CareForum 2022

The WellSky® Conference

Extending your Epic Investment:

How to optimize your EMR for success

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Today's speakers

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CarePort, powered by Wellsky

Agenda

- Defining your outcomes
- Clinician-centric workflows
- Downstream effects
- Change management

The specialization vs. diversity challenge

Application Specialization

Increasing specialization

- **The 'Transfer Center' Example**
  - **THEN:** Record Transferring facility information and sending physician if available
  - **NOW:** Create structure and Processes for the management of Transfers and affiliated bed placement(s)
- **The 'Post-Acute' Referral & Placement Example**
  - **THEN:** Record Disposition, Destination, Responsible Agency
  - **NOW:** Manage / Facilitate the entire post-acute referral and placement process

Application Diversity

Increasing Diversity in Use-Cases and Necessary Applications across the hospital ecosystem

- HIE / Information Exchanges, E-Faxing, Portals
- Bed Management, Post-Acute Referral tools, Patient Choice facilitation, Network management resources, etc!

Gaps & challenges in today's EHR

Pace of Change

- Time to Absorb/Adopt changes in your system

To Upgrade or Customize?

- Technical Debt Backlog
- Whack-a-mole solution fixes
- Solving today's problem or thoughtful future design

True Workflow: Solution Orientation

- Over-Generalized information
- Too Many Notes

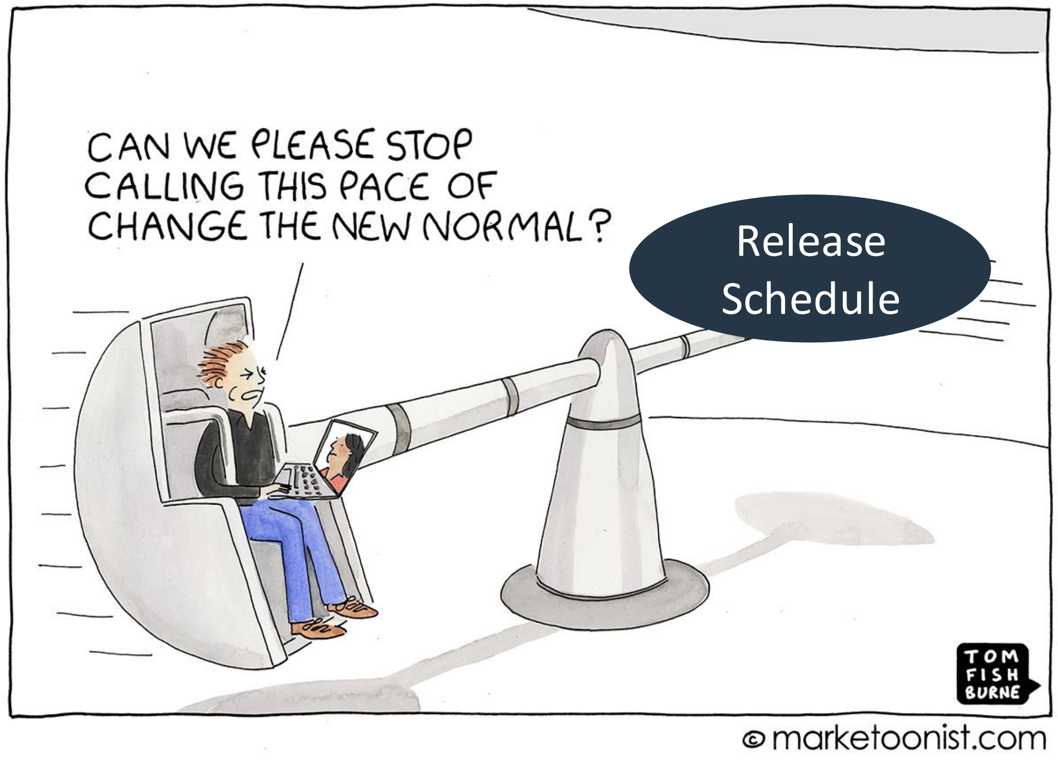
Jumping Across the Silo's

One Platform? Or 37 platforms with one login screen?
Effective Information Distribution & sharing

Why would a redesign be right for you?

When….

