



Epic@Jeff

GUIDE TO GO-LIVE



Jefferson®
HEALTH IS ALL WE DO

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PROVIDERS: FOUR LATE-BREAKING UPDATES

MUST READ before Go-Live!

The following topics were not finalized prior to Provider Training but are essential to know as part of your daily activities. Please read, understand, and follow the topics below.

1. **IMPORTANT PATIENT SAFETY TOPIC AND ACTION:** **Allergy / Medication Reconciliation in Epic**

In order to enable reaction-checking, ALLERGIES FROM ALLSCRIPTS MUST BE RECONCILED IN EPIC before you can order medications!

- A mandatory HealthStream course is assigned to all providers for completion before Sunday, November 27 at midnight.
- To access, look in your HealthStream "To Do" tab to find the course titled "Medication and Allergy Reconciliation in Epic." Click Start to begin the course.

2. Dictation Workflow

Partial Dictation: Using a microphone attached to your workstation to dictate

With partial dictation, you dictate directly into **any individual part** of a note in Epic. For example, you can use NoteWriter to document a patient's review of systems and physical exam, but use partial dictation to document your HPI and A&P. If necessary, you can even dictate an entire note in this manner. This functionality is available to all faculty, as long as you have a microphone attached to your workstation.

- Link to tip sheet: <https://confluence.jefferson.edu/display/ED/Partial+Dictation>

Full Dictation: Using a telephone to dictate

This method is being deprecated in favor of Partial Dictation, but some providers will have access to this option, when a microphone is not available or practical. Special advanced setup is required.

- Link to tip sheet: <https://confluence.jefferson.edu/display/ED/Telephone+%28Full%29+Dictation>

3. Problem and Family History Archive

Problem Lists and Family History data have been brought into Epic through a process called "data conversion." Problem Lists and Family History will be visible to users in the "SnapShot" activity tab, as well as the Rooming and Plan activity tabs. **NOTE: To access additional "Archived" information for Assessments and Family History, there are some simple personalization steps you MUST DO prior to go-live.** Click the links below for this information.

- Link to more information: <https://confluence.jefferson.edu/display/ED/Overview+of+Problems+and+Family+History>
- Link to tip sheet: <https://confluence.jefferson.edu/x/aY5w>

4. E-Prescribing Controlled Substances

Learn how to prescribe controlled substances electronically in Epic. For more information click below.

- Link: [https://confluence.jefferson.edu/display/ED/E-Prescribing+Controlled+Substances+\(EPCS\)+Workflow](https://confluence.jefferson.edu/display/ED/E-Prescribing+Controlled+Substances+(EPCS)+Workflow)

PROVIDERS: GO-LIVE TIPS / SUPPORT

5 Things Every Provider Must Do During Every Visit

- Reconcile all allergies and medications converted from Allscripts.
- Document your care in the progress notes section.
- Select a “Visit Diagnosis,” enter orders, and associate orders with diagnoses.
- Complete charging by entering Level of Service (LOS), E&M Codes, and CPT Codes in Epic.
- Close the encounter to trigger your charge.

Use Epic on Your Mobile Device: Haiku and Canto

Haiku: Epic’s mobile application for smartphones.

Canto: Epic’s mobile application for iPad.

Instructions:

- Before downloading and using Epic’s mobile applications, you must have Airwatch installed by the IS&T Customer Service Center at 1837 Gibbon (215-503-8287). There is still time to get AirWatch installed.
- If you have AirWatch and do not have these apps installed on your device, please open ‘*Jefferson Apps*’ and tap install by the app. You will be able to log in beginning Saturday, 11/26.
- If you have an Android smartphone, please stop by the IS&T Customer Service Center for assistance with the additional steps needed to configure your device.
- If you installed Haiku or Canto through the App Store without going through the IS&T Customer Service Center, you will need to contact the Customer Service Center to re-install the app as it must be managed by AirWatch to work properly.

Pre Go-Live: Login Labs

- Multiple sessions have been held for clinicians and non-registration staff. There is one more session on 11/22 for you to verify credentials/security settings are correct to access Epic at Go-Live.

