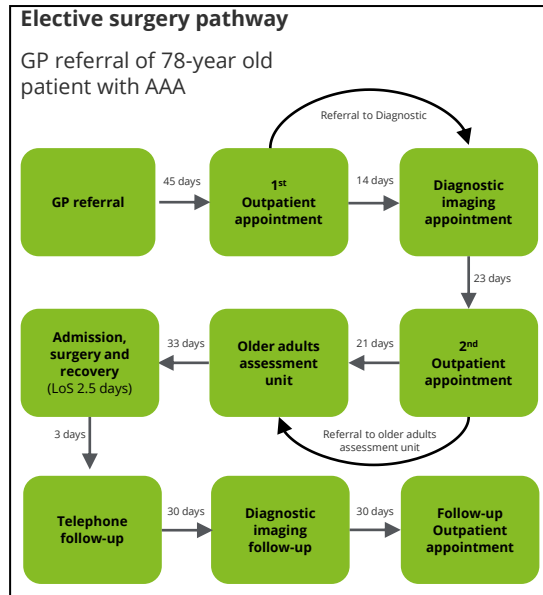
2 Make strategic, data driven decisions

3 Communicate capital and operational funding requirements to the Board

Strategies for Clinical Design

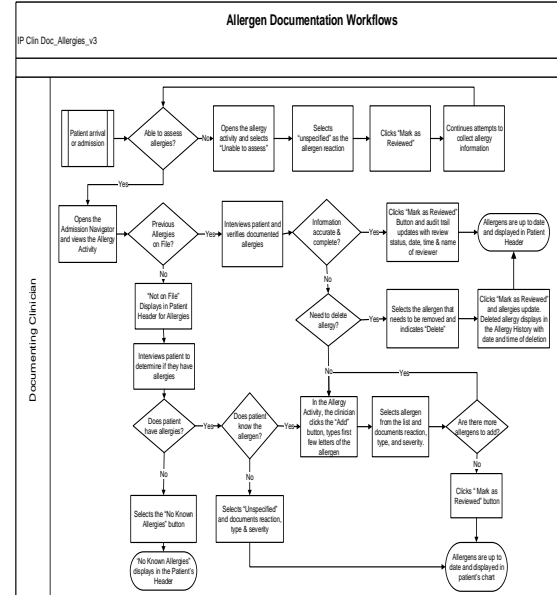
Clinical Design develops the sum of all non-patient specific knowledge integrated into the EPR to enable the delivery, documentation and reporting of patient care.

Pathways



Optimises end to end patient pathways for specific conditions through an organisation or health system

Workflows



Optimises individual component activities of patient pathways, defining the workflow

Content (examples)

- ✓ Order Sets
- ✓ Clinic letters templates
- ✓ Discharge letter templates
- ✓ Results ranges
- ✓ Drug regimes
- ✓ Assessment tool (Waterlow)
- ✓ Problem lists
- ✓ Care planning tools

Provides the tools for clinicians to document care, incorporating clinical decision support and standardisation