- Regulations change or no longer fit workflow
- Customization has overtaken your ability to regularly upgrade
- Everyone says ‘no one can see your documentation’
- Documentation no longer serves a purpose, staff see too many fields and don’t know the point
- Staff are double documenting > visiting with patients
- You are unable to implement an add-on product, or effectively interface
- One more ‘little fix’ puts your relationship with the CIO in jeopardy



Designing with the clinician in mind

The 5 R's of clinical decision support

The 5 Rights:

The Right **information**

To the Right **people** *(The clinician working or someone downstream)*

Through the Right **channels** *(Pop ups, EHR, mobile notifications)*

In the Right **form** *(notes/flowsheets/dashboards)*

At the Right **time** *(Only when a decision or action is needed)*

Workflows with clinicians in mind

Think about Timing

- When will this assessment or questionnaire be applied
- Is it performed once or frequently
- Does the Final Answer matter, or does each answer matter distinctly
- Do you have a goal in mind for completing this process step?

Ensure intuitive choices and logical search

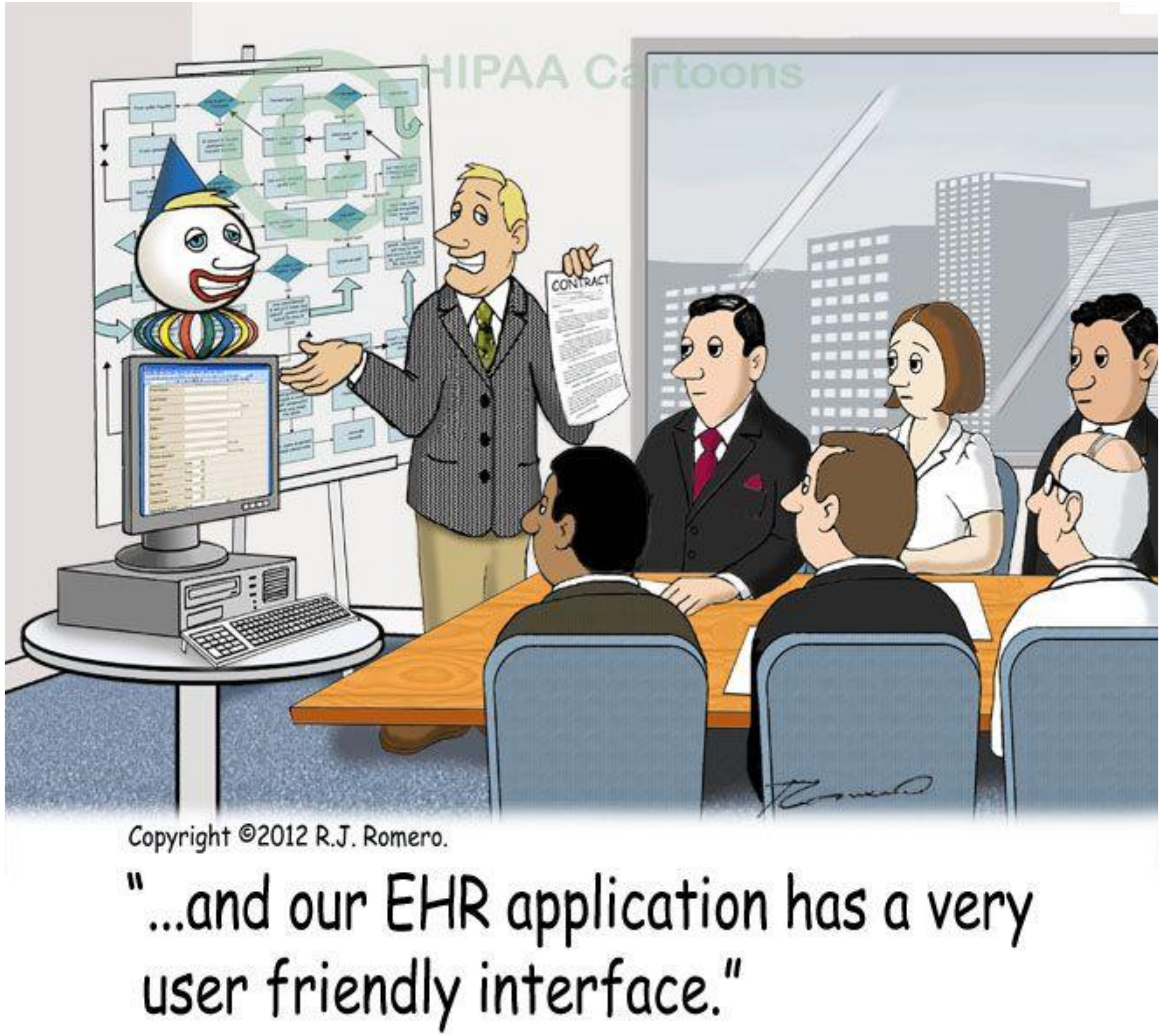
- We shouldn't be directing our folks to a search grid to inform the best selection
- Limit "other"

