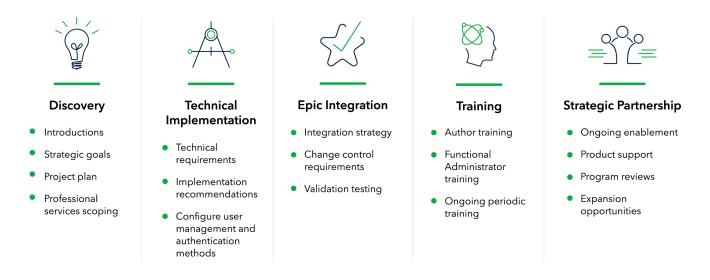# uPerform

# Implementing uPerform® for Epic

Interested in using uPerform for Epic? The uPerform team and your Epic analysts will help you get there. Outlined below are a few of the workstreams involved in a uPerform implementation for Epic. We're committed to working with you to determine a project strategy and integration path that best fits your needs and makes your uPerform rollout successful.

### Discovery
- Introductions
- Strategic goals
- Project plan
- Professional services scoping

### Technical Implementation
- Technical requirements
- Implementation recommendations
- Configure user management and authentication methods

### Epic Integration
- Integration strategy
- Change control requirements
- Validation testing

### Training
- Author training
- Functional Administrator training
- Ongoing periodic training

### Strategic Partnership
- Ongoing enablement
- Product support
- Program reviews
- Expansion opportunities

## Project Strategy

The uPerform team works with you to conduct a planning, analysis, and design session to gather your requirements and then, based on our experience and best practices, we collaborate with you to make decisions on options, customizations, configurations, and integrations for our software. We work with your organization to develop a comprehensive strategy and project plan, outlining the roles, tasks and target dates associated with the rollout, providing visibility and peace of mind to all stakeholders involved. Planning with you and using our experience with other customers, our Professional Services experts will assist you in determining the most effective project plan that meets your goals and end-user needs.

## Epic Integration Plan

We work with you and your Epic analysts to develop an integration strategy by evaluating points of need to recommend the best implementation option(s) within Epic that meet the needs of your end-users and the goals of the project. Our team gathers any change control requirements and approval processes your IT department requires as part of the integration and incorporates them into the project plan, so stakeholders are aware of all approvals needed and the timeline associated with completing the integration. We support you through the entire integration process, including verification of approach, integration within your various environments, and validation testing along the way.

## Author and Administrator Training

Our Professional Services experts deliver author and administrator training sessions to ensure your administrators

and content producers are equipped with the knowledge to utilize the uPerform software effectively. These sessions are scheduled based on the availability of your team members and can be conducted in-person or virtually.

## Ongoing Enablement

As your organization looks to rollout uPerform more broadly, new authors or administrators need to be trained on how to use uPerform. We coordinate virtual author and administrator overview sessions periodically, so new members of your team or project can start generating uPerform content quickly.

After uPerform for Epic has been rolled out successfully, we remain in touch with you by organizing monthly checkpoint discussions. The uPerform team evaluates your uPerform configuration quarterly by reviewing uPerform analytics to determine what's working and what's not. Our team of experts provide recommendations to help improve the expansion and adoption of uPerform across your organization.

## Technical Implementation

The uPerform team provides documented technical requirements, including recommendations based on our experience with other hospitals, to support a successful technical handshake between Epic and uPerform. By doing a bit of work upfront, your Epic users will have exactly the right information when they need it, and we're here to support you every step of the way.

## User Management/Authentication

uPerform integrates with Epic using Epic SSO which provides end-users with a seamless transition from Epic to uPerform learning content and back again. Content can be filtered or restricted based on user role or group assignment using XML import. We work closely with your IT team to enable these features, so you can feel secure about identity management and know your learners are getting highly relevant performance support exactly when they need it.

## Continuous Support

At the start of your implementation members of our team are assigned to you as part of a rapid onboarding and enablement approach. This dedicated team of uPerform experts continue to track project progress, provide dedicated support, and help expand the uPerform program to different groups and applications throughout your organization.  https://www.ancile.com/uperform-for-epic/

## Required Resources

| Workstream | Client Resources Required |
|---|---|
| Project Strategy | • Program owner<br>• Project manager<br>• Epic analysts<br>• Epic training lead(s)<br>• IT administrators |
| Epic Integration Plan | • Program owner<br>• Project manager<br>• Epic analysts<br>• Epic training lead(s)<br>• IT administrators |
| Author and Admin Training | • Epic training lead(s)<br>• uPerform functional administrators<br>• uPerform authors |
| Ongoing Enablement | • Program owner<br>• Project manager<br>• New uPerform functional administrators<br>• New uPerform authors |
| Technical Implementation | • Project manager<br>• IT administrators<br>• uPerform functional administrators |
| User Management/ Authentication | • Project manager<br>• IT administrators<br>• uPerform functional administrators |

# ANCILE