Recommendations for Epic Training Success after Go Live

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Go live is not the end. It's the beginning.

This is a phrase that we've heard, and used, countless times during Epic implementations. And it's as true in the training world as any. Getting all of your users trained prior to go live is an enormous task requiring effective management of time, resources, budgets, materials and environments.

Keeping your staff trained and supported after go live is no less daunting. Below are key observations and recommendations to keep your staff educated and refreshed on the latest and greatest workflows and functionality in order to maximize their efficiency.

- **Use Epic's latest functionality** – New functionality is consistently being released to either address software issues or provide better mechanisms to complete workflows. In fact, your users have likely requested many of these updates at some point in time. Providing them with the latest updates not only improves their confidence, but lets them know their collective voices have been heard. It should make them increasingly efficient users of Epic. Avoid the functionality gap (i.e. the increasing divide between your current state and Epic's capabilities.) The wider this gap becomes, the more challenging (and costly) it will be to catch up.
- **Use Epic's latest training materials** – Just like the software itself, Epic updates its training materials with each release. While these are based on the Foundation System, they are a tremendous building block for your customized materials. The updates reflect changes in the software gathered from hundreds of Epic clients. The updates also represent the latest in adult learning techniques, addressing all types of learners. Epic wants your users to be effective users of its software. To do so, your users must be effectively trained and Epic is trying to provide you the best starting point it can. Take advantage.
- **Keep training environments refreshed** – Far too often, we visit clients that have been live for over a year and their training environments do not reflect their Production environment. It's not an easy task, but your users cannot effectively learn how to use Epic if the environment they work in is different than the one in which you train them. Your analysts and training team must have a communication tool (i.e. build tracker) that is shared so all updates can be equal. Too often, training team members and build analysts are not communicating, causing important items to get lost in the shuffle. When your trainers are forced to say 'you'll only see this in training' or 'in real life…,' it's time to make sure all the training environments are current and possibly rebuild your master training environment.
- **Have a central, accessible repository** – Whether it's Epic's Learning Home Dashboard or an internal tool, it's imperative to provide users with a 'one-stop shop' for training materials. E-mailing tip sheets or other materials is not an effective distribution method. Users should have access to a dedicated repository, ideally directly from their Epic log-in. If they need a document or are just curious, it's more efficient to look in one place than to try and locate old e-mails … if they were even opened in the first place!

- **Use e-Learning where effective** - E-learning can be a tremendous tool for training users. It is not, however, a substitute for classroom training. Some topics require personalized instruction and the ability to ask questions in order for the material to soak in. E-learning should not be used in place of classroom training due to resource or budget reasons. Seek Epic and user input on topics that can be effectively learned from e-learning. The ultimate goal is effective training. Well-educated users become increasingly efficient. In the long run, efficient users increase your bottom line.
- **Tailor training courses and materials** – Training should be focused on the user, not the functionality. From our perspective, we encourage creativity. An 8-hour class that trudges through one Epic activity after another will have limited effectiveness. We hear this feedback from users consistently. Instead, consider a 4-hour class on the basics followed by a 4-hour class on the user groups' most repetitive workflows. For example, learn how the physicians spend their days and focus the training on how their time will be utilized to complete requirements within Epic. Show the physicians how to respond to medication refill requests, how to respond to patient messages from MyChart, etc.
- **Save tips and tricks for later** - We are advocates for personalization! But if you attempt to push this to new users while they're just trying to consume basic functionality and workflows, the impact will be negligible. Set up separate training sessions for saving SmartSets, Preference Lists, InBasket Quick Actions, etc. Users will increasingly understand the benefits after their basic foundation is in place and they are utilizing Epic daily.
- **Engage your trainers with users regularly** – Your training team should be known and visible to users well outside of the classroom. We recommend attending regular department meetings to demonstrate tips and tricks and to gather feedback on problem workflows. We recommend users being able to request 1:1 support if needed. User training never ceases. It only evolves after go live.
- **Be a united front** – Training is a team. It's not the Ambulatory training team vs. the Inpatient team, or the Cadence training team vs. the Grand Central training team. Understand that your users don't see (and likely don't understand) different applications. They see 'Epic'. They log in and access one system. Their workflows likely touch multiple Epic applications. So to effectively train them, you can't have imaginary boundaries. This may require some cross-education. It will definitely require collaboration. But it's essential that your users' training teams and training materials are as integrated as their workflows in Epic.

This list is not exhaustive. It's merely a collection of recommendations we've gathered from over 10 years of assisting Epic clients after they are live. Like you, we want your users to be happy, efficient and effective and we feel these tips can go a long way to ensure this conclusion.

We're always excited to hear feedback or to discuss any aspects of your Epic deployment. Please don't hesitate to check out www.cpcit.com or to reach out to us directly at bbeinborn@cpcit.com or svickery@cpcit.com.