Date/Time	Location
Tuesday, 11/22, 11 a.m.-1 p.m. and 4-5:30 p.m.	833 Chestnut Street, 10 th Floor, Epic Genius Bar

Provider Personalization and Support Labs

- You do not need to schedule a time to attend in advance – sessions are drop-in.
- Trainers, analysts and Physician Champions will help you personalize the system and work through issues. We appreciate your patience as staff will help as many people as possible during drop-ins.

Date/Time	Location
Monday, 11/28 to Friday 12/16, 5:30-7:30 p.m. daily	833 Chestnut, 5 th Floor, Room 1

WHERE TO FIND CLINICAL DATA

The following patient information will be available for the period of time indicated. Colors in the chart match the colors of the tabs shown below in Epic where you will find the information.

Chart Review

Encounters
Notes
Letters
Media
Labs
Imaging
Cardiac
Procedures
LDAs
Meds
Episodes
Referrals
Other Orders
Misc Reports

Refresh (2:42 PM)
Route
Review Selected
Synopsis
Preview
Encounter
More
OnBase Viewer

Filters
Hide Add'l Visits
General Surgery
Admissions
Surgeries

Where to find Clinical Data

Data	Years									
	1	2	3	4	5	6	7	8	9	10+
Encounters										
Allscripts Documents										
Allscripts Scanned Documents										
Hospital Documents (Op Notes, D/C sums, Consults)										
Hospital Scanned Documents										
Quest and LabCorp Labs (includes path reports)										
Jefferson Labs										
Trended Jefferson Labs (Tumor Markers, serology results, etc.)										
Jefferson Pathology										
Radiology reports w/link to images										
Cardiac Studies (Reports only)										
Procedures (EEG, PFT Reports)										



SYSTEM CUTOVER TIMELINE

Systems and Timeline Involved with Cutover

- **IBM Initiate:** Population of patients across hospital and JUP
- **IDX:** Scheduling, Registration and billing information for JUP
- **AllScripts:** JUP EMR, including problems, medications, allergies, vaccinations and clinical notes
- **JeffChart:** Hospital EMR, including encounters and clinical results, allergies and vaccinations
- **Teleresults:** Transplant system information

Timing	Activity
Monday, 11/14	<ul style="list-style-type: none"> • Schegistration Go-Live
Friday, 11/18, 7:30 p.m.	<ul style="list-style-type: none"> • Practices that do local batch scanning (i.e. documents are scanned on-site and indexed by Central Medical Records) will stop scanning. • Couriers will continue picking up documents that go to CMR as normal during this time. • Practices with <u>old materials</u> (> 3 mo.) not yet scanned <u>should NOT try</u> to catch up prior to Epic go-live, so as to not overload Central Medical Records.
Monday, 11/21, 11:59 p.m.	<ul style="list-style-type: none"> • Manually created tasking (user-to-user) will be turned off. • Use secure Jefferson email for all user-to-user tasks. Include patient name and DOB in your message.
Wednesday, 11/23, 7 p.m.	<ul style="list-style-type: none"> • Practices that do their own scanning and indexing will stop scanning.
Friday, 11/25, 11:59 p.m.	<ul style="list-style-type: none"> • All tasks must be completed. • Automated tasking (results, system notifications) will be turned off. • Providers seeing patients on Friday, 11/25: Create and complete all unstructured/ structured notes. • Providers who use transcription: Complete all dictations. You will have until Friday, 12/02 to review and sign your notes. • No new notes can be created in Allscripts.
Saturday, 11/26, 8 a.m.	<ul style="list-style-type: none"> • Practices designated to scan into Epic can begin scanning and clearing their backlog of unscanned documents. <u>That backlog must be cleared in less than 10 days.</u>
Friday, 12/02, 11:59 p.m.	<ul style="list-style-type: none"> • All notes (manually entered or transcribed) <u>must be completed.</u>

RESOLVING COMMON GO-LIVE ISSUES

The following tip sheets have been validated and are currently available in the Epic Documentation Repository (Confluence). Additional tip sheets will be added throughout Go-Live.