Importance of Clinical Design

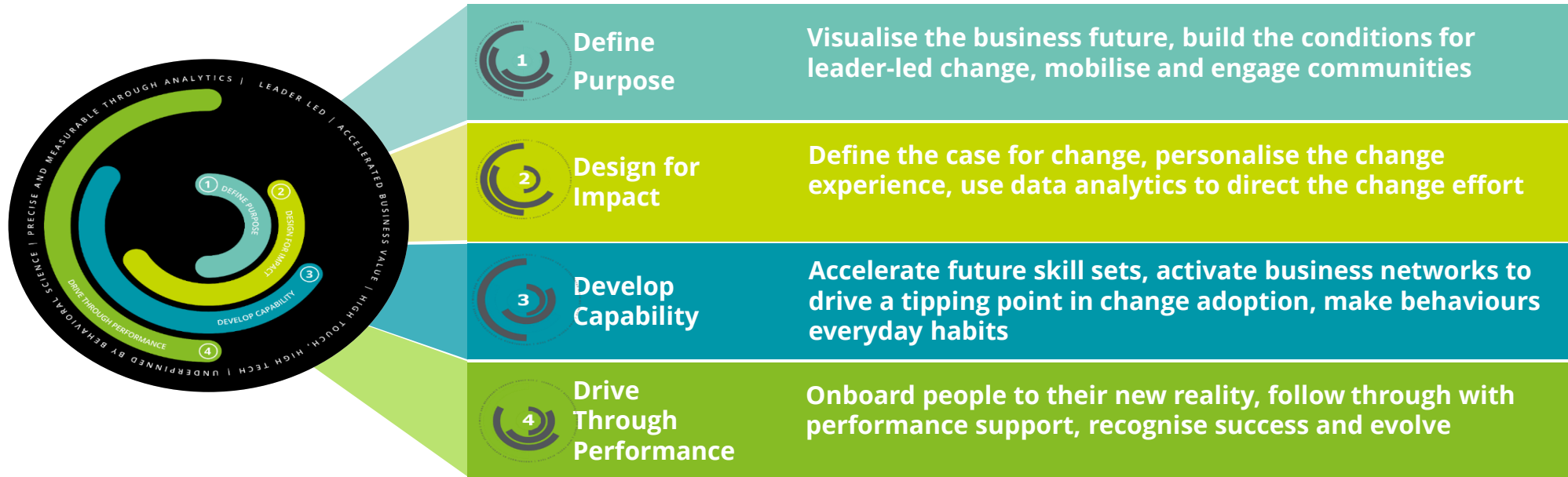
1 Deliver high quality patient care

2 Improve standards and consistency

3 Build efficient clinical workflows

Strategies for Change Management

Four Essential Elements guide your organisation's transformation



Expected Value for Each Essential Element

Define Purpose	Design for Impact	Develop Capability	Drive Through Performance
<ul style="list-style-type: none"> • Clear need for change and sense of urgency • Articulated benefits & impacts • Alignment of leaders • Engagement with key communities 	<ul style="list-style-type: none"> • A comprehensive change roadmap, using data • Identification and mitigation of key risks • Defined process to shape culture 	<ul style="list-style-type: none"> • Business networks are equipped to drive the change agenda. • People introduced to new roles, skills and behaviours • Learning drives individualised ways of learning 	<ul style="list-style-type: none"> • Everyone working in the new way • People feel empowered and able to adapt • Tools and accelerators ensure successful transformation

Importance of Change Management

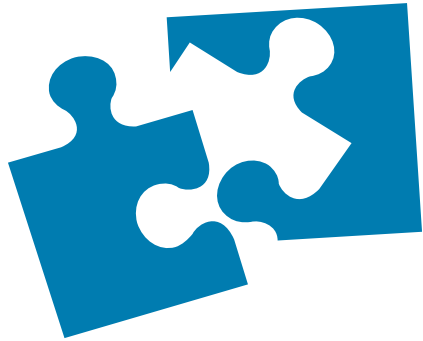
1 Establish buy-in from key stakeholders

2 Highlight impact of changes

3 Drive adoption throughout the organisation

Strategies for Training

End users will need to learn how to use the new system. Effective training will maximise the investment made in the implementation



Vision and Objectives

The goals and objectives of the training strategy to guide activities throughout the project

What We Know

Understanding end user needs, desires, and lessons learnt from other training efforts

Team Structure

High level outline of team structure, roles, and responsibilities

Content Development

Approach to designing curricula, lesson plans, delivery method, curriculum build, review process, materials, etc.

Credentialing Approach

Approach to recruit, hire, onboard and credential contract trainers to deliver end user training

Training Logistics

Approach to scheduling, registration and reporting on end user classroom training

Deployment & Delivery

Leverage hub-based and instructor-led approach with support from Super Users and At-The-Elbow resources

Importance of Training Strategy



Enhance user comfort in new system



Effectively coordinate content development, trainers, and trainees



Enable end users to 'hit the ground running'

Strategies for Technology

Implementing a modern EPR solution requires an understanding of the underlying technologies to define a strategy addressing several key areas.

Infrastructure and IT Assets	The architecture, hardware, software, and environment hosting supporting the organisations IT vision and strategy.
Devices (Biomedical & End User)	Biomedical and end-user device procurement, installation, and maintenance in addition to peripheral devices to support the EPR implementation.
Security	The application security strategy involves the plan to design, develop, implement, and test security controls for deployed applications.
Interoperability (Interfaces/APIs/MDIs)	The exchange of data from EPR to/from ancillary systems, vendors, devices, downstream systems, etc. and between hospitals/clinics MDI bridges the data gap between bedside medical devices and EPRs.
Historical Data Conversion	The pre-loading of patient data (e.g., allergies, problems, notes, etc.) from legacy and paper sources to new EPR.
Change Control/Release Management	The setup, maintenance and management of data across EPR environments e.g., Development, Test, Production, Training.
BI and Reporting	The use of EPR data for operational/analytical reporting and to support development of business intelligence and data warehousing.
Downtime Planning	The preparations required to ensure the operational and technical readiness in case of EPR down time.



