

# Your Guide to Implementing Trust-Wide Electronic Health Records in the UK



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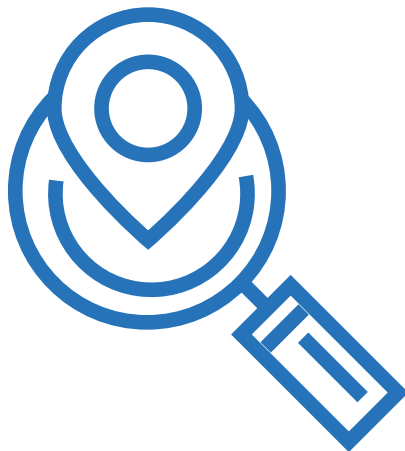
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Like many healthcare organisations around the world, the NHS faces a huge challenge in making sure it is fit to respond to ever-changing demands on the healthcare service and remains in a healthy position to take on the challenges of the future. Undergoing digital transformation is essential to overcome these challenges and achieve a health and social care system that is faster, more effective, delivers more personalised care, and complies with evolving NHS digital care requirements and initiatives.

In June 2022, the UK Government set out its plan for Digital Health and Social Care, including committing £2 billion of funding to support electronic patient records (EPR) in all NHS trusts. Specifically, the policy paper set out the aim for “all NHS trusts (to have) an EPR system by March 2025 (90% by December 2023 and 100% by 2025).”

In joining up a lifetime of health and social care records, the Government’s expectation is that by March 2025, all clinical teams in an ICS (Integrated Care System) will have appropriate access to a complete view of a person’s health record, including their medications and key aspects of their history.

## About Medix and this Guide

At Medix, we aim to positively impact lives with data driven talent solutions. Our ability to deliver such quality solutions has seen us gain the trust of organisations around the world from the U.S. and Canada to Belgium and the UK. To date, we’ve supported more than 125 Epic EHR implementations with our advisory and recruitment services, ensuring organisations had the right expertise to take on this mighty task.

With our significant implementation experience, we have seen the common pitfalls of EHR implementation projects and want to help other organisations avoid them. This guide arms organisations with the keys to achieving a successful implementation, guidance on establishing your project governance and insights about assembling an optimal implementation team.



**£2,000,000,000**

UK government commits £2bn to support EPR in all NHS trusts with the aim for complete access to a person’s health record in an ICS by March 2025.

## Your EHR Implementation Plan: The Risks of a Poor Implementation

With a transformative IT project of this kind, there is a lot at stake. Having a robust implementation plan is key to a successful delivery. If you do not have the right processes, people, and plan in place, you face the following risks, to name a few:



**A non-customised system that is not fit for purpose**



**Incomplete or inaccurate patient records**



**Disengaged staff who aren't willing to learn how to use the new system or contribute to its implementation**



**Time delays**



**Exceeding the planned budget**



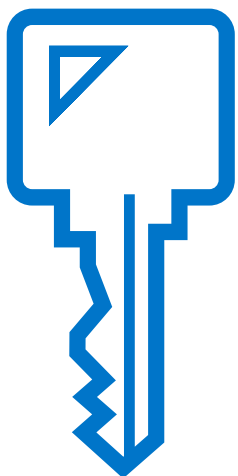
**Failing to achieve goals set out for the project  
(i.e. not meeting NHS digital care standards)**



**A team that is not set up to support and nurture the system long-term**

## 10 Keys for a Successful Implementation

Throughout our experience partnering on delivery of hundreds of Epic health systems, we've identified 10 keys to ensure a successful EHR implementation:

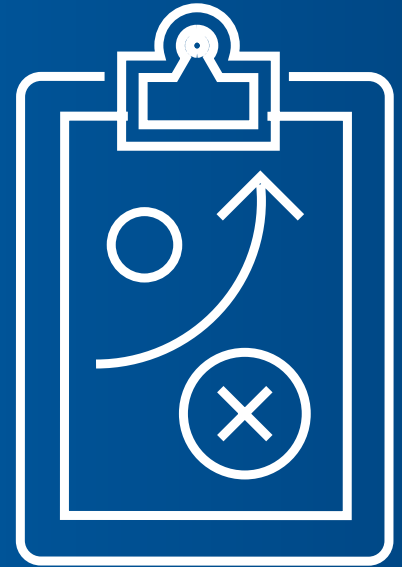


1. Build a pre-implementation plan to support a successful EHR delivery
2. Develop a staffing plan that will deliver both implementation and long-term success
3. Build an effective governance model
4. Plan for external dependencies beyond your EHR
5. Develop an optimal hosting strategy
6. Set key guiding principles to enforce during the implementation
7. Have a plan for when something veers off track
8. Invest in operational readiness
9. Follow the Epic implementation methodology
10. Engrain the mindset that the journey is only starting at go-live

## 1. Build a pre-implementation plan to support a successful EHR delivery

There are a variety of activities which can be started months prior to beginning an implementation that will mitigate any associated risks. These include scope refinement, timeline planning, go-live sequencing, third party identification and cost planning, development of a TCO (Total Cost of Ownership), optimal staff identification, evaluation of current operational initiatives and IT projects.