Tip Sheet	Which Roles will utilize this Tip Sheet	Where it is located within the Epic Documentation Repository (Confluence)
Attach to a User's InBasket	Any role that has InBasket has this functionality	https://confluence.jefferson.edu/display/ED/Attach+to+a+Users+InBasket
Clinically Administered Medications	Nurses and Medical Assistants	https://confluence.jefferson.edu/display/ED/Clinically+Administered+Medications+Workflow
Electronic Prior Authorization	Providers	https://confluence.jefferson.edu/display/ED/Electronic+Prior+Authorization+Workflow
E-Prescribing Controlled Substances	Providers	https://confluence.jefferson.edu/display/ED/E-Prescribing+Controlled+Substances+%28EPCS%29+Workflow
How to Make Your Own Smart Lists	Providers, Nurses, and Medical Assistants	https://confluence.jefferson.edu/display/ED/How+to+Make+Your+Own+SmartLists
Patient Calls Workflow	Front Desk, Nurse, Medical Assistants, Providers	https://confluence.jefferson.edu/pages/viewpage.action?pageId=7376421
Pre Visit Planning Button on the Schedule Tool Bar	Providers, Nurses, and Medical Assistants	https://confluence.jefferson.edu/display/ED/Pre+Visit+Planning+Button+on+the+Schedule+Tool+Bar
Resident Workflow	Providers & Residents	https://confluence.jefferson.edu/display/ED/Resident+Workflow
Pulmonary Function Test Workflow	Respiratory	https://confluence.jefferson.edu/display/ED/Pulmonary+Function+Test+Workflow
Enter Lot Numbers (for supplies)	Clinic Managers, Nurses, and Medical Assistants	https://confluence.jefferson.edu/display/ED/Enter+Lot+Numbers
Order Entry for Nurses and MAs	Nurses and Medical Assistants	https://confluence.jefferson.edu/display/ED/Tip+Sheet+for+Order+Entry+for+Nurses+and+MAs
Scribe Workflow	Departments: OTO, Integrative Medicine, Rad Onc, and Sleep	https://confluence.jefferson.edu/display/ED/Scribe+Note+Workflow

You can also help troubleshoot and avoid many common issues by taking the simple steps below.

Security and Login

Issue(s)	Resolution(s)
I can't login.	<ol style="list-style-type: none"> NOT COMPLETED TRAINING: You will not have access. Call IS&T Solution Center at 3-EPIC to learn what you will need to do. COMPLETED TRAINING: Consult your Super User or call the IS&T Solution Center at 3-EPIC to troubleshoot the issue.
I'm not seeing what I expect when I log in.	<ul style="list-style-type: none"> If you have multiple login departments, be sure you selected the correct one when you logged into Epic.

Printing and Print Routing

Issue(s)	Resolution(s)
Something didn't print where I expected.	<ul style="list-style-type: none"> You cannot resolve this issue individually. Consult your Super User to troubleshoot and resolve.
Controlled substance scripts aren't printing with required security watermark.	<ul style="list-style-type: none"> You cannot resolve this issue individually. Consult your Super User to troubleshoot and resolve.

Accessing Reports

Issue(s)	Resolution(s)
I can't find reports.	<ul style="list-style-type: none"> Search the Library by selecting the Epic Button>Reports>My Reports. Then select the Library tab. Enter the topic of the report you are looking for in the search field.
I want to run/edit a report.	<ul style="list-style-type: none"> Select the desired report and click the "Run" or "Edit" icons.
I need to save a report to run regularly.	<ul style="list-style-type: none"> Click the star icon to the left of a report name to save it as one of your favorites that you will see when you access "My Reports."

Cutover, Conversion and Data Access

Issue(s)	Resolution(s)
Some historical patient data is incorrect.	<ul style="list-style-type: none"> You should be able to correct most data issues without support. Physicians should reconcile all converted patient data in Epic upon first patient encounter and update any data that is not accurate.
I can't find specific historical data.	<ul style="list-style-type: none"> Refer to "Where to Find Data Post Go-Live" in this guide, which details the types of data you will find in Epic.

Schegistration Issues Impacting Providers

Issue(s)	Resolution(s)
I can't chart on my patient.	<ul style="list-style-type: none"> You might be able to correct this issue without support. Ensure your patient has been checked in by the front desk. If not, you will not be able to chart. Consult your Super User for further questions.

