

**CASE STUDY** ROCKFORD HEALTH SYSTEM

## Encore Provides Advisory Services to Rockford Health System During Epic Implementation

### CHALLENGE

Rockford Health System (Rockford) had recently completed Phase 1 of its Epic implementation, a multi-million dollar project the organization has called the “largest and most ambitious technology initiative” in its 26-year history. Following the Phase 1 implementation of EpicCare Ambulatory and the MyChart patient portal at Rockford’s physician practices, an April 27, 2013 go-live date for the next phase was quickly approaching. Given the multiple challenges encountered in the completion of Phase 1, it was critical that Rockford implement Phase 2 on time and within budget to further the organization’s goals related to patient safety, decision support, and regulatory reporting.

Phase 2 was a complex “big bang” implementation that involved multiple in-patient applications including EpicCare Inpatient Orders (CPOE) & Clinical Documentation, ASAP Emergency Department (ED), OpTime perioperative and Anesthesia, Willow Pharmacy, Radiant, Cadence Scheduling, Resolute Hospital Billing Suite, Patient Access, and Health Information Management (HIM). Due to the scale of the project, the effort was particularly daunting for Rockford’s new build team who at the time had limited experience with Epic implementations. Additionally, Rockford was still recovering from an unexpected transition in their Physician Champion role, an issue that had occurred during the early critical stages of implementation. These internal dynamics, coupled with Rockford’s self-described non-confrontational organizational culture, had hindered the ability to utilize rapid, effective decision-making required to plan and execute the implementation successfully. To help ensure that the implementation was headed on the right track, Rockford enlisted the services of several experienced Encore Health Resources (Encore) consultants to provide the Rockford team with an objective point of view and offer guidance during this pivotal stage of the implementation.

### SOLUTION

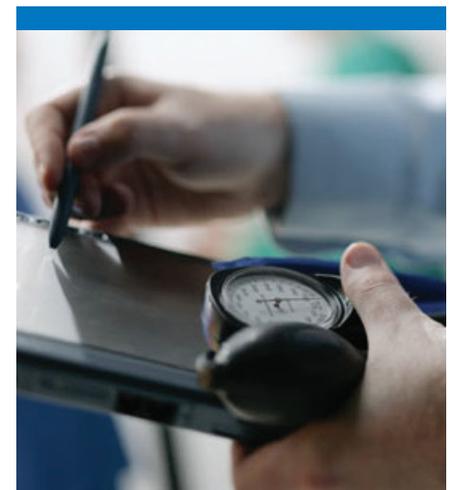
Encore was engaged to provide advisory services to Rockford’s operational and Epic project leadership. The objectives of the engagement were to help Rockford identify and mitigate implementation pitfalls, as well as propose solutions based on best practices for large scale, community hospital implementations. Encore delivered these services using a 2-Step approach. Step 1 involved a 6-week advisory assessment performed by two senior consultants, both with over 20 years of healthcare experience. During this assessment, Encore’s consultants conducted interviews with key operational and project leaders at Rockford including the Chief Nursing Officer (CNO), physician and clinical champions, project director and application project managers, to identify strengths, weaknesses, and opportunities in the preparation for implementation. Through its assessment, Encore identified opportunities in Rockford’s physician preparedness and physician champion engagement approach, a lack of robust nursing structure and process surrounding development of standardized and improved processes, as well as a minimum of preparedness presenting significant risk in certain ancillary departments. Encore also identified an opportunity for improvement in the communication and risk management strategies across the Rockford project, particularly in the integration and collaboration between the revenue cycle and clinical project teams. At the close of the assessment, Encore’s consultants analyzed these findings and presented a number of recommendations to Rockford’s Chief Information Officer (CIO).