Dedicating time and resources to these activities before implementation not only reduces risk during implementation but also ensures closer adherence to timeline and budget and aids outcomes and long-term success. Leveraging Epic, partners, and other Epic groups who have blazed the trail before you can be very helpful during this period.



## 2. Develop a staffing plan that will deliver both implementation and long-term success

With your task list in hand, you can consider who will form part of the EHR implementation project team and decide whether they'll be sourced internally or externally. Most likely, it will be a combination of the two. Source as many roles as you can from within your organisation as you are building a team with the long-term in mind. Consider leveraging experienced consultants for positions which won't



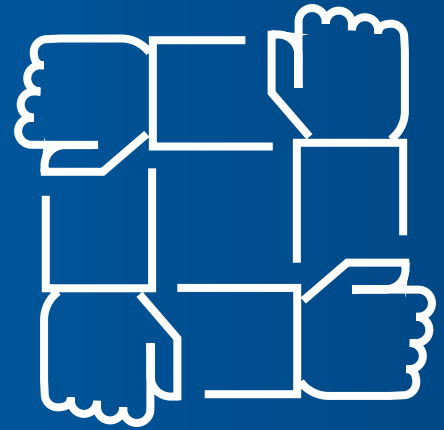
exist after the project, to support new leaders, and/or for more complex areas either unique to the UK (e.g. UK PAS) or your organisation. Build a plan for retaining your staff long-term. There will be competitors in your region, including future Epic implementations, that will seek staff that have Epic experience and certification in the UK. There are a variety of strategies you can deploy to retain this talent, which will be critical for preserving the knowledge you have developed over the course of the implementation. Some organisations have historically put plans in place to roll staff off and move to long-term support shortly after go-live. Making sure this shift is gradual and doesn't happen too quickly is key.

### 3. Build an effective governance model delivery

It's unlikely that groups implementing Epic will have their users transitioning from one singular EHR system in the UK. This often means that end users haven't been used to collaborating on decision-making at trust level. Identifying the right governance structure, but even more importantly, the right individuals to have in place is critical.

When assigning members to your governance committees, avoid just taking "volunteers" or even the "tech-savvy" clinicians or users. You want the influential individuals within your health system who are well-connected, respected, have a good understanding of current operational processes, and can bring back decisions to their particular area to enforce and translate the impact of a decision operationally.

Start by assigning your executive steering committee and cascade down from there with the individuals at the layer above selecting the individuals to support them at the layer below. Time well spent as you get this model in place will be developing practice decision making scenarios to begin to test your newly formed governance committees. This will aid with readiness and develop a rhythm of rapid but thoughtful decision-making allowing you to meet the pace of your implementation schedule.



### 4. Plan for external dependencies beyond your EHR

While a trust-wide EHR will make up the large majority of your IT ecosystem, you will still have other systems and resources that persist after implementation as well as legacy systems which remain running during your EHR implementation. Ensuring you have a firm grasp on what these third-party solutions will be, the vendors you will utilise, and the associated pricing and resourcing is an important step prior to beginning your EHR journey.

Third party contracting can be one of the factors delaying an EHR implementation due to the volume of contracts that may need to be executed, the time it typically takes to complete those contracts internally, and the associated dependencies in the EHR program relying on contracts and third-party work.

Avoid going with the cheapest quote for a particular solution, and ensure you perform due diligence on the firms that integrate optimally with your EHR with the best results. Finally, plan for the legacy systems that will persist during EHR implementation but disappear after you go live with your EHR. Identify opportunities to run those systems in a "keep the lights on" capacity so you can keep systems running but allocate more budget and capital into your new EHR investment.

## 5. Develop an optimal hosting strategy

There are a variety of hosting options that can be deployed to support your EHR. We've seen more and more groups finding success when they are looking with a view of where they want to be 10-15 years from now, rather than necessarily selecting the cheapest solution or the one which will solve minimum requirements today.