Scanning

Issue(s)	Resolution(s)
I don't know how to scan documents?	<ul style="list-style-type: none"> You might be able to correct this issue without support. Nurses and MAs please see tip sheet below more information to assist with scanning, scanning to new orders, scanning external referral notes and entering results. https://confluence.jefferson.edu/display/ED/Scanning+and+Entering+Results+for+Nurses+and+MA+Workflow

WHERE TO GO FOR HELP WITH GO-LIVE ISSUES

Please Follow This Four Step Process

Troubleshoot on your own	1. While in Epic, use My Dashboards/Learning Home
	2. Outside of Epic, use the Epic Documentation Repository (Confluence)
Get help from Super Users and the Solution Center	3. For immediate resolution or to report an issue, talk to your local Super User
	4. If a Super User isn't immediately available, self-report the issue, either on line or by phone <ul style="list-style-type: none">There will be a dedicated Physician Support Line available during Go-Live.

Troubleshoot On Your Own

1. While in Epic, use My Dashboards/Learning Home:

My Dashboards/Learning Home provides a customized list of tip sheets based on your role.

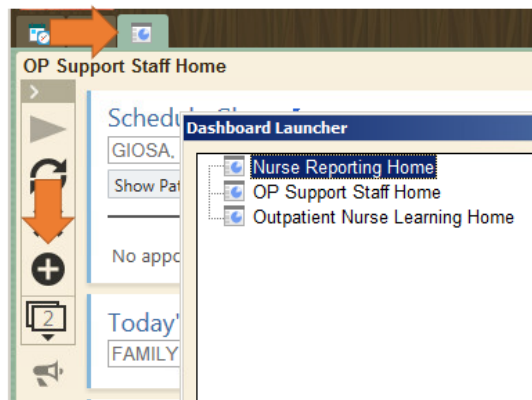
Instructions:

1. Log into Epic
2. You have a My Dashboards/Learning Home tab.
3. Look for this 'icon below' for the 'My Dashboards' (some call it a pie chart others call it a pac man tab).



4. Then click on the Plus Sign + (on the left hand side) and select the **Learning Home** to access Quick Start Guides and Tip Sheets.

Scenario: Below you could select the 'Outpatient Nurse Learning Home' to access Quick Start Guides and Tip Sheets.

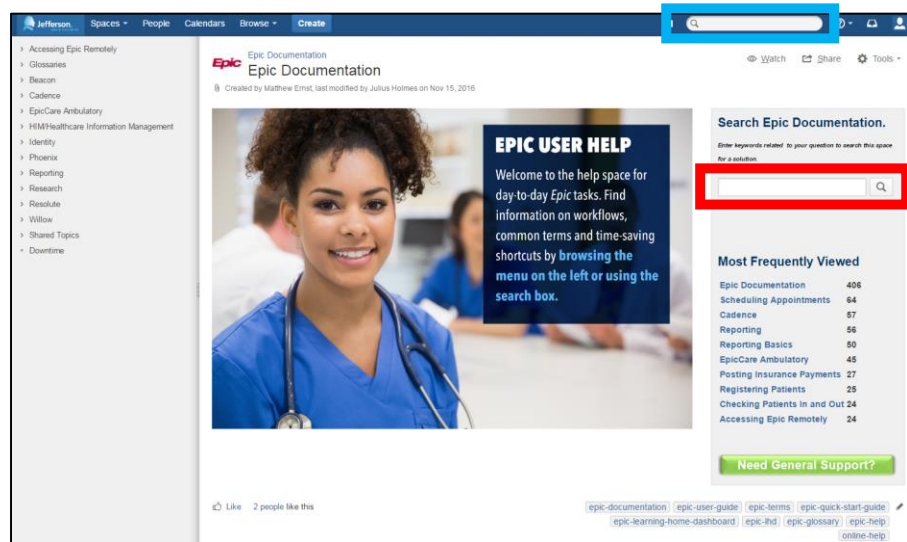


2. Outside of Epic, use the Epic Document Repository (Confluence):

The Epic Document Repository contains all tip sheets and application-based Quick Start Guides. This site is a work in progress and is the single source of truth for all tip sheets. It will be updated on an ongoing basis with new and updated tip sheets.