"Good news.
Your cholesterol has stayed the same,
but the research findings have changed."

Workflows with clinicians in mind

Ensure intuitive choices and logical search

- We shouldn’t be directing our folks to a search grid to inform the best selection
- Limit “other”
- Work for the clinician, not the other way around



Workflows with clinicians in mind

- What do I want 'WHO' to see
  - What information do I want **the doctor** to see
  - What information do I want **the primary nurse** to see
  - What information do I want **the Post-Acute Agency** to see
- Is information structured such that a 'call to action' or 'request' is CLEAR?
  - Is it CLEAR what I want **the doctor** to 'do' and when I want them to do it?
  - Is it CLEAR what I want **the Nurse** to 'do' and when I want them to do it?

Start with your goal in mind

How do you design for success?

How will you measure success?

- Balance Process Measurement with Tracking Desired Outcomes

Database design is a component of workflow enhancement

- Ensure information is where you expect it to be, so the right users can run the reports and store in accessible places

Ensure Design will deliver on reporting goals

- Balance structured data fields with notes
- As you design, consider who you’re informing

Reporting is a Design Requirement

- Your design choices impact Reporting
- Outline what reporting you want to achieve with this upgrade
- What reporting or tracking can you do away with

Does your technology work for you or do you work for it?

CarePort Transition is designed with clinicians in mind,
Can your Discharge Planning Tool say the same?

End user experience

Designed for clinicians by clinicians, Transition is a new take on discharge planning and referral management – We worked with real users to understand what makes their life easier and ensured that clinicians were involved in the process from start to finish

- Designed with Users in mind: Easy to learn, easier to use

- Designed with Hospital Operations in mind: Easy to install and maintain

- Designed with reporting in mind: Making it easy to get the data where you need it

Streamlining processes to enable clinicians to be clinicians

Right Information:

- Users should always have access to real-time information without having to do extra steps
- Software should make lives easier by reducing noise and making it easy to see everything in one place

Right people:

- Workflows should take place where your users are
- Our solutions work from within the patient chart making it easy for the entire care team to see

Right Channels:

- One place for everything, do away with having to open extra applications
- Information should be shared where its needed – send it back to the EMR so that the next person in line can see it

Right Format:

- You work in your EMR, why duplicate the information in another silo? We want our tools to be intuitive for your users without having to learn 2 systems and without having to double document

Right Time:

- Users can't be expected to monitor multiple systems for updates, put everything in one place so there's no delay
- Your EMR is powerful, you should be able to use it to tell users when somethings missing

