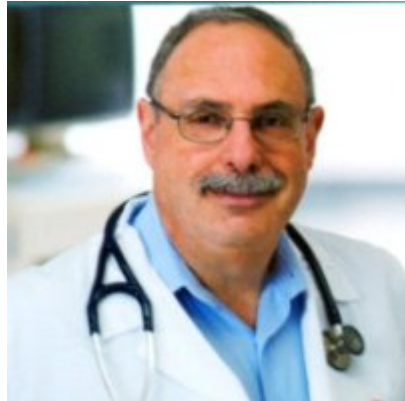# An Epic Journey

Epic Wave 3 Readiness

March – October 2018

Presented by -

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& Beth Reed

About the Presenters

Joseph Stein, MD

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Inpatient Epic

Clinical Cardiology, Cardiac
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Critical Care Medicine

David Wetherhold, MD

Executive Medical Director
Ambulatory Epic

Chief Division of Internal Medicine
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Agenda

- Epic Outreach Goals & Services

- Key Issues for Offices
  - Access Options & Strategies
  - Epic Case Scheduling
  - Charge Capture

- Wave 3 Outreach
  - Process & Timeline
  - Access Agreements
  - Training
  - Epic Outreach Points of Contact

- Town Halls

Epic Wave 3 Outreach GOAL

The Epic Outreach Program: Assist Independent Physicians with Epic Wave 3 Readiness

- **Communication** – stay informed of choices, timelines, opportunities

- **Support** – individual Physician and Office Manager

- **Liaison** – contact for: Training, Super Users, Data Verification, Security Login-IDs, Access, Device Readiness and Activation Support

- **Leverage** – partnerships with established Physician Groups

Outreach Readiness Services

Epic Access

- Physician
- Office Staff
- Billing
- Access contract (office staff only)
- Non-employee Access Request Forms

Training

Physician
- eLearning
- Classroom
- Personalization
- Practice Labs

Staff
- eLearning or
- Classroom

Local Classrooms!

Charge Capture / Reporting

- Epic Standard Charge Capture reports can be emailed to Scripps email
- Scripps will **not** process your practice billing
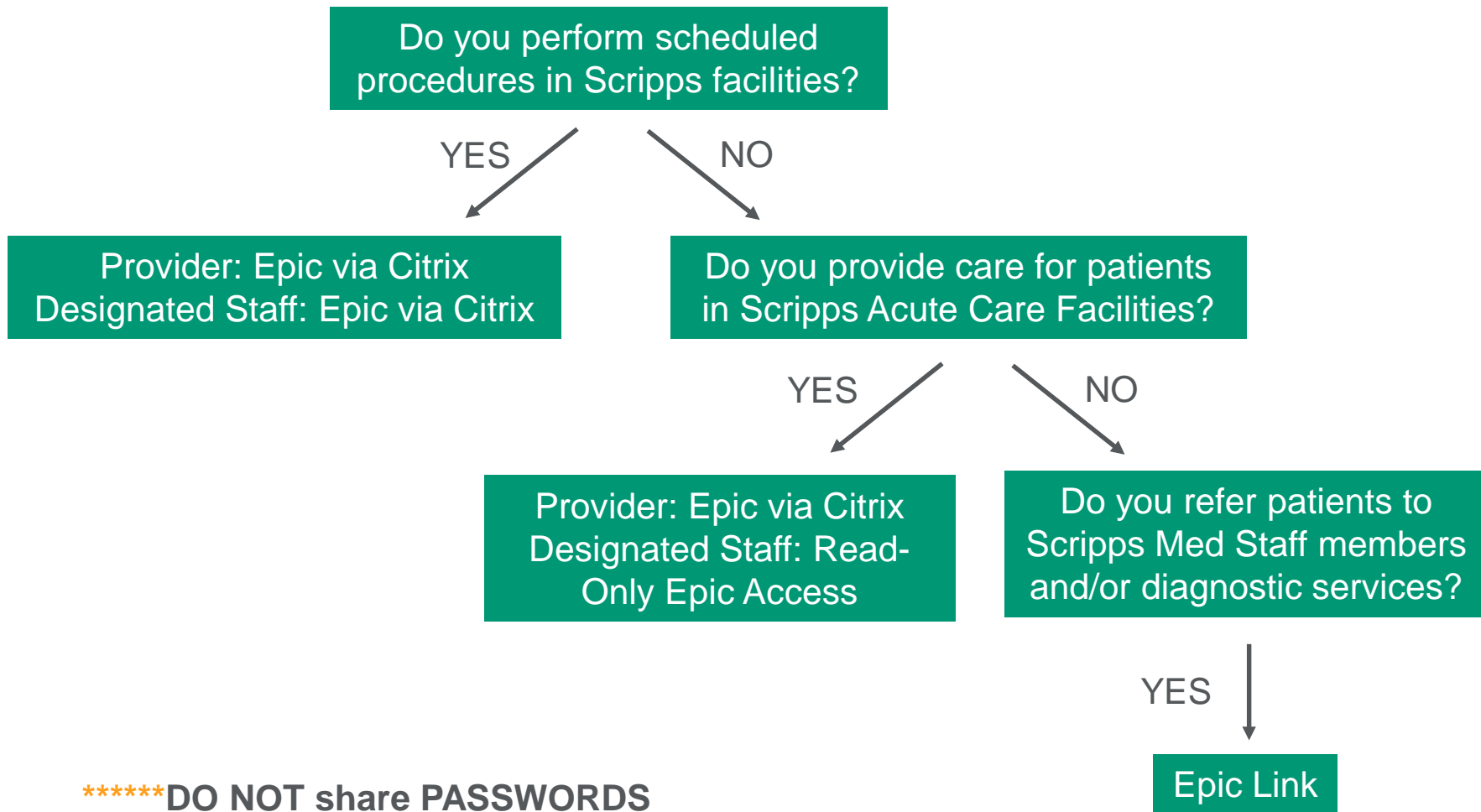- Third party billing companies will need a separate Epic agreement

