Epic Integrated Consulting Services
Seamless integration for system implementation, transition, optimization, legacy support and training

With nearly a third of all electronic health record (EHR) inpatient installations and nearly 200 million patient records, Epic is one of the largest and fastest growing clinical IT solutions. As a highly modularized offering, Hayes Management Consulting’s team of certified experts can help you implement, transition and optimize your Epic system. With nearly two decades of Epic experience, Hayes provides a seamlessly integrated solution to enable you to maximize the return on your investment and achieve the greatest functionality of your system.

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An Integrated Solution

Our consultants bring expertise in Epic modules covering scheduling, registration, billing, pharmacy and various other clinical and revenue cycle disciplines.

With our wide range of Epic expertise, we can help you seamlessly integrate your Epic installation eliminating the need to bring in separate consultants for each module. Our unique, integrated offering enables you to better leverage your Epic installation by developing integrated workflows that maximize revenue and minimize costs. This end-to-end approach to managing revenue cycle, patient access and overall operations differentiates Hayes from other Epic consultants in the marketplace. Hayes works closely with Epic, allowing us to keep our team current through continuous Epic training and certifications.

Our Epic-certified consultants come from the frontlines of healthcare, understand the day-to-day challenges you face and weave this experience into every engagement. We adapt to your organizational culture to quickly “fit in” with your team to anticipate and avoid issues before they occur. Our consultants add value to every engagement and will ensure that your Epic system enables you to successfully reach your business goals.
The unsettled healthcare IT market continues to trend toward consolidation as a result of margin pressures and merger and acquisition activity. This is causing a flurry of IT system changes and increasingly organizations are transitioning to Epic as their system of choice.

The transition from one clinical IT system to another is often stressful, but Hayes experts can help you implement a seamless conversion. Our consultants are fluent in all major healthcare IT systems including Epic, McKesson, Cerner, GE Centricity, Allscripts and athenahealth. This multi-language fluency enables us to provide a reliable roadmap to translate modules, workflows and key performance indicators from any legacy system to Epic.

As a partner in Epic’s Healthy Planet Data Aggregation Program, Hayes can help you prepare your data for transfer from your legacy system. We have a proven track record of experience assisting leading healthcare organizations with extracting and transitioning data into Epic.

The Hayes Bridge: Transitioning to Epic
To facilitate a smooth transition to Epic, Hayes consultants work with your team to build a bridge based on these five foundational elements:

<table>
<thead>
<tr>
<th>Pre-Planning</th>
<th>Planning</th>
<th>Implementation</th>
<th>Optimization</th>
<th>Legacy Decommissioning</th>
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<tbody>
<tr>
<td>• Assess current state of KPIs in legacy system</td>
<td>• Recommend legacy system optimization areas for easier transition to Epic</td>
<td>• Optimization of “legacy” and “feeder” systems and interfaces</td>
<td>• Measure KPIs and compare to pre-implementation</td>
<td>• Legacy system support – pre and post Epic implementation</td>
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<tr>
<td>• Crosswalk of KPIs from legacy system to Epic</td>
<td>• Recommend optimization of “feeder” systems and interfaces for transition</td>
<td>• Development and validation of future state workflows</td>
<td>• Validate success criteria and conduct gap analysis</td>
<td>• Legacy A/R wind down strategy</td>
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<tr>
<td>• Define goals, objectives and success criteria for Epic implementation</td>
<td>• Provide project timeline and budget including resources, hardware, software</td>
<td>• System build</td>
<td>• Review and align with Epic Gold Stars program</td>
<td>• Data transition</td>
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<td></td>
<td>• Testing cycles</td>
<td>• Develop ongoing optimization plan</td>
<td>• Archiving strategy and solution development</td>
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<td></td>
<td></td>
<td>• End user training development and delivery</td>
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<td>• Decommission plan for systems and interfaces</td>
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### Legacy System Support

Supporting the existing legacy system during a conversion is a significant component of a transition to Epic. Hayes frees up internal staff by providing trained personnel to manage your legacy applications during the conversion project.

### THE PROGRAM CONSISTS OF:

<table>
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<th>Service</th>
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<tr>
<td>24/7 HELP DESK COVERAGE</td>
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<tr>
<td>REGULATORY CHANGE IMPLEMENTATION</td>
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<td>SYSTEM CHANGE REQUESTS</td>
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<tr>
<td>HAYES TEAM SELF SUFFICIENCY AFTER TWO WEEKS OF KNOWLEDGE TRANSFER</td>
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<tr>
<td>A/R WIND DOWN SUPPORT</td>
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<tr>
<td>WEEKLY STATUS REPORT OF AGREED UPON SERVICE LEVEL METRICS</td>
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<td>QUARTERLY EXECUTIVE MEETINGS TO REVIEW PERFORMANCE AND DISCUSSION ISSUES</td>
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<tr>
<td>GO-LIVE SUPPORT</td>
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### Managing Wind Down Internally

The Hayes internal wind down program includes:
- Evaluating viability of continuing to handle A/R management and wind down internally
- Conducting ROI, collectability and cost-to-collect analysis on legacy A/R to determine if internal wind down is the most viable and cost effective methodology
- Developing workflows and policy modifications
- Evaluating technology needs
- Establishing budget (facilities, staffing, hardware, training)
- Developing timeline, milestones and quality benchmarks
- Providing interim management of business office during transition (if necessary)
- Monitoring performance during transition

### Outsourcing Strategy for Wind Down

Hayes can also help should you decide to outsource all or pieces of your A/R. Our outsourcing A/R wind down process includes:
- Conducting needs identification and scoping
- Developing RFP process
- Performing outsource vendor evaluation
- Evaluating other third party vendors (eligibility, self-pay, collection agencies) that may be required for A/R wind down activities
- Assisting in vendor selection and contracting
- Developing workflow and policies
- Evaluating technology needs
- Conducting project oversight and management
- Performing ongoing ROI analysis
- Completing an A/R collectability analysis to target accounts that can be managed internally to maximize reimbursement and accounts that are more challenging to outsource
- Establishing reports and controls
- Monitoring performance to agreed benchmarks for vendor

### Archiving and Storage

It’s critical to establish a plan for archiving and storage of your legacy A/R and records after the wind down efforts are complete. Hayes will work with you to develop an archiving solution and solicit RFPs to manage the process. We will also help develop policies for retrieval of archived patient account information.