Instructions:

- Link: <https://confluence.jefferson.edu/display/ED/Epic+Documentation>
- Log in using your Jefferson campus key and password.
- To search only Epic@Jeff tip sheets, use the search bar **outlined in red** below.
- Please do not use the search bar at the top of page **outlined in blue** – which will search all topics unrelated to Epic.



Get Help from Super Users and IS&T Solution Center

3. Talk to a Super User who will help:

1. Resolve or clarify an issue immediately, if possible.
2. Report an issue for further resolution by Solution Center/Epic@Jeff Command Center by calling 3-EPIC or submitting a ticket online.



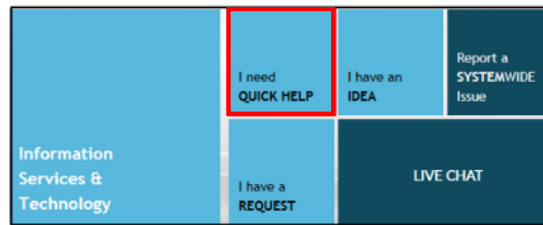
4. If a Super User isn't immediately available:

1. Physicians can call 3-JEFF (215-503-5333) for a direct line to physician support.
2. You can log a self-service ticket online using the desktop icon pictured to the right OR via this link:

https://jefferson.service-now.com/tjuh_portal/home.do



- After you sign in, click **I need QUICK HELP**.



- Select your preferred method of contact in the **Contact Preference** section.

Campus Key	Name	Contact Preference
<input type="text" value="jqh001"/>	<input type="text" value="Julius Holmes"/>	<input type="text" value="Email"/>

- Select the **Category** of your ticket that best describes your issue.

* Category

-- None --

-- None --

Account

Hardware

Software

- Add a **Description** of the issue and any **Additional Details** for the request.
- Click **Submit**.

Short Description
<input type="text"/>
Additional details
<input type="text"/>
<input type="button" value="Submit"/>

HOW AND WHEN YOU WILL HEAR ABOUT ISSUES

The following methods of communication will be used to keep you informed of key issues during Go-Live.

1:1 Super User/Solution Center Feedback

- IS&T Solution Center will report back resolutions to all Users when issues are resolved.

Go-Live Website

- Link: <http://ist.jefferson.edu/ist/epic/wave-1-go-live-updates.html>
- Updated regularly as issues are reported, updated, resolved.
- Includes running list of top issues including those from daily Top Issues @ 6 updates.



First Posted	Issue/Concern	Updates/Resolution	Latest Update	Related Resources
11/26/2016	Provider not working in Family Medicine offices.	Resolution: Connected with reconfiguration of role settings.	11/26, 1:00	Updated Top Issues

Top Issues @ 6

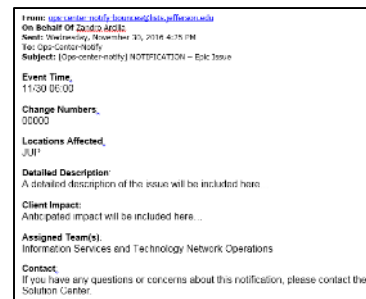
- Emails from Epic@Jeff pushed out to Wave 1 Ambulatory Users at approximately 6 p.m. daily.
- Includes updates, solutions, resources for top issues and any system enhancements.



First Posted	Issue/Concern	Updates/Resolution	Latest Update	Related Resources
11/26/2016	Provider not working in Family Medicine offices.	Resolution: Connected with reconfiguration of role settings.	11/26, 1:00	Updated Top Issues

Real-Time Updates from Solution Center

- Email updates will be sent as usual from Solution Center (*email address is displayed as "Ops Center Notify"*) for issues that have broad impact or need to be communicated immediately.