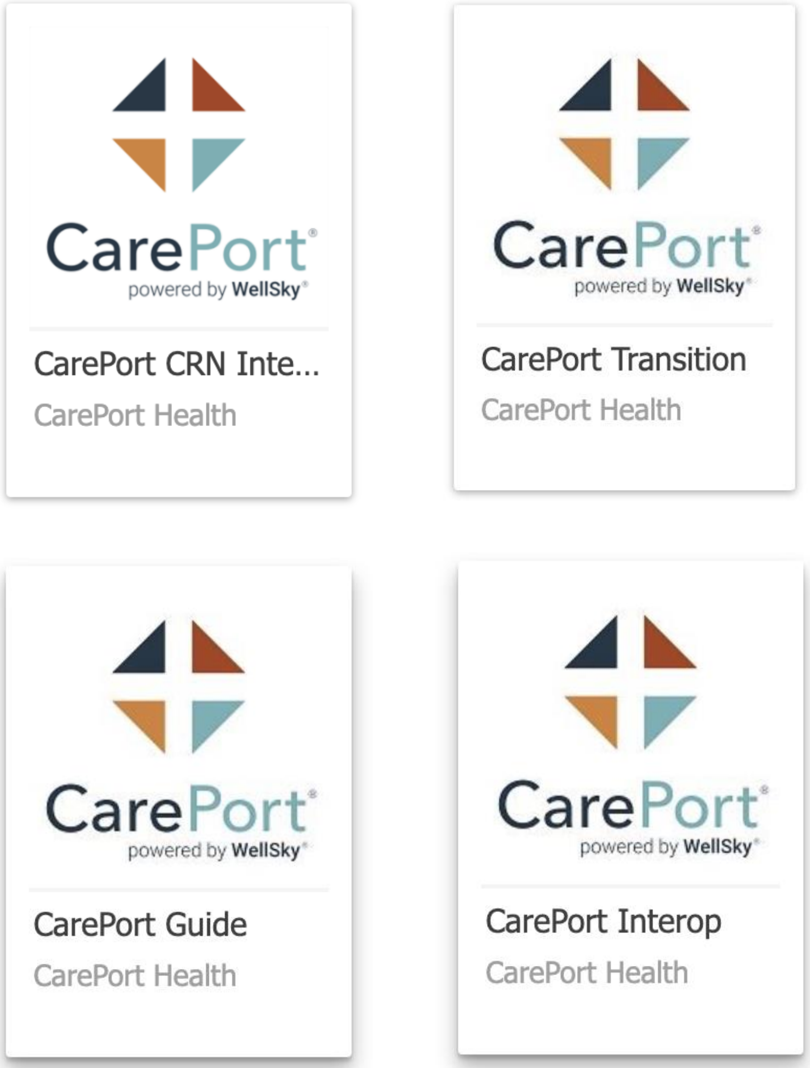
We want our solutions to be easy to install and easy to maintain…

- We’ve worked with Epic to list our solutions on the App Market (aka App Orchard) so you can get started with a couple of clicks from a trusted source

- Maintenance is easy: One less thing to worry about for upgrades - See when an epic update will affect your workflows with your usual upgrade notes.

- Use staff you already have: Epic teams can easily maintain your integration and workflow specific configuration can be set using a web site

- Turbocharger packages from Epic facilitate setup by building all the required records with just a few clicks



Your Data should be Accessible

Data silos:

Your reports on your terms:

- Reports can be run from within our solutions, but we also share key information back to the flowsheets allowing you to use whatever tools you need (Reporting workbench, Radar, Clarity, etc)
- We can deliver flat file extracts of all your information so it can be ingested wherever you need it

Making it so the end user can run reports:

- When the data is fragmented across multiple places it becomes difficult for users to get the information they want in real time
- We've designed our solution with your clinicians in mind making it easy to run reports with whatever tools you use

Decision Support:

Use your EMR to its fullest extent and make your users lives easier in the process

- Keeping patient information in one place lets your Case Managers, Social workers, and the rest of the care team in sync with fewer phone calls
- Putting data in the chart lets you design tools to support your workflows such as patient lists, print groups, columns, and alerts
- Staff make decisions based on what they can see, we want them to have the most up to date picture of their patient