### A/R Wind Down Support

A/R must be handled carefully during a transition to ensure critical cash flow is not interrupted. Hayes brings revenue cycle and system expertise and works with your in-house staff to plan and implement an internal or outsourced wind down strategy to avoid the complex process of managing two buckets of receivables.
Developing an Epic optimization plan that is aligned with measurable outcomes is an effective way to improve care quality, reduce operating costs and enhance revenue performance. Hayes believes optimization is more than just improving the functionality of your system. Our consultants are experts in identifying all opportunities for greater efficiency to streamline data access, enhance clinical collaboration, refine processes and improve outcomes.

Our team will review all people, processes and technology to ensure your system is operating to its potential. During the engagement, the Hayes team will:

- Review and develop improvement plans for all processes and workflows
- Evaluate all personnel and recommend training opportunities
- Improve patient flow for increased provider and patient satisfaction
- Leverage system functionality to improve productivity and efficiency

KPI Management

Epic’s Gold Stars program provides an ideal foundation for your optimization program. Monitoring, measuring and reporting on your operations using KPI’s specified by Epic helps you drive an effective continuous improvement program.

Hayes consultants can help you target and manage specific KPIs that best support your organizational goals. Our KPI assessment begins with a deep dive evaluation of your current workflows, technology and staff. We also evaluate both the clinical and revenue cycle metrics you currently monitor. You receive a comprehensive analysis of recommended target areas for improvement by Epic module and a roadmap detailing timeline and level of effort required.

If you prefer to start with one type of KPI, we can provide the following:

- **Revenue cycle KPI assessment** – financial assessment that provides evaluation and recommended target areas for improvement utilizing Epic revenue cycle KPIs
- **Clinical performance KPI assessment** – clinical assessment that provides evaluation and recommended target areas for improvement utilizing Epic clinical performance KPIs

Hayes provides seasoned project managers to ensure effective implementation, report development and analytics management. We also offer certified Epic builders who can make any changes needed for optimization.
Reporting Services

Your Epic system is gathering voluminous patient data on an ongoing basis. To use this data effectively, however, requires getting it into a form that key stakeholders can use to help with decision making. That means creating and building reports that can be shared throughout the organization.

Epic provides a wealth of data you can use to optimize your operation. Hayes consultants are well versed in Epic databases and will work with your team to help with the data extraction and report creation process.

The Epic reporting services program consists of:

**Needs Assessment**
We will review your operation and report requirements and help you select the appropriate Epic tool to meet those needs.

**Tools Training**
Our consultants will conduct extensive training with your staff on the three major Epic report creation tools. This includes instructing your team on which tool is most appropriate for the task and how to create the report.

The Epic tool set consists of:

- **Reporting Workbench** – Primary tool for creating quick, ad hoc, real-time operational reports
- **Caboodle Data Warehouse** – An analytical healthcare database of Epic and non-Epic data designed to create reports requiring large amounts of data
- **Business Intelligence** – Ideal tool for creating complex reports that require large amounts of data over longer periods of time

We will also train your staff in creating and generating reports that can help you audit charges, payments and other billing activity.

**Healthy Planet**
Reporting is key to meeting the growing needs of population health management. A key component of your system is Epic’s Healthy Planet, a software module focused on population health. Healthy planet contains a suite of reports, dashboards and workflow tools that compile patient data in a centralized data warehouse and allow care managers to coordinate care delivery, monitor quality, track costs and minimize financial risk.

Hayes works with your team to help design appropriate reports to manage population health both outside and within an Accountable Care Organization (ACO).
Hayes understands that every organization is different when it comes to training requirements, which is why we build a team customized for your specific needs. Our experienced trainers will help develop the curriculum, create materials, conduct the training program and provide go-live support for your training initiatives. Whatever your training needs, Hayes will develop the right program to ensure the success of your Epic implementation, conversion or optimization effort.

Knowledge transfer is a key part of our Epic service offering. We make sure our expertise remains with your staff long after our consultants have left. We use proven knowledge transfer methods that ensure improved staff performance including:

- **Pod-style workgroups** that match Hayes consultants with staff members to work side by side to mentor them on every process
- **Project planning templates** that ensure best practices are incorporated into your future project planning
- **Instructional materials** that serve as “how-to” reference guides and assist in training new staff members

We also help you recruit, onboard and manage permanent Epic-certified training resources to ensure your program runs smoothly going forward. We provide an account manager as a single point of contact to coordinate resources and communicate updates and project needs. We use a proven recruiting methodology supported by behavior-based tools like Performance Index (PI) to ensure we hire the most qualified candidates with the Epic skill sets that match your specific training needs.
Hayes Management Consulting
Hayes Management Consulting is a leading, national healthcare consulting firm and software developer that partners with healthcare organizations to streamline operations, improve revenue and enhance technology to drive success in an evolving healthcare landscape. To learn how Hayes can help you with your compliance needs, call 617-559-0404 or requestconsultant@hayesmanagement.com.

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