Devices

- Specifications for Epic access
- 24-inch monitors recommended
- Personal devices
- High speed internet connection
- Printing

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Accessing Epic from MD Office

	Epic View Only	Epic Link	Epic via Citrix	Epic Connect
Results	✓	✓	✓	✓
Orders	Ø	Ambulatory & Referrals	Inpt/Outpt as at Hosp.	All
PeriOp	Ø	Ø	✓	✓
Document	Ø	Ø Scan; 2018 - PDF	Hospital	All
Training	eLearn	eLearn	½ day	6-12+ hours
When	Now	Now	Wave 2-3	Rollout starts late 2018
Cost	Ø	Ø	Ø	Scripps ACO Subsidized Subscription

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Epic Access in Independent Physician Offices

Do you perform scheduled procedures in Scripps facilities?

YES → Provider: Epic via Citrix
Designated Staff: Epic via Citrix

NO → Do you provide care for patients in Scripps Acute Care Facilities?

YES → Provider: Epic via Citrix
Designated Staff: Read-Only Epic Access

NO → Do you refer patients to Scripps Med Staff members and/or diagnostic services?

YES → Epic Link

******DO NOT share PASSWORDS

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- Carequality and Sequoia Project
    - Common interoperability framework
    - Vendor-neutral collaboration of healthcare community
    - Link data sharing networks via
        - Provider organizations
        - Pharmacy, imaging, lab organizations
        - Select EHR vendors
    - Continuity of Care Document (CCD)
        - Allergies, Problems, Procedures, Medications, Results, etc.

Epic Wave 3 Outreach by Physician Partners

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Readiness Outreach Approach & Timeline

March > through > July 2018

Meet and greet with practice office manager

Designate a practice office lead

Meet physician lead, review practice verification questionnaire

Interaction for Preparations, Status Report Access Agreements for Office Staff, Training Registration

Monthly Town Hall meetings for practice office leads, alignment, knowledge-sharing, Q&A

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Epic Outreach Process - Practice Assessment

To plan this transition, we are conducting a Practice Verification Questionnaire to gain mutual understanding of your private practice needs

- Update physician demographics

- Verifying NPI, SPI, DEA numbers, etc.