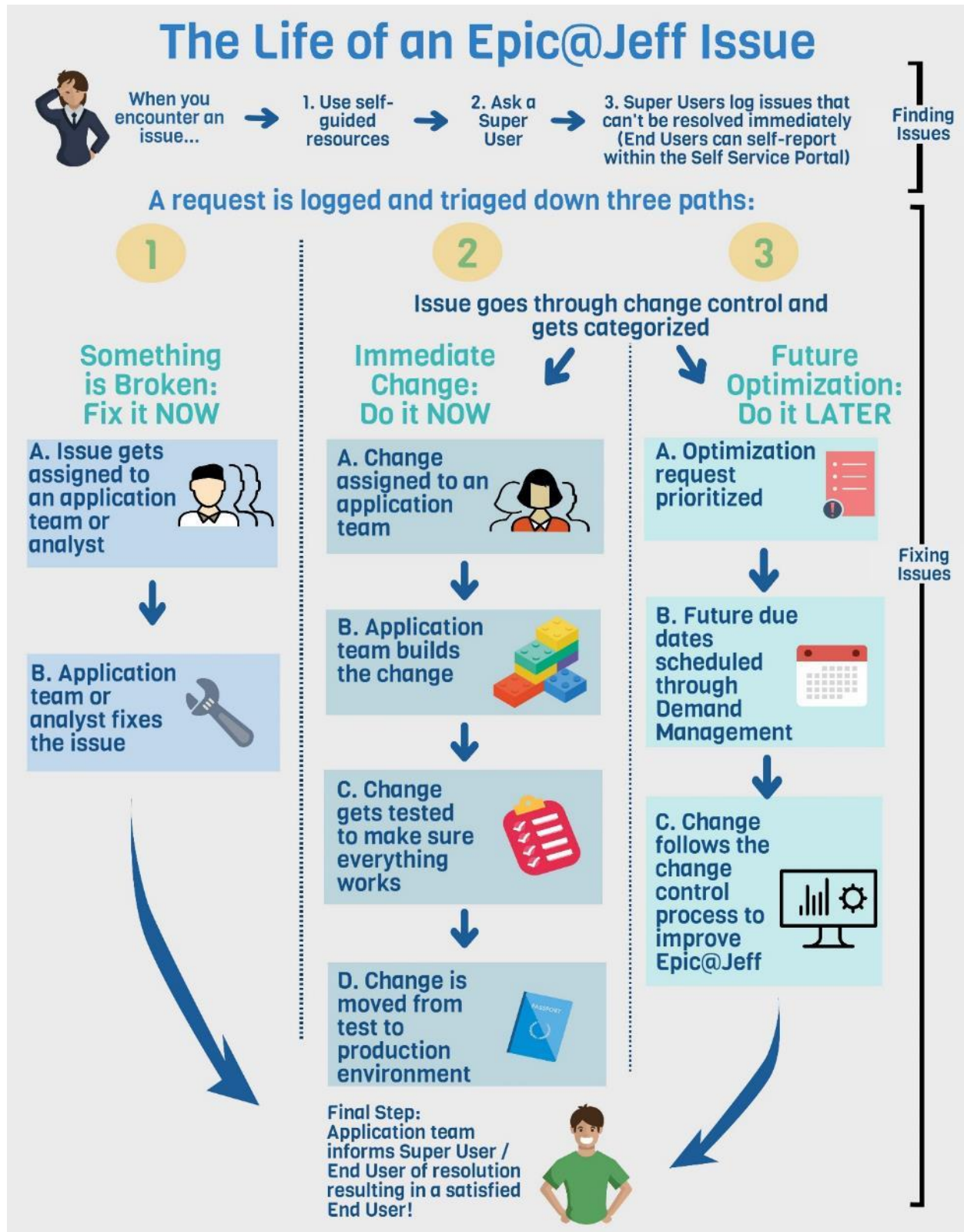
First Posted	Issue/Concern	Updates/Resolution	Latest Update	Related Resources
11/26/2016	Provider not working in Family Medicine offices.	Resolution: Connected with reconfiguration of role settings.	11/26, 1:00	Updated Top Issues

Text Alerts If Needed

- Sent to Super Users, managers and above for urgent updates only.
- Super Users, managers and above cannot opt out of receiving these messages.
- PLEASE NOTE:** Text alerts might appear as Jeff Alerts if you have saved the Jeff Alert contact number in the contact list on your phone. However, all Epic-related text messages will begin with the words, "Epic@Jeff Update."

Epic@Jeff Update: Printing is experiencing widespread issues. You will receive an update by text when the issue is resolved.

