

Epic HealthySteps Turbocharger Package (TCP)

What is a Turbocharger Package?

A turbocharger package is a collection of records created by Epic that can be quickly and easily imported into your existing system, enabling you to integrate the delivered content into your desired user workflows.

The HealthySteps Turbocharger package includes designs for Epic workflows including:

- Collecting Patient Entered Screening Questionnaires
- Documenting a HealthySteps Tier Level
- Documenting a Patient Encounter for HealthySteps Specialists
- Documenting Referrals to Support Services or Community Based Organizations
- Reviewing Past HealthySteps Encounter Documentation
- Filing Billing Charges for Eligible HealthySteps Services
- Tracking Program Fidelity Metrics and Patient Population Statistics

What is the minimum Epic version for the HealthySteps TCP?

The earliest version that the HealthySteps TCP can be implemented in is Epic's November 2023.

What is the expected timeline for a site to implement the Epic HealthySteps TCP?

Every health system is unique, and many factors must be considered for an accurate timeline. Nordic estimates 2-3 months from project start to go-live when Nordic consultants lead the implementation; this estimate may be extended where extensive customization requests or specific site needs are scoped into a project plan.

What is the cost to use the HealthySteps TCP?

There will be no cost to download the HealthySteps TCP or use the workflow and content once it is activated. There may be costs associated with properly configuring the HealthySteps workflows in your Epic software as part of the activation process. Please reach out to lfritz@zerotothree.org to learn more about the activation process and explore options for additional support.

Does a site need a full time Epic analyst to maintain the workflow?

No. Once the HealthySteps TCP workflow is implemented, very little ongoing maintenance will be necessary. Any future customization requests or additions to the workflow can be completed as standard ticket requests to your health system's Epic team that will maintain the workflow after implementation.

Does the HealthySteps TCP create new SmartData elements, or would we need to create all of them and then map them all?

Epic has built out standardized SmartData elements to that will be mapped to the HealthySteps SmartForms. They will be properly mapped in the TCP so you will not have to create and map them to implement the documentation workflow.

What institutional issues or roadblocks did you encounter in creating the workflow?

Change management processes and IT governance guidelines and approvals are the most common elements at any health care system that can slow progress on similar projects. Fortunately, we were able to maintain a close working relationship with the pilot sites' Epic IT staff for testing and validation support, which helped overcome/avoid those roadblocks.

Can we still use the Epic Implementation Playbook?

The HealthySteps Epic TCP replaces the previous HealthySteps Epic Implementation Playbook, providing ready-made templates, based on the guidance in the Playbook, that can be downloaded and used by sites with an Epic platform. The Turbocharger streamlines much of the work (~80%) required to implement the Playbook and optimize your EHR for HealthySteps workflows. If your site used the Playbook to customize your instance of Epic and you have not yet discussed next steps with the National Office or our technology partner, Nordic, please [contact us](#) to learn more.

HealthySteps Workflow

Many of our families do not have Smart Phones and/or MyChart for their child, how might they complete universal screenings prior to their visit?

Caregivers with active MyChart accounts can complete universal screens prior to a visit on a computer, laptop, tablet, or mobile phone device. Caregivers may also complete the same universal screens on tablets during the in-office registration process using Epic's Welcome application if they do not have a suitable personal device or MyChart account.

Are the HealthySteps SmartForms informed by other areas of the Epic patient chart?

SmartForm questions can be configured to display information documented in other parts of the patient chart and we have limited examples built into the workflow that were not highlighted in the webinar demonstration. You may wish to evaluate the risks and benefits of pulling more chart information into this workflow and decide to scope that into your implementation as additional custom work, but for the purposes of most sites, a majority of each SmartForms would need to be filled out at least one time for a Tier 2/3 patient to ensure accuracy for the HealthySteps Annual Site Reporting guidelines.

Are only HealthySteps Specialists completing the SmartForms?

The HealthySteps Specialist completes a mostly "structured" documentation workflow, consisting of pre-configure questions and responses that users select in alignment with HealthySteps education content, reporting guidelines and stakeholder input. Limited free-text responses and optional comments may be added by users in the HealthySteps documentation workflow, and it is permissible to include traditional, free-text narrative writing in the HealthySteps Specialist note that contains the structured documentation from the encounter.

The desire from the design of the workflow is that by having more discrete questions and responses automatically pulled into the HealthySteps note template, that HealthySteps Specialists will not need to write as much free-text information into their final note before signing.

Will other staff in the clinic have access to referral tracking and screening portions of the HealthySteps workflow?