Based on the Encore’s findings from Step 1, Rockford expanded the scope of its engagement with Encore to add a second step to the project. In Step 2, Encore consultants served as trusted



### ABOUT ROCKFORD HEALTH SYSTEM

Rockford Health System, established in 1885, is a leading provider of health services to the northern Illinois and southern Wisconsin community. It includes a network of hospitals and physicians’ practices, as well as a range of community health programs and specialty services. The organization consists of Rockford Memorial Hospital a nearly 400-bed tertiary care medical center that administers services ranging from general primary care to surgery. The hospital is home to a children’s medical center, a heart and vascular health center, and specialty care facilities for neurosurgery and orthopedics. Rockford Health System also includes the following affiliated organizations: Rockford Health Physicians, Van Matre HealthSouth Rehabilitation Hospital, Visiting Nurses Association, and The Rockford Memorial Development Foundation.



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advisors to Rockford’s Executive Leadership on issues affecting the implementation that had been identified during the previous assessment. Throughout the 12-weeks of Step 2, Encore paired several of its senior-level Subject Matter Experts (SMEs) with specific Rockford key leaders to provide advice and best practice guidance around key decisions and process transformation. The Encore team included members to ‘partner’ with Rockford counterparts. One consultant was responsible for supporting Rockford’s CNO and Clinical Champions, while another focused on supporting the Physician Champion. A third Encore consultant was added to support Rockford’s Epic clinical ancillary applications. These consultants were supported by several Encore senior leaders who provided overall oversight of the effort to ensure not only that the project objectives were achieved but also the team’s approach and delivery met and exceeded Rockford’s expectations. A Client Service Executive (CSE) from Encore worked on-site monthly at Rockford, provided project oversight, supported Rockford’s CIO and a Project Manager, and monitored the project’s overall status and quality assurance.

In addition to the steadily engaged team on the ground, Encore provided the Chief Medical Officer (CMO) of the company as a mentor and advisor to the Physician Champion, Executive Leadership Team, and the Project Steering Committee. The Encore CMO provided advice and guidance in such areas as the role of the CMIO/Champion, overall implementation strategy, The Epic Model Methodology, short and long-term strategic planning, physician engagement and communications, and clinical/physician goals for the Electronic Medical Record (EMR). Encore also provided references, research, tools, and successful experience models through critical operational and project decisions. Additionally, Encore’s CMO provided a ‘physician-eye” quality review of all order sets during and after the orders set build process, as well as MD/CMIO-level guidance during the go live around interpretation of physician adoption and utilization data. The CMO then worked with the rest of the Encore team to develop recommendations for post go-live next steps and organizational goals. Prior to go live, the Encore CMO developed and presented a continuing education workshop for all Rockford’s physicians on the benefits of EMRs with continuing medical education (CME) credits available to participants.

Through increased interaction with Rockford’s stakeholders and project teams, Encore was able to help address several other issues related to the decision-making environment within Rockford. For example, when Encore consultants identified poorly defined goals within Rockford’s implementation guiding principles, Encore proposed and led a visioning session with Rockford leadership to clarify and strengthen their goals and objectives for the project. The Encore team also collaborated with Rockford to assist leadership in addressing the lack of accountability among analysts, minimal rigor in the testing approach, and concerns regarding the Hospital Outpatient Department (HOD) build & training plan. As the project progressed, Encore’s role transitioned from a predominantly advisory role to one more actively integrated into other areas of Rockford’s implementation; this involvement included participation in go live planning, integrated testing, coordination of order set validation sessions, providing actual clinical document build, and active participation in in Testing Device Readiness (TDR), cutover activities, and finally, go-live support.

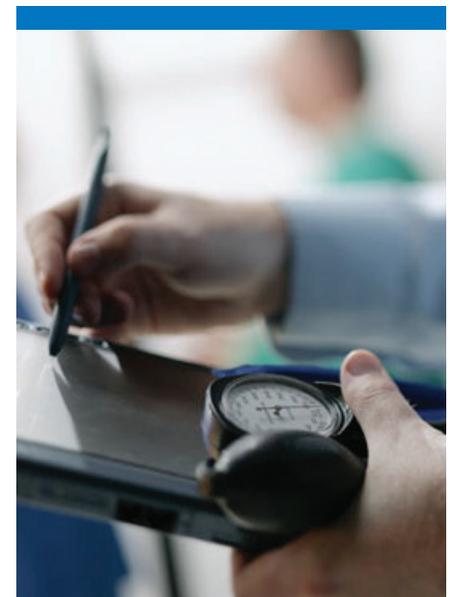
Throughout the engagement, Encore’s consultants were tasked with critical project responsibilities, some of which included:

- Managing the policy and procedure revision process for nursing.
- Providing support for organizational decision making for process changes driven by the Epic implementation.
- Coordinating and driving the process for Rockford’s orders team, physician champion and inter disciplinary teams to complete order set validation during the final months of the project when the Project Manager’s and Director’s availability were limited.
- Facilitating planning meetings between the PMs, Project Director, and the Physician Champion/Nurse Champion.



“Encore was invaluable in bringing experience from other Epic implementations regarding what worked and didn’t work, and in helping to assure that the clinical care of our patients as provided by the nurses and physicians was given priority consideration in designing Epic for our institution. As a lead physician in the Epic implementation, it was very helpful to me to have the Encore consultants advise as decisions were being made and to help me promote the Epic design to be appropriately centered around the work flow of the nurses and physicians.”

Carolyn Bengtson MD, MBA, CPE  
Chief Medical Process Officer



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- Monitoring effectiveness of Super User deployment during Go Live and manning the Physician Resource Center during go live weekend.
- Creating How to Pocket Guides for Physicians to be used during go live, which contained easy references for basic activities in Epic that Rockford would use in their daily workflow.
- Advising project leadership on Communications Strategy and Cutover Planning.
- Participating in Meaningful Use committee activities.
- Working with Rockford and vendor staff to ensure that their needs were met while implementing the model/foundation Epic system with a focus to utilize the Rockford resources on the essentials to build for go live rather than those items that truly could wait for optimization post go live.
- Recommending workstation hardware and locations for Neonatal Intensive Care Unit (NICU) and the Emergency Department.
- Collaborating with build teams involved in HOD build (ClinDoc, Orders, Interface, HIM, Cadence, Rev Cycle, Radiant, Willow) to develop current state assessment for the HODs and future state workflows.
- Completing a gap analysis for HOD training content with recommendations for curriculum structure and created a comprehensive HOD for a user-training database.
- Managing Rockford’s triage phones throughout the first two weeks of go live.



### RESULTS

Encore’s advisory, testing, cutover, and go-live support helped Rockford to proceed successfully with the go live on April 27, 2013 as scheduled and planned. Prior to go live, Encore updated many of Rockford’s policies and procedures, which were subsequently approved by Rockford’s Review committee. Encore’s consultants also provided Rockford with several tools that the organization could use during and after the implementation to maximize their investment and increase the success of future projects.

Encore’s involvement also led to several lessons learned for Rockford, particularly concerning workflow development. By identifying gaps in Rockford’s workflow documentation, Encore was able to help Rockford recognize the essential role workflows play in the development of a roadmap for build and decision-making that will ultimately affect the end-user interaction with the system. Encore’s analysis and resulting actions created an environment for Rockford’s analysts to have access to the most accurate documentation available, while providing a forum for regular engagement of stakeholders in workflow discussions. These best practices would allow the Rockford team to maintain a clearer perspective of the most up-to-date and approved workflows prior to undertaking build activity. By encouraging Rockford’s nursing staff to examine its workflows more closely, Rockford was in a better strategic position to save time, increase accuracy, and decrease the number of changes required for its workflows.

Sue Schreier, Chief Nursing Executive (CNE), and Doreen Timm, Registered Nurse (RN) and Clinical Champion, praised Encore’s approach and guidance, thanked consultants for a job well done and expressed regret over not having had the opportunity to work with Encore’s consultants much earlier in the project.

Additionally, the following individuals all expressed their appreciation and gratitude for Encore’s successful advisory, facilitation and delivery roles in Order Set design and validation and for Encore’s consistent, accurate guidance throughout the project: Dr. Carolyn Bengtson, Physician Champion/CMIO; Cindy Childers, Project Director; Dennis L’Heureux, CIO; and Connie O’Rourke, PM Orders and ClinDoc. 

