

# 5 PHASED APPROACH TO AN EPIC UPGRADE



The same five-phased approach that most customers utilize during an initial Epic implementation should be replicated for an upgrade. It is highly recommended that an upgrade be led by a strong Project Manager who not only has excellent use of project management tools and methodologies, but also possesses several years of Epic application experience along with a solid understanding of the technical infrastructure used to support and run the applications. Due diligence should be given to the development and execution of plans that support all five phases of the upgrade project.

1

**PLANNING** | There is a critical need to view an upgrade as a 'collaborative' effort that impacts the entire organization. Therefore, the initial upgrade planning discussions should include the appropriate key decision makers from across the organization along with the upgrade project manager, the technical team lead, application leads and an Epic technical coordinator. An ideal forum would be a half-day workshop/retreat where a sufficient amount of time can be given for discussion.

2

**BUILD** | Second only to the Master Project Plan, NOVA is the most important project management tool for an Epic Upgrade. Nova is the primary source of information about application changes included in the new release. It is imperative that NOVA be used as a review tool & reference database for Enhancements and Release Notes, but it must also serve as the "source of truth" for documenting and managing the changes that will be implemented with the upgrade.

3

**TESTING** | It is a given that any change requires some level of testing to ensure that the functionality works as designed, the outcome produced meets expectations and that the end user experience is not negatively impacted. No matter how much change is introduced a well-defined comprehensive testing plan for Epic upgrades is a necessity.

4

**TRAINING** | All changes related to an upgrade require some form of communication that informs end users about the change and how the change impacts their use of Epic. There is a direct correlation between the amount and complexity of these changes and the delivery method chosen. In many cases, for minor changes, a simple tip sheet will suffice. Many customers make use of pre-recorded videos or Webinars to provide demonstrations of new features.

5

**GO LIVE PREPARATIONS & SUPPORT** | It is inevitable that as the Go Live date rapidly approaches, there will be unresolved reported issues to Epic for which Sherlock tickets have been opened. It is prudent to review the list of open tickets with key organizational leaders or project stakeholders so that they are aware of those outstanding items. The organization must determine if the remaining open issues are of a critical nature that pose any significant threat to patient safety or other serious concerns.

After the February release of version 2018 (v2018), Epic began their 3-month release cycles in August 2018 to combine new features with fixes currently delivered as part of their Special Update (SU) packages.

As part of the change, Epic is providing an 8-week project plan to guide organizations in balancing their maintenance with strategic initiatives. While this is an adjustment for organizations, it'll be a more significant adjustment for organizations that are a few versions behind v2018.



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