

EPIC INTEGRATION UPGRADES IN ONBASE

Integration for Epic includes the OnBase Viewer, Scan Acquisition Server (SAS), and the integrations for Front Office Scanning (FOS), Epic Release of Information (ROI), EpicCare Link / EpicWeb, Epic Image Retrieval API, OnBase Patient Window, and Epic Welcome. Join Cailen Myers, Senior OnBase Consultant for RPI Consultants, who will share our share best practices and recommendations for preparing to upgrade these integrations.

Friday, March 20, 2020

Presenters: Cailen Myers

+ **OnBase Forms Solutions**

- April 1st, 1:00pm CT

+ **OnBase for HR**

- April 15th, 1:00pm CT

+ **OnBase Case Studies & Success Stories**

- April 29th, 1:00pm CT

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Cailen Myers

Senior OnBase Consultant

- + 10+ years of experience designing, implementing and supporting OnBase
- + Specialized in Healthcare and EMR/ERP Integration
- + Certifications include: OnBase System Admin, OnBase Advance System Admin, OnBase Workflow Admin, OnBase Advance Workflow Admin, OnBase Support Engineer, EPIC Deficiency Tracking, EPIC Identity, EPIC Release of Information
- + Mom to 3 Siberian Huskies, loves baking and scrapbooking



- + **About OnBase Epic Integrations**
- + **Product Licensing & Versioning**
- + **Preparing for the upgrade**
- + **Summary & Questions**



Authorized Solution Provider

- + This Webinar is Not Produced or Endorsed by Hyland or Epic**
- + The Information in this Webinar is Current as of March 2020**
- + The Advice and Content Contained in this Webinar is Educational Only and Based Solely on the Experience of RPI Consultants**

ABOUT ONBASE EPIC INTEGRATIONS



OnBase provides a comprehensive product and module suite to integrate OnBase's Enterprise Content Services with Epic.

- + Store medical documentation upload through MyChart**
- + Content can be routed to workflow for review before document links the EMR**
- + Gives patients access to forms when using Clinical Consents module**
- + Can sign patient level forms**

Signature Deficiencies for Epic



- + Give the ability to electronically assign and complete deficiencies on documents stored in OnBase**
- + Analysts can view documents and assign deficiencies to physicians through the Epic HIM module**
- + Physicians can accept or decline the deficiencies from their Epic In Basket**
- + Signature deficiencies for EPIC automatically route through completion process**
- + Seamless integration**
- + Documents stored in OnBase are retrieved through Epic user interface**

- + OnBase document accessed through EPIC**
- + Rich ActiveX features**
- + Compare two documents side-by-side**
- + Submit OnBase documents for corrections**
- + Physicians stamp documents in their In Basket as acknowledged**

- + **Light scanning solution for paper & electronic files**
- + **Several import methods**
 - TWAIN, Kofax or ISIS compliant scanner
 - Sweep
 - Hyland Virtual Print Driver (VPD)

- + **Alternative scanning method to SAS**
- + **Integration allow users to scan into Front Office Scanning (FOS) client**
- + **Ability to mark up documents**
- + **Capture signatures**
- + **Indexed using information from Epic**

- + **Print OnBase documents with supported file formats**
- + **Integrates with Epic Release of Information module**

- + Allow users to view OnBase documents from EpicCare Link, PlanLink and EpicWeb**
- + Upload documents directly to OnBase**

- + OnBase documents displayed in locations where previously only Binary Large Object (BLOB) images were available**
- + In Hyperspace Chart Review, images can be viewed as previews or thumbnails**
- + Using the Image Selector, Images can be included in reports, notes & In Basket messages**
- + They can be imported into Epic's annotation tool**
- + ActiveX is not needed**

- + **Scan and upload documents directly into OnBase from Welcome kiosk**
- + **Document types and keywords are assigned using patient's registration information**

- + Medical Records retrieval tool to access OnBase records & documents**
- + Web-based interface**
- + Can be used outside of Epic**

- + Available on iOS and Android**
- + Uses OnBase Mobile Healthcare App**
- + Can view OnBase Documents**
- + Complete deficiencies**
- + Create forms**
- + Take pictures**
- + Upload into OnBase and attached to the patient's chart**

PRODUCT LICENSING AND VERSIONING

One of the most important parts of any upgrade is making sure the versions are compatible and that you have the correct licenses.

+ **Licensing**

- Valid Client
- Integration for Epic MyChart
- Web server

+ **16 SP2, 17, 18, EP1 & EP2**

- Epic 2014, Epic 2015, Epic 2017, Epic February 2018, Epic August 2018 & later

+ **15 SP3**

- Epic 2014, Epic 2015, Epic 2017

+ **14 SP2**

- Epic 2014, Epic 2015

+ **14**

- Epic 2014

+ **Licensing**

- Signature Deficiencies for Epic
- OnBase Client license to access client & config
- HL7 Listener

+ **16 SP2, 17, 18, EP1 & EP2**

- Epic 2014, Epic 2015, Epic 2017, Epic February 2018, Epic August 2018 & later

+ **15 SP3**

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+ **Licensing**

- Client (Concurrent, Named or Concurrent Client for EMR Integrations)
- Integration for Epic
- HL7 Listener
- Web server