- Office, clinical, and specialty needs

- Epic access for office staff

- Epic training for office staff

- Charge capture options for office billing

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Epic Outreach Process

Designated Office Expert:

- Review Scripps Access Agreement
- Request office end-user IDs
- Notify Scripps of change in personnel, terminations
- Work with Scripps on network and access policy compliance
- Primary liaison and/or super-user to support understanding of Epic, access, and its use
- Immediate notification to Scripps Service Desk (858-678-7500) of any data breaches of protected health information, legal requirements for disclosure

Epic Case Scheduling

Goal:

Develop the process and workflow for independent physician offices to schedule cases and enter pre-operative orders at Scripps. This includes OR, Hospital ASC, Endoscopy, Interventional Cardiology, and OB.

Requirements:

- Office staff agreement signed
- Completion of training / proficiency
- Ongoing maintenance for access

Epic Case Scheduling

Provider office staff access includes:

- View their physician's schedule using multi-provider schedule

- View the snap board and see surgeon block time (if applicable) on the schedule

- Use case entry to update case information

- Patient lookup

- InBasket to communicate case information and registration information with Scripps

- Use order entry to place a case request, PSE, and pre-op orders using a saved OrderSet

Epic Case Scheduling - Training Requirements

Office staff training for entering case requests:

Required for office staff who currently submit case requests for surgery or procedures at *Scripps Mercy Hospital San Diego* and *Scripps Mercy Hospital Chula Vista*.

- 4 hours of in-person, interactive classroom training
- Registration REQUIRED (begins in August, and needs to be completed by early September)
- Evenings / weekends / during business hours available
- Requires successful completion of posttest

Physician Readiness Checklist

- ✓ Readiness office manager / office lead tasks complete

- ✓ Super user selection and early training

- ✓ Physician and staff enrollment and training complete

- ✓ Charge capture readiness tasks complete

- ✓ Confirm device readiness tasks complete

- ✓ Encourage Epic practice sessions, login days and skills checks

- ✓ Participation in Workflow and dress rehearsals

Town Hall Schedule

Scripps Mercy Hospital San Diego, West Auditorium (Lower Level)

- Thursday, May 3 (5:30 – 7:30 PM)
- Friday, May 11 (noon – 1 PM)
- Friday, June 8 (noon – 1 PM)
- Thursday, July 12 (noon – 1 PM)
- Thursday, August 16 (noon – 1 PM)
- Thursday, September 6 (noon – 1 PM)

Scripps Mercy Hospital Chula Vista, 495 H Street Conference Room

- Friday, March 16 (noon – 1 PM)
- Friday, June 1 (noon – 1 PM)
- Friday, August 17 (noon – 1 PM)

(Click to Download)

Frequently Asked Questions

Scripps Epic Electronic Health Record for physicians and office staff

About Epic

WHAT IS EPIC?

Epic is an integrated electronic health record (EHR) and revenue cycle system which is replacing Scripps' ambulatory and inpatient EHR and revenue cycle management systems. Having one system for all of these functions will allow Scripps to provide seamless, integrated care for our patients across the system and streamlined workflows for our employees and physicians.

WHEN IS SCRIPPS MAKING THE CHANGE TO EPIC?

Epic was successfully activated during Wave 1 at Scripps Green Hospital, Scripps Clinic, Scripps Coastal Medical Center and Mercy Clinic in April 2017. Scripps Encinitas, Scripps La Jolla and the Scripps Mercy campuses in Chula Vista and San Diego will be activated in the coming waves in 2018. Epic Community Connect will offer some independent offices an ambulatory EHR with full integration. This initiative will launch in late 2018.

WHY IS SCRIPPS CHANGING TO EPIC?

Scripps is implementing Epic to support improved patient care, clinical outcomes and efficiency. This new single, integrated EHR will enable our physicians and staff to make quality patient care decisions, and allow for seamless care wherever and whenever a patient chooses Scripps.