Similar to your EHR, you'll want to avoid making a major investment in equipment, resources, and/or a vendor who you might need to replace further down the road. Solutions here include self-hosting, cloud hosting, third party hosting, Epic hosting, and some minor variations between these options. We are seeing a trend in moving away from self-hosting, but each of these options have benefits and considerations that are best evaluated with a long-term view in mind.



## 6. Set key guiding principles to enforce during the implementation

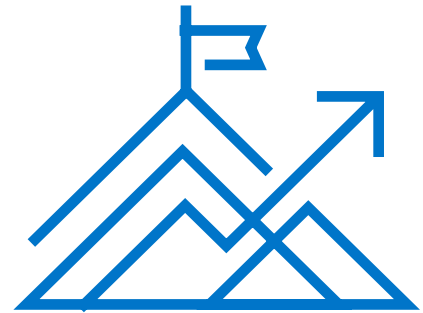
Setting guiding principles allows leadership to anchor all staff members and IT implementation support to a particular set of standards for the install that align with the goals they hope to achieve. By setting these early and at the top level of the organisation, it sets standards in the way that the implementation will be run, decisions will be made, and how the end user community will guide the install. Examples are principles such as, 'all users will be required to complete training and pass the associated test to practise' and 'decisions will be made that allow for standardised care rather than custom workflows'.

Leverage examples from Epic, partners, and other established healthcare systems and merge those with your culture and implementation goals to arrive at a set of guiding principles for your organisation. Make a habit of displaying these at the start of every meeting during the implementation and referring back to them to aid with adherence and ultimately to help you achieve your EHR implementation goals.



## 7. Have a plan for when something veers off track

There will be tasks, milestones, and teams who will veer off track during the implementation. Now that you are no longer implementing a system in a silo, and all the parts are connected as part of an enterprise EHR implementation, a misstep from one team can impact other teams who are reliant for dependencies. For example, if a third-party contract is delayed, there may be work in the third party or interface setup that needs to occur, in order for the EHR team closely connected to that third party, to progress.



You will encounter this first when inevitably there will be individuals who struggle with the project team certification process. One of the steps you can take early on is to develop a risk tracker outlining the project-level risks you are anticipating, based on learnings from Epic, partners, and other health systems. Build that out, manage it, add to it as new risks arise, and localise it at the team level.



Part of this documentation process includes the development of backup plans and levers which can be pulled in the event an area falls behind. Much of this can be planned for in the pre-implementation stage by developing a robust risk tracker and effectively planning for contingency in your TCO, but it requires active management over the course of the implementation to ensure one area falling behind doesn't put the rest of the project at risk.

## 8. Invest in operational readiness

Operational readiness activities can be one of the first areas that get cut when other areas of an EHR project fall behind. Many operational readiness activities require involvement from the project team and it is paramount to put steps in place to ensure that these operational readiness activities survive. Allowing end users opportunities to understand how changes will impact them as well as opportunities to use the system are critical in aiding with user adoption of the new system.

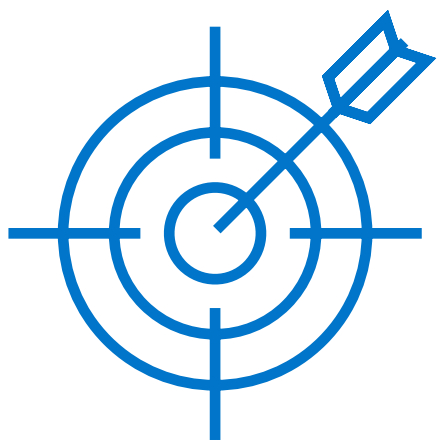


Activities such as a workflow dress rehearsal, utilisation of an EHR playground environment, and personalisation labs offer users the opportunity to use the system and/or localise the impact of the EHR on their day-to-day workflows. Spending time and money on these activities on top of standard EHR training can be seen as a cost but is an investment well worth making to ensure your end users are

## 9. Follow the Epic implementation methodology

One of the many benefits of working with the top EHR vendor in the space is they have hundreds of implementations that will have preceded you as a new customer of theirs. In the UK, there are already many trusts and health systems that have migrated to Epic. As a result

of this experience, they can offer best practices from the best health systems and have a tried-and-true methodology from their vast experience. There are principles they will instill as part of their install methodology and the key here is that you avoid attempting to reinvent the wheel.



By leveraging Foundation System workflows and sticking to best practice you are able to best position your EHR for the future by minimising customisation. Standardising practices and following the “best of” that have gone before you enables you to achieve similar benefits and optimise for content that is released in future releases whilst minimising your team’s footprint by avoiding any customisation required for the variation that exists when new releases come out.