Core Technology enables a **Digital Future**



- Patient engagement**
- Communication & coordination**
- Data-led care**
- Operational efficiency & productivity**
- Emerging technologies**

Importance of Technology Strategy



1 Provide core technical infrastructure and functionality



2 Enable integration between core and third-party systems



3 Assist in a smooth transition of data from legacy systems

Strategies for Testing

A critical aspect of any EPR Implementation is the adequate testing of the new system to ensure that it will perform as expected and meet defined quality standards

Testing Approach and Scope

Types of Testing



Approach and Methodology

- Are there organisational testing practices, standards and tools that can be leveraged and/or adapted for the EPR implementation?
- What is the EPR vendor's testing approach and how does it differ from our best practices?
- How do we determine what needs to be tested?
- What are the acceptable conditions to move from one testing phase to the next?



Scope/Timeline

- What is the functional footprint of the EPR implementation? What legacy systems and how many will be replaced?
- What is the scope of testing? Does it include Volume, Stress Testing?
- Based on the overall project timeline, when can testing begin? How will testing be phased? How many cycles of testing will be adequate for each phase?



Staffing and Resources

- How is the Testing Team structured? How many resources are required to staff?
- What is the testing team responsible for (e.g., test execution, coordination, both)?
- What skills, experience, and/or expertise is needed for testing roles?
- What roles do SMEs, end-users and other stakeholders take in the testing process?

Functional Validations

Application Testing
Interfaces Testing
Integration Testing
Parallel Revenue Cycle Testing
User Acceptance Testing
API and Web Services Testing
Regression Testing

Volume Validations

Mapped Record Testing
Conversion Testing
Access/Scheduling Testing
Clinical Focused Testing
Claims testing

Importance of Testing Strategy



Reduce overall implementation risk



Surface issues and risks early for effective resolution



Improves adoption with User Acceptance Testing

Case Study

Case Study | Convergence at Large US Midwest Healthcare System

Our client sought to replace 274 disparate legacy systems with one centralised system, with more than 60,000 end users experiencing changes to their daily roles. This left leadership at all sites looking for a solution to promote success across multiple dimensions, from patient safety to revenue stability, through a capable and self-assured workforce. The resulting implementation marks the first time in the organisation's history they were able to truly operate as an enterprise from both an IT and clinical perspective.

Results

- Established governance framework to engage stakeholders across four regions
- Consolidated 274 disparate legacy systems
- Collaborated with application teams comprised primarily of contractors and a client team with more than 500 resources
- Executed four successful go-lives over five years
- Converged and standardised clinical and revenue cycle practice, policy, and process
- Returned to operating baseline within a week of medical center go-live

Lessons Learnt

- Drive convergence from bottom up and top down
- Departments and specialties that invested time in readiness activities were significantly better prepared for go-live
- Ensure any customisation aligns with transformation goals and assess potential impacts on scope, resources, timeline, and maintenance

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Services

Health System Reform

- System Innovation
- Integrated Care
- Commissioning for Value
- New Organisational Forms

Organisational Improvement

- Performance Improvement
- Avoiding Financial Crisis
- Insight Driven Organisations

Enabling Capabilities

- Fit for Future Estate
- Connected Care
- Modern Well Led Workforce



The future unmasked

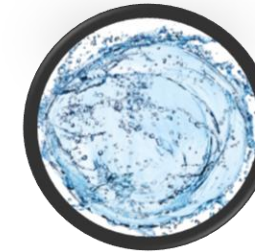
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Key trends in agency, virtual health, remote monitoring, and data-sharing

Closing the digital gap: Shaping the future of UK healthcare



2021 Global Health Care Outlook

Accelerating industry change

Unlocking potential

Smart Health Care Solutions



Improving care and creating efficiencies

Are physicians ready to embrace digital technologies now?

Q&A





Join us for our next webinar...

Clinical Workflow Design and Content

Wednesday 31st March

4:00 – 5:00 pm BST



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