Change Management

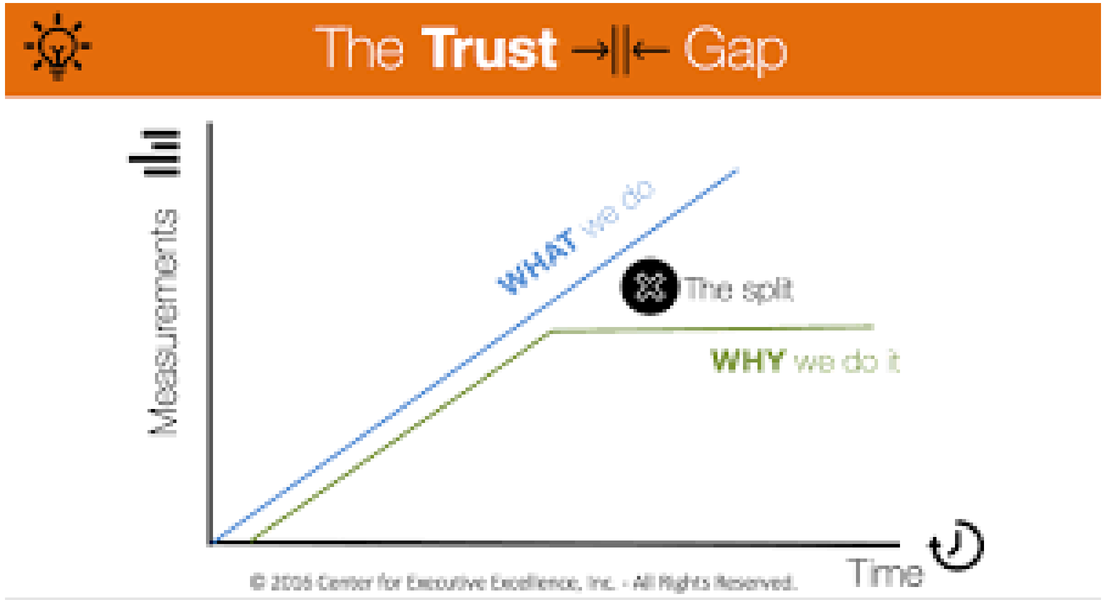
Staff Education

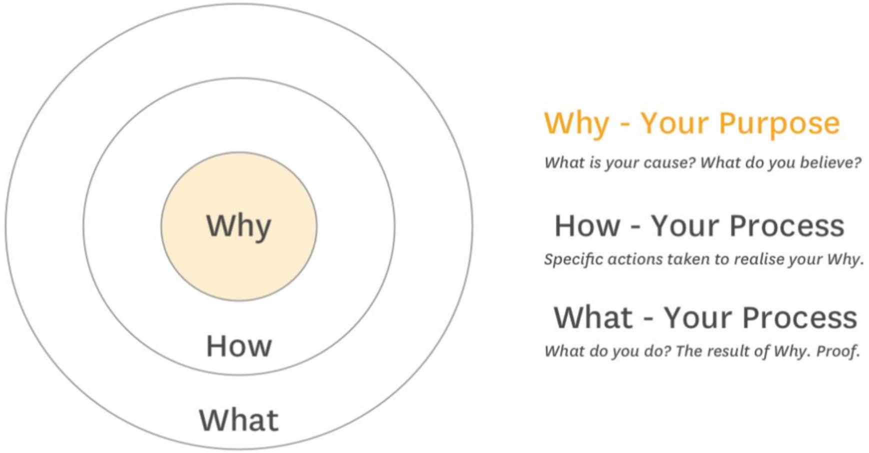
Design for Adoption (the Golden Circle approach)

- Start with **Why** – Remind the team of the core Purpose
- Ground the change in the **HOW** … will this change create impact
- Have a solid basis for Change that supports **'How'**
- Explain **What** needs to change, Be clear and concise

Stay Committed

- Check back on how the change is going
- Use process measurement to track adoption
- 'lead by example'





Measurable outcomes

Process Measurement

- Can you measure adherence to the new process
- Does a report exist that can deliver this information in a timely, logical manner?

Outcome Measurement

- What Outcome(s) will the change impact
- What extraneous factors may be impacting your Outcomes (positively or negatively)
- Do you have reporting, and data structures that support detailed exploration of process and outcome
- Can you explore your data to evaluate favorable and unfavorable results

A support structure that works for you

We support you with a dedicated 3-pronged customer success team, so you'll always recognize the folks you work with:

- **Client Success Manager:** An expert in our solutions who is there for whatever questions you may have. Your CSM will meet with your staff regularly and share important news and changes. They'll ensure that our solutions are working for you and help you escalate when things aren't quite right
- **Client Relationship Executive:** Your "Clinician on Demand", we're here to discuss your strategy, help you track it along the way, and discuss specific needs for your organization or offer best practices when dealing with regulatory burdens or workflow inefficiencies
- **Sales Executive:** a dedicated rep will work closely with you to ensure they know what you need and what you don't. Having sales as part of our client success framework ensures that everyone is on the same page, and makes contracting easy