

# SUMMARY OF EPIC USER CALL #5

NOVEMBER 19, 2020

## Introduction

A 2020 survey conducted by the DISQ team on Electronic Health Records (EHRs) and the Ryan White HIV/AIDS Program (RWHAP) found that Epic Systems (Epic) is a commonly used system among RWHAP providers. On November 19, 2020, the DISQ Team hosted a meeting with providers who use Epic to discuss strategies, challenges, and best practices for using Epic to manage RWHAP data and complete the RWHAP Services Report (RSR). The DISQ Team conducted four previous calls with Epic users in 2019 and early 2020. The notes for these calls can be found on [TargetHIV](#). This memo describes how Epic users create the COVID-19 Data Report (CDR), employ strategies to import data from Epic into an RSR-Ready System, and use the Ryan White module. Contact information regarding attendees has been shared with their permission. Email the DISQ team if you would like to be connected to another Epic user or if you need assistance with Epic and do not have your representative's contact information.

## Creating the COVID-19 Data Report (CDR) Using Epic

An attendee reported that they extract data from Epic and determine how many patients received a visit and how many COVID test results they received. They also acquire a state report for patients who received a COVID test outside of their facility. After this, they upload the data directly into the EHBs. The attendee does not use CAREWare as part of CDR data reporting.

## Utilizing the Ryan White Module

The Ryan White module is a new feature within Epic that allows the user to generate the RSR XML file. Multiple attendees reported having issues with the new Epic Ryan White module. The DISQ Team noted that previously users had reported that they were not planning on using the Ryan White module because they had processes in place to create the XML and they found it unnecessary, but now it is being utilized and no one has been able to use it successfully. Issues included:

- Call attendees reported an inability to create the specific data elements needed for the RSR and electronically import lab data.
- Another attendee was struggling with being required to access the Ryan White module to verify information and manually enter CD4 and VL data which can only be done if there is an open encounter, but this is only accessible by clinical nurses and providers. Since they can't verify and enter data in the Ryan White module, it is impossible to run reports.
- Another attendee stated that the Ryan White module doesn't interact with a third-party vendor.

- Another caller stated that their agency previously determined that the Ryan White module would not work for them because they have multiple funding streams and a process in place to create the XML. This attendee believes that there must be some changes in the Ryan White module that has contributed to an increase in its use. With that said, it would be beneficial if a representative from Epic can attend a future call to answer the questions about the module.
- Lastly, a call attendee indicated that there a link to an Epic user web group that can be accessed [here](#). This link provides access to a webinar about the module. To access the link, you must have the Ryan White module and sign in through your organization. This caller agreed to send a PDF guide on how to navigate this site.

The DISQ Team agreed to share these issues with their contacts at Epic so challenges can be addressed and solved.

### **Importing Data into an RSR-Ready System**

Many Epic users import data into an RSR-Ready system to create the XML. This section describes the approaches some users implement to create the RSR.

- A caller stated that they use Epic as an EHR and ARIES as an RSR-Ready System. First, they create a patient profile in ARIES. Once they acquire a unique ID from ARIES, they generate an XML in Epic and import it into ARIES. Each patient has an ARIES ID in Epic to facilitate the import.
- Call attendees from TX stated that the state is planning on switching to a new system by the end of 2021 or early 2022. Even though the state is moving from ARIES, providers still need to figure out how to effectively utilize Epic.
- Another caller has created their own queries in Epic and every 15 days they import all the data (visits, labs, immunization, poverty level) into CAREWare using the Provider Data Import. After this, they use a third party to create the XML. They want to remove the excess work by electronically importing data from Epic to CAREWare.
- Mission decided it was best to organize Epic subtopic calls (e.g. Epic and CAREWare and Epic and ARIES) because there are challenges agencies are facing with different data needs depending on what data system is used.

### **Ryan White Dashboard**

Another attendee, having recently transitioned to Epic, cannot view data on their Epic dashboard and are struggling to collect the necessary data for the CDR and the RSR. At the moment, they are extracting data from Epic and importing it into CAREWare, but the Epic dashboard is not displaying any of their data.

### **Capturing Missed Appointments**

An attendee stated that they are trying to capture patients who haven't had an appointment in 6 months. A caller suggested that they can build a report that can capture no show appointments.



This attendee offered to send screen shots of this report that can be tailored to fit a program's need.

**Quantifying Free Text Data**

An attendee reported having issues quantifying free text data in Epic. It was suggested that they can use smart links to do this. These callers agreed to connect with each other offline.

**If you have questions, please reach out to the DISQ Team at [data.ta@caiglobal.org](mailto:data.ta@caiglobal.org).**