WHAT HAPPENS WHEN ISSUES ARE REPORTED



HOW ISSUES WILL BE PRIORITIZED AND RESOLVED

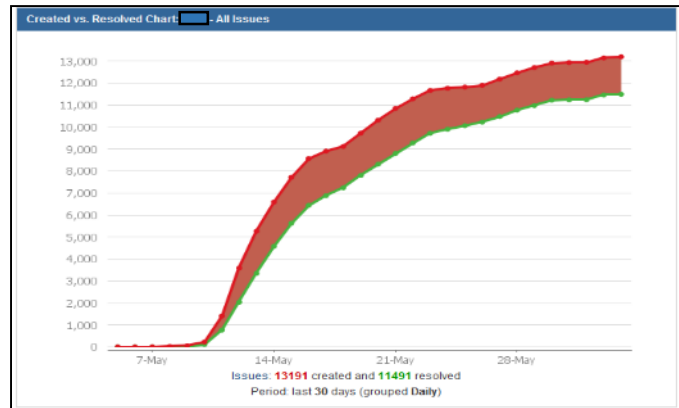
What to Expect After Go-Live

Weeks 1-2 (11/26-12/09)

- Thousands of issues with varying criticality will be reported.
- Issues will be prioritized based on impact (see below).

Weeks 3-4 (12/10-12/23)

- Your comfort level using Epic will increase and operations will begin to return to normal.
- Most critical/immediate issues will have been resolved and the focus will shift to making changes that help improve and enhance user workflows and efficiencies.



Weeks 4+

- Operations return to normal.
- Please report any issues directly to the Solution Center.

How Issues Will Be Prioritized

Critical	High	Medium	Low
Large number of people impacted, Patient safety concerns, Critical hardware, Revenue impacts	Multiple people impacted, Patient workflows impacted, Security or access issues prevents work	Multiple people impacted, No patient workflows impacted, Temporary fix identified to continue working	Individual/few people impacted, Temporary fix identified to continue working

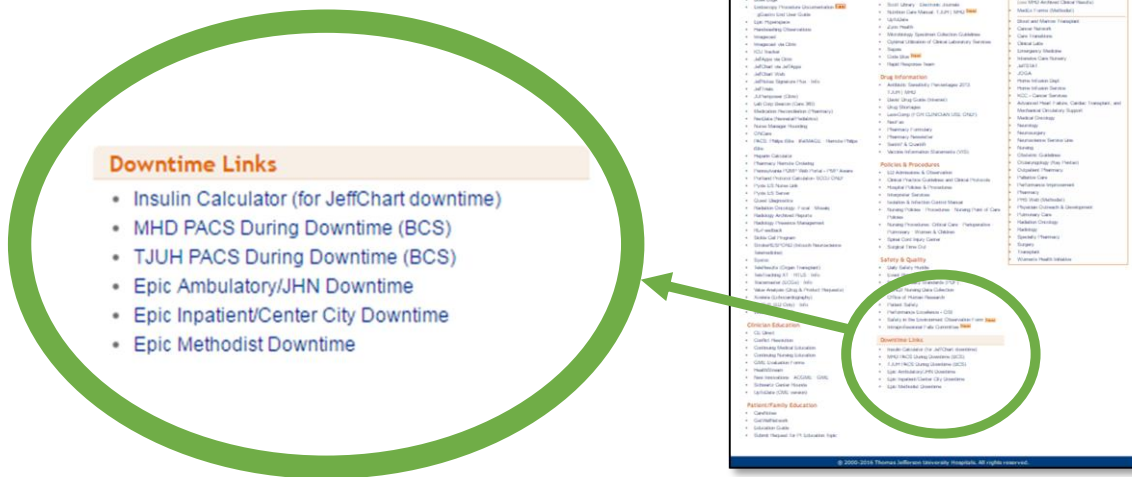
How You Will Get Status Updates for Your Issues

- **Opened:** When your issue is reported, you will receive an email notification confirming it has been logged.
- **Working:** Command Center staff will contact you or your Super User if more information is needed to troubleshoot and resolve your issue.
- **Closed:** When your issue is closed, you will receive an automated email notification with brief explanation.
 - **Reopening:** If the same issue continues to occur, you can reopen the problem ticket within 3 days using the link in the email you received when it was closed.