Yes, specific users can be given different levels of access to the HealthySteps documentation workflow to aid in documenting or simply review information documented through a Snapshot report. Various aspects of the workflow can be configured to be shared with different user types at the health system and this would be an important customization item to indicate during the project scoping of your implementation with your desired IT team.

Does the HealthySteps workflow integrate with UniteUs or other SDOH/Referral platforms?

No, as a base workflow solution, this does not integrate with UniteUs or any third-party social needs platform or referral resource as vendor agreements are customer specific. You can evaluate and pursue integration as a custom solution in your project scope with your desired IT team.

Do responses to Epic's SDOH Wheel show up for patients in the HealthySteps Snapshot Report?

The HealthySteps Snapshot Report can be customized to include Epic's SDOH wheel responses from other users, but it is not currently configured to display. Please note, that responses from the HealthySteps SmartForms is not configured to populate the SDOH Wheel.

Can you see individual patient trends in universal screen responses in the HealthySteps Snapshot Report?

On a patient level, the HealthySteps Snapshot Report can be customized to display multiple universal screening responses from past visits in the same view, conveying a trend of responses to a particular series of questions by individual patients over time.

How does the workflow help with generating required annual data reporting?

Visual indicators within the HealthySteps SmartForms, such as a small blue vertical line and bolding of the question prompt, correspond to Annual Site Reporting measures that are impacted by a user response.

Epic HealthySteps Dashboard

Is the dashboard part of the HealthySteps Turbocharger Package?

Yes!

Can you see trends in dashboard?

Yes, certain metrics that are displayed with monthly columns can be toggled to display trendlines for the period specified.

Is dashboard setup to answer Annual Site Reporting questions?

Yes, we have placed visual indicators (a blue vertical line and bolding of the question prompt) within the HealthySteps SmartForms that indicate that an Annual Site Reporting measure is impacted by a user response to the question prompt. The measures in the HealthySteps Dashboard will include all Tier 1, 2 and 3 metrics as defined in the Annual Site Reporting guidelines, as well as some additional operational metrics to help sites improve real time performance of the HealthySteps care model.

National Office Resources & Support

What funding may be available to support the build?

Sites can look at the state and local level for funding for data systems. Please reach out to lfritz@zerotothree.org for more information about potential costs and sample SOWs.

What support does the National Office provide?

Our team at the National Office will be assessing sites for readiness and prioritizing work with Nordic to roll out the Turbocharger package. We are here to answer any questions and provide support throughout the process.

Should we continue using Welly if we adopt the Epic workflow?

We strongly encourage sites that currently use Welly but have access to Epic software to transition fully to the HealthySteps Epic workflow.

Other Considerations

Does the HealthySteps workflow use any Compass Rose functionality?

No, because Epic's Compass Rose module is not universally adopted across all Epic clients, Nordic built the HealthySteps workflow exclusively on the EpicCare Ambulatory suite of tools and functionality, so that every site on Epic can take advantage of the workflow. Some sites may opt to custom build Compass Rose functionality and workflows on top of this base workflow, but it would be important to evaluate the costs and benefits as there may be considerable workflow overlap and additional build necessary to connect to the Epic dashboard metrics for HealthySteps.

Our screenings are provided to families in a paper-based format, would screenings still be able to be provided on paper and uploaded to the patient chart?

Yes, paper-based completion of universal screens is still an option and can be scanned to the Media section of the patient's chart in Epic. For reporting purposes, we would recommend that a user is designated to transcribe limited responses from the paper-based screen into an Epic form in order to capture and track universal screening volume and number of concerns identified most accurately.

With respect to the CURES Act, what level of access do families have to this information?

This workflow does not specifically address patient access to chart information as they ability for a clinician to share or restrict information is a global system configuration setting that reflects their guidelines on information blocking in accordance with the 2021 CURES act. The same Epic tools that allow a user to share or restrict notes with a patient will function in this workflow as it is configured in your health system's Epic software. Typically, organizations have notes set to release by default and give clinicians the ability to toggle to not share the note manually within the notes activity. Please consult your health system's Epic team for more information on your current patient information sharing settings.

Is all the SmartForm documentation released to patients?

There is no standard functionality from Epic to conditionally reveal portions of a clinician's note based on which fields were document and only sharing certain parts of the note with a patient while keeping the whole note intact for clinical and billing purposes. Only documented responses from the SmartForms are pulled into the final note with the question prompt; if a question is not answered in the SmartForm, the prompt will not be pulled into the note. You may customize the HealthySteps SmartText template to remove potentially sensitive questions entirely from the note template, but that would impact what would be visible for the patient's care team that reviews HealthySteps Specialist notes in Epic.

Visit healthysteps.org to learn more, or contact healthysteps@zerotothree.org with any questions.