Epic for my office

AS A PHYSICIAN, HOW CAN I ACCESS INFORMATION ABOUT PATIENT CARE IN EPIC FROM MY OFFICE?

Based upon the level in which you interact with a Scripps hospital that is going live, we have the right type of Epic access to suit your needs:

Epic via remote access – Physicians who have been trained in the full use of Epic during a hospital activation can access Epic in the hospital or remotely by Citrix Web Access, or through an app for Android phone, iPhone (Haiku) or iPad (Canto).

Epic view-only access – View-only access is available to all Scripps providers with admitting privileges to any Scripps hospital and who have not undergone training to use Scripps Epic system. This access allows you to view patient information, but does not allow you to alter it. The Scripps Physician Learning Management System offers education on how to use view-only access at https://scripps.learn.taleo.net.

Epic Community Connect – Community Connect offers independent physicians an ambulatory EHR with full integration into the Scripps Epic system. Community Connect is scheduled to launch in late 2018.

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Scripps Mercy
PHYSICIAN PARTNERS

WILL MY USERNAME AND PASSWORD BE THE SAME? IF NOT, HOW DO I GET A NEW ONE?

Your username (corporate ID #) and password will remain the same; however, your access to Epic will not be activated until you complete training. After class you will have access to the Playground – a simple copy of Epic that resets each night – so one can experiment freely and not break anything. During personalization labs, templates are created in the real production environment. Limited access continues to be offered in order to work on order sets until go-live when full features are enabled. Note: View-only access is available now with your current password.

HOW CAN MY OFFICE STAFF ACCESS EPIC?

To use Epic, office staff must sign an agreement and be trained. Three access levels are available, depending on the clinical and business needs. View-only access allows chart review and printing. If staff need to enter outpatient orders and referrals, the Epic platform provides EpicCare Link. To schedule surgery and procedures, and enter pre-op or pre-procedure orders, full Epic (through Citrix) can be used from the office. Orders will be entered using a "second sign" process, where they are forwarded to the physician for review and signature. Training depends on the level of access and capabilities needed. The process of scheduling and entering pre-op orders in Epic is designed to reduce the burden of transmitting information to Scripps. Using Epic will ensure orders, tests results and case information are available when patients present to Scripps facilities.

WILL STAFF HAVE THEIR OWN USERNAME AND PASSWORD OR WILL WE USE OUR DOCTOR'S?

Each person who uses Epic will have his or her own username and password. Physicians must never share their access with staff because the physician security class allows much wider access and accepts full responsibility for orders entered, which become active when signed.

CAN I STILL GET REPORTS FROM THE HOSPITAL?

Reports and results can continue to be delivered by fax. If a hard copy is not needed, view-only access will display information. Scripps strongly recommends using EpicCare Link as the most streamlined and secure way to receive results. There is no direct interface to non-Epic office EHRs, but Scripps supports health information exchange through San Diego Health Exchange, Care Everywhere and Sequoia Project.

HOW DOES THE OFFICE USE EPIC TO SCHEDULE TESTS OR PROCEDURES?

For outpatient procedures, EpicCare Link can be used. To schedule cardiac cath/EP labs, endoscopy or ORs, full Epic via Citrix is needed.

HOW WILL THE OFFICE GET INFORMATION FROM THE HOSPITAL FOR BILLING?

Reports may be obtained as above. Most offices have a manual process for charge capture. Although that could continue to be used, charges can be captured in Epic as documentation is completed. All professional charges for Scripps Medical Foundation (Scripps Clinic & Scripps Coastal) physicians are now entered this way.

The goal is to support office billing or third-party billing with the following options:

- Continue to utilize existing processes to record charging information
- Send a nightly report with charges (several common formats and vendors are supported)
- Provide access to Epic (view-only or Epic Care Link for biller)

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Scripps Mercy
PHYSICIAN PARTNERS

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Outreach Points of Contact

Please reach out to a representative at Scripps Mercy Physician Partners if you have any questions.

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Thank you for attending today's webinar!