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HIGH-LEVEL SUMMARY

UMass Memorial Health Care is pursuing a 2020 vision to become the best academic health system in America. Our providers and staff selected Epic as the best electronic health record (EHR) system to enable this quest.

KEY ACTIVITIES

⊙ **November**
- Current-State Assessments – Questionnaires Distributed by November 16
- Epic Project Team attends training at Epic

⊙ **December**
- Current-State Assessments – Site Visits December 14-18
- Epic Project Kick-Off on December 3

⊙ **January** Collaborative Design Sessions, week of January 11

⊙ **February** Collaborative Design Sessions, week of February 8

DEFINITIONS

Current-State Assessment: Includes Groundwork Questionnaires to be completed by each UMMHC entity followed by a Site Visit by the Epic Project Team and Epic staff to understand current-state workflows to help guide future-state design.

Collaborative Design Sessions: 500 sessions that will provide the opportunity for nearly 1,000 Subject Matter Experts from across UMass Memorial Health Care (UMMHC) to review the Epic foundation system and make decisions that will drive the configuration of Epic to best meet the needs of UMMHC.

EPIC DESIGN PARAMETERS

The Epic Executive Steering Committee is responsible for determining the 47 Epic Design Parameters (EDPs) that will guide the 500 Collaborative Design Sessions. The following EDPs have been approved so far by the committee:

⊙ **EDP 1:** UMMHC will have systemwide, standardized order sets with personalization capability

⊙ **EDP 2:** UMMHC will have a systemwide, standardized formulary

⊙ **EDP 3:** UMMHC will have systemwide, standardized workflows and content across all facilities

⊙ **EDP 4:** EDP 4: Leverage the Foundation System for clinical content and supplement with third-party vendors and/or existing UMMHC content. The following 2 of 5 decisions for EDP 4 have been approved.
  - Foundation system content will be used for electronic order set development
  - First Data Bank will be used for formulary content (e.g., allergens, medication dosing parameters)

⊙ **EDP 5:** All providers/staff who will use Epic will be required to complete training and demonstrate proficiency to gain system access

⊙ **EDP 6:** Entity leads will be responsible for monitoring success and profitability performance post-live.

⊙ **EDP 7:** All applicable current and future Epic modules will be implemented at all applicable UMMHC entities.

⊙ **EDP 9:** UMMHC will pursue HIMSS Analytics* Stage 6 within 60 days of go-live and pursue Stage 7 within 12 months post-live.

*Healthcare Information and Management Systems Society (HIMSS) Analytics is an industry advisory group that does market research across hospitals and ambulatory practices, to determine an organization's level of adoption and integration of their electronic health record system. There are seven stages, each with increasing capabilities and integration requirements.

Please note: EDP 8 regarding customer relationship management, is being further evaluated.

EPIC ENTITY LEADS ANNOUNCED

Entity leads are responsible for ensuring entity readiness and active resource engagement, as well as leading clinical and operational change.

⊙ **Clinton Hospital: Judy Thorpe,** VP of Patient Services

⊙ **Community Healthlink: Nicole Gagne,** EVP & COO

⊙ **HealthAlliance Hospital: Bob Dullea,** CIO & CVP of Facilities & Support Services

⊙ **Marlborough Hospital: Steve Roach,** President & CEO

⊙ **Medical Center: Jeff Smith,** MD, M.M.M., EVP & COO

⊙ **Medical Group: Bill Corbett,** MD, SVP, Community Practices, and **Steve Tosi,** MD, Chief Physician Executive & President

⊙ **Medical School: Greg Wolf,** CIO

⊙ **Revenue Cycle: Sergio Melgar,** EVP & CFO, UMMHC

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TALKING POINTS

EPIC EXECUTIVE STEERING COMMITTEE MEMBERS

Responsible for overall management of the program's scope, budget, timeline, benefits realization and plan.

- **William Corbett, MD,** Committee Co-Chair, SVP, Community Practices
- **Matthias Walz, MD,** Committee Co-Chair, Associate Chief Medical Officer & ACMO, UMMMC
- **Alice Shakman,** SVP, Operations, UMMMC
- **Deborah DeMarco, MD,** Senior Associate Dean for Clinical Affairs, Associate Dean for GME & Professor UMMS
- **Deborah Weymouth,** President & CEO, UMMHC HealthAlliance Hospital
- **Cathy Jewell,** CNO, UMMMC
- **Evan Bailey, MD,** Pediatric Pulmonary Faculty, UMMMG
- **Greg Wolf,** CIO, UMMS
- **Gregory Volturo, MD,** Chair, Department of Emergency Medicine, UMMMG
- **Jeff Smith, MD,** M.M.M., EVP & COO, UMMC
- **Jessica Simons, MD,** Assistant Professor, Vascular Surgery, UMMMG
- **Joanna Cain, MD,** Vice Chair, Faculty Development OB/GYN
- **John Salzberg,** Controller, Patient Access & Revenue Cycle, UMMMC
- **Joy Jacobson,** Revenue Controller, UMMMG
- **Katherine Luzuriaga, MD,** Professor, Molecular Medicine, Pediatrics & Medicine

- **Kim Robinson, MD,** MPH, Pulmonary Medicine, Critical Care
- **Pamela Manor, DNP, RN-BC, CNIO,** ACNO Clinical Informatics, Nursing Professional Development & Nursing Quality
- **Margaret Hudlin, MD,** SVP, CMO, CQO, UMMMC
- **Max Rosen, MD,** Chair, Department of Radiology, UMMMG
- **Nicole Gagne,** EVP & COO, UMMHC Community Healthlink
- **Richard Forster, MD,** Clinical Associate Professor of Medicine, Vice Chair for Graduate Medical Education, Chief for Division of Hospital Medicine, Program Director for Internal Medicine Residency
- **Richard Irwin, MD,** Chair, Critical Care Operations Committee, UMMMC
- **Robert Finberg, MD,** Chair, Department of Medicine, UMMMG
- **Sergio Melgar,** EVP & CFO, UMMHC
- **Stephen Tosi, MD,** Chief Physician Executive & President, UMMMG
- **Steve Erban, MD,** Division Chief of the Division of Clinical Informatics, UMMMG
- **Steve Roach,** President & CEO, UMMHC Marlborough Hospital
- **Thomas Scornavacca, DO,** Medical Director, Clinical Integration, UMMMG

EPIC PROJECT MILESTONES

10/01/17
Transition to Support & Optimization

12/15/16
UMMHC Content Configuration Complete

07/01/17
Go-Live #1
Med Center, Med Group, Clinton, Marlborough, Medical School Clinical Data Repository Interface, Academic EHR & Pop Health Modules

01/01/16
Planning Phase Done/Start Design & Build Phase

08/31/16
Design & Build Phase Done/Start Testing

12/01/16
Infrastructure Ready

03/31/17
Testing Done/Start Training

Specific Date TBD
Go-Live #2
HealthAlliance

Specific Date TBD
Go-Live #3
Community Healthlink

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC **2016**
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC **2017**
JAN FEB MAR APR MAY JUN JUL **2018**

For questions about Epic, please send an email to epic@umassmemorial.org