

## **Epic Transitions: How to Prepare Your Staff for Enterprise Wide Change**

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### **1. Background**

Our institution implemented a new EMR system, EPIC, in June 2018. Given the scope of the project, the transition involved implementing many new procedures and practices that were developed without input from Oncology Research Management. Information was updated frequently, since many decisions were not finalized until several weeks prior to go-live. The EPIC staff provided system training, but they did not cover any job-specific instruction or speak to the Division's policies and procedures. To complicate things further, our staff consists over 180 members in varying roles requiring different levels and degrees of training and preparation for go-live. In order to maximize staff education, we supplemented the Epic provided training with 4 optional in-person sessions for research coordinators prior to Go-Live, 3 mandatory in-person training sessions hosted after Go-Live, created 25 tip sheets that were stored for quick review, and identified 18 staff as SuperUsers to assist with in person support. Given the unique opportunity presented by the transition, we wanted to learn what tools were most helpful to help guide training sessions surrounding significant change in the future.

### **2. Goals**

Since the time leading up to go-live was hectic, we wanted to hear from our staff on how they experienced the change and transition. Post Epic Go-Live we sought to understand what was helpful and added benefit vs. what was unnecessary or lacking during the transition. By their responses to this large change, we could not only see what learning and communication styles they preferred, but also better understand how they prefer to learn about and implement change for future program developments.

### **3. Solutions and Methods**

We sent a 10 question survey to all staff 3 months post go-live to better understand their experience during go-live and the months leading up to it. We surveyed what was most helpful, their preferred learning style, and what resources they knew were available to them.

### **4. Outcomes and Future Directions**

- Most helpful thing they did to prepare for Epic implementation: 40.8% attend Oncology sponsored training sessions led by the Education and Training Team
- When coordinators were unsure how to navigate something, they found the most helpful resources to be their teammates and the Education and Training Team
- When asked what they wished could have gone differently to help them prepare for go-live, 59.4% requested more job-specific, in-person training.
- When asked how coordinators prefer to receive information, 53.8% of coordinators requested an emailed tip sheet.

*Category: Training & Quality Assurance – Completed Project*

Large overall themes throughout the data were that staff appreciated being notified of procedural changes in advance and they found job-specific training provided by our internal Education & Training Team to be the most effective way of communicating information. While staff requested that information be shared via email or work instructions, they realistically are more likely to consult a person than a set of work instructions. This points to the importance of investing effort in job specific in-person education as opposed to relying on tools or tip sheets.