## 10. Have the mindset that the journey is only starting at go-live

Finally, but perhaps most importantly, the journey only begins at go-live and it's important to build plans that support this mindset. The multi-year effort of implementation can bring a sigh of relief once you reach that important go-live event, but simultaneously your users are using the system for the first time and they will need support, while the system will need nurturing.

We briefly discussed making sure you don't move to long-term support staffing levels too early. You can plan for this overall mindset by putting budget, activities, and checkpoints in place to support this initiative. This often comes in the way of post-live training, leveraging tools to optimise end user satisfaction and efficiency, meeting with governance committees to optimise workflows now that users have the chance to use the system, tracking the realisation of benefits and pulling levers to ensure they are met.



Set goals based on the benefits you outlined to achieve as part of your implementation as well as the tools Epic has available to compare you to other customers such as Gold Stars or KLAS with the Arch Collaborative. By establishing this culture with your team and organisation, you can be among the best when it comes to your metrics, benefits and end user satisfaction.

## Establishing your Project Governance

A multi-tiered governance structure will need to be composed of representatives from Executive Leadership, Operations, Clinical Leaders, Information Technology and front-line representatives. During an active implementation, representatives from Epic and your project team will attend the appropriate governance meetings to provide support and knowledge of best practices, but these governance groups are led and managed by your employees.

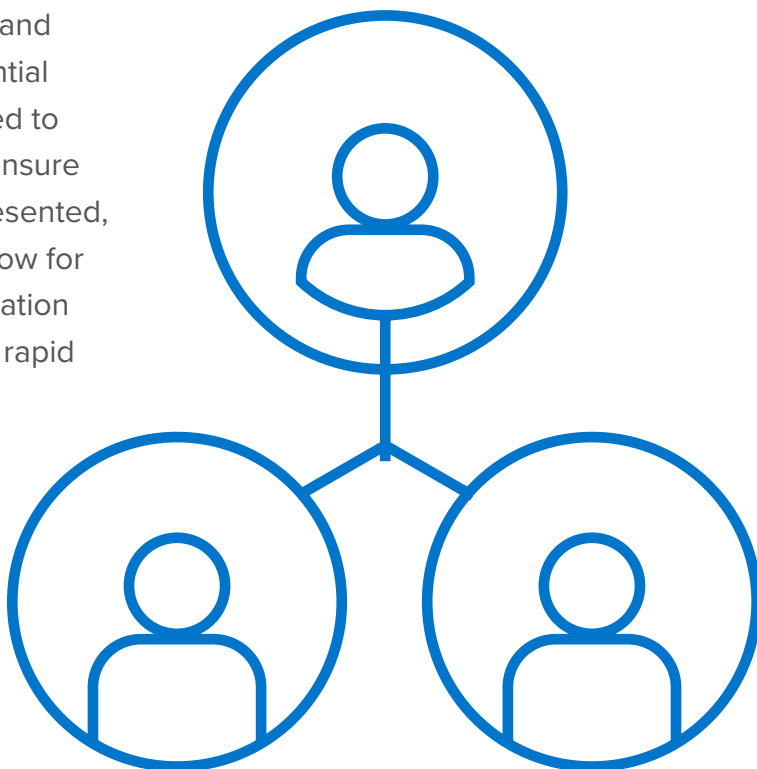
A sample structure below is provided as a starting point for designing a programme governance structure that is closely aligned with the standard Epic recommendations. It incorporates existing governance and decision-making processes and is tailored to reflect Epic and third-party applications within scope.

## EHR Governance Model & Integrating IT



Your programme governance structure should draw upon experience and knowledge of Epic and industry best practices while leveraging your own existing structures and organisational processes for rapid, efficient decision making and change management.

An efficient process for shared decision-making and rapid escalation and resolution of issues is essential to a successful implementation. You will also need to consider an administrative support structure to ensure meeting agendas, decisions and minutes are presented, documented and communicated efficiently to allow for coordination between groups with a clear delineation of responsibilities and a schedule that allows for rapid resolution.



# Assembling your EHR Implementation Team

## Programme Leadership and Project Management

One of the first areas you will recruit will be your programme leadership and project management positions. An Epic implementation plan should minimise dependence on expensive external resources long-term while allowing for senior expertise to guide a health system that has not been through an Epic implementation before. Once you have evaluated internal candidates for these positions, there may be some key places where you would benefit from senior external management resources.[RC40]

When implementing an Epic system, it's important to recruit programme leadership and project management positions.

Examine the positions in your Epic implementation plan to determine the modules and areas your managers will cover. Where you have individuals internally who have served in management positions over those operational or IT areas, consider them for these positions. You should consider individuals who have experience working with the end user groups for the modules they'll oversee and/or have IT management experience in those areas. You will also want to consider candidates who have people management experience.

At the application management and programme leadership level, you may consider placing key consulting resources with rich Epic experience. Pairing a senior project manager with expertise in a particular area (i.e. Inpatient Applications) with a management resource from your team in a two-in-the-box fashion will help guide you through the course of the implementation, and set you up for long-term success. A consulting resource may also be useful in a management position which is needed during but not post-implementation.

## Application Analysts & Implementation Team

Typically, 60-70% of the entire cost of an Epic implementation is allocated to people: subject matter experts, internal transfers, Epic Systems implementation staff, and project consultants. An Epic implementation plan should ensure you have the right blend of these resources allocated efficiently. We've seen organisations have the most success when they staff the majority of their implementation team from within so they can leverage the internal knowledge and resources they've gained through the install. Your experienced resources will apply their Epic implementation experience towards efficiently completing implementation activities while taking the time to mentor and advise their less experienced colleagues.

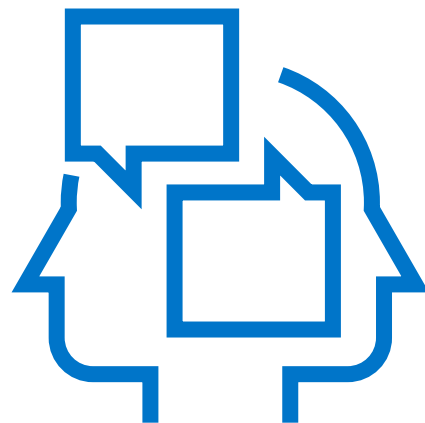
## Recruiting the Right Skill Sets for Success

An effective Epic implementation team is driven by finding staff with the right skill set and behaviours which align with your health system's culture. Beyond determining staffing needs and role responsibilities, you will need to understand the positive behaviours and traits you would like to see in your top team members so you can build a team of high performing individuals. You have one shot to get your new electronic health system right and the implementation team you assemble will be a critical component to its success.

One of the initial steps in assessing the traits of your current employees will be utilising a behavioural assessment tool. A behavioural assessment tool will allow you to gain insight into complex data on your whole team's general personality and work motivators. Once obtained this data will provide you with one of the first pieces of information to guide selection of the right talent to join your team.

A second step you can take is using the Epic Sphynx assessment tool. We utilise this aptitude test for staff we place at health systems [RC43] because it provides a very strong correlation between success on the test and staff being successful working on an Epic project.

By combining the results of this test with a behavioural assessment, you will have very strong insight into which of your current pool of candidates for the implementation team have the best chance of success. Leverage those insights to determine any areas where you may be best suited to use a partner to fill a staffing gap. These individuals can fill gaps that can't be filled internally, they can fill positions that will no longer be needed after implementation, and/or can mentor your staff through the course of the implementation to set them up for better long-term success.



## Conclusion

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Our goal here is to help you mitigate risks associated with costs, time and patient record accuracy. Problems with any of those, and particularly with a combination of those, can affect your organisation's profitability and, more importantly, your patients' health. Countless organisations have experienced these problems during and after implementations, and to us, it is an unacceptable outcome. On the contrary, we have seen so many hospitals and health systems realise outcomes that are on budget, on time and immediately beneficial to their quality of care.

You have a difficult but rewarding job ahead of you. Migrating to any new EPR is a significant challenge. By selecting Epic you have taken the first step on a journey to leveraging your enterprise electronic patient record system towards improving medical outcomes. We hope the best practices captured in this document will aid you on your path to a successful implementation. There's only one chance to get it right, so having software, guidance and an expert, flexible partner who becomes an extension of your team is key to a smooth delivery.

## About Medix

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Medix positively impacts lives and businesses by providing healthcare, life sciences, technology, and engineering talent solutions to businesses and government institutions. Our national reach, decades of industry expertise, and nimble talent engine have made us a trusted talent partner to hiring managers and HR teams at hospital systems, Fortune 500 firms, fast-growing startups, and industry disruptors. We've already supported more than 125 Epic EHR implementations for organisations around the world and are proud to play a part in transforming healthcare records and services for the future. For more information about how Medix Technology can be a trusted partner in your EHR implementation, visit [www.medixteam.com/solutions/technology/](http://www.medixteam.com/solutions/technology/)