WHAT TO KNOW IN CASE OF A DOWNTIME

Where to Find Links to Downtime Information

1. Open the TJUH Intranet.
Link: <http://tjuh.jeffersonhospital.org/>
2. Click the menu option for the “Clinician” page (circled in orange).
3. Scroll to the bottom of the page and look for the “Downtime Links” section (circled in green).



Where to Find BCA Downtime Policies

- Downtime policies are available in the IS&T Knowledgebase (Confluence) by searching “BCA.”
- Link: <https://confluence.jefferson.edu/display/ED/Epic+Documentation>

Downtime Statuses

Supports Read Only (SRO)	BCA Web	BCA Print
<ul style="list-style-type: none"> • Snap-shot of Epic before the downtime started • Always available. • Snap-shot of Epic. • Charting and new data are unavailable. 	<ul style="list-style-type: none"> • Internet application to view downtime patient reports. • Back-up plan for SRO. • Used when Epic is down and the internet is still up. 	<ul style="list-style-type: none"> • View and print downtime patient reports from the downtime computer. • Locate the downtime computer. Look for a yellow background screen and monitor labeled “EPIC DOWNTIME BCA PC.” • Used when the internet is down or during a power loss.

JEFFERSON HEALTH MYCHART ENGAGEMENT

Key Points of Patient Engagement

- **Pre-Visit/Phone/Schegistration**
 - Introduction for patients to learn about availability of new portal.
 - Helps collect/update email addresses so activation codes can be sent.
- **Front Desk/Registration**
 - Provide patients fact card about Jefferson Health MyChart.
 - Inform them they can sign up while at the office today.
- **Exam Room (most effective engagement opportunity)**
 - Give patients more information and help explain benefits of portal.
 - Endorsement of portal by caregivers, providers and physicians.
 - In-office patient/activation of portal.
- **Check Out**
 - Thank patients who registered for portal.
 - Remind patients about portal and information printed on AVS.

Talking Points and FAQs

- Talking Points and FAQs have been provided for caregivers and support staff at all JUP offices.
 - [Click here to access the document.](#)
- The document will continue to be updated and questions can be emailed to epic@jefferson.edu.
- MyChart Tip sheets: <https://confluence.jefferson.edu/display/ED/MyChart+Navigation>

Patient Results in Jefferson Health MyChart

- Test results are released to a patient's Jefferson Health MyChart account after they are available in the electronic health record at Jefferson.
- Not all test results are available in Jefferson Health MyChart. A patient's provider is able to determine which types of test results can be accessed through the patient portal.
- For more information, patients should speak with their provider.

Marketing Resources

- Marketing resources, including the following, will be available for use in JUP offices:
 - Posters
 - Fliers
 - Table Tents
 - Fact Cards
 - Patient Letters
- Letters will be sent to patients through current patient portal before it is closed.



KEY GO-LIVE SUPPORT ROLES

Super Users (aka: At-The-Elbow Support)

- Look for “Thanksgiving themed **cranberry-colored**” Super User shirts to get the quickest support.
- More than 600 Super Users have been identified and trained. They are:
 1. Dedicated support for large practices
 2. Assigned to an area or region for smaller practices and for additional support
- The Super User support schedule is available here: <http://ist.jefferson.edu/ist/epic/wave-1-go-live-updates/super-user-schedule-.html>
- First, Super Users will help you “at-the-elbow.”
- If they can’t resolve in real time, they will submit issues on your behalf.
- If a Super User is unavailable, you can also report issues online or via phone.



Solution Center and Epic@Jeff Command Center

- Members of these teams will work on the resolution of assigned tickets, appropriately document resolutions and close out requests through communication with users.

Jefferson Leadership

- Department chairs, administrators and senior leadership will provide daily support and participate in rounding during the first several weeks of Go-Live using the AYS process to help assess needs and status.

Trainers, Technical Teams

- Trainers will create/update tip sheets to help address any issues that arise at Go-Live.
- Remember, all tip sheets will be available through the [Epic Document Repository \(Confluence\)](#). Tip sheets and changes will be communicated through daily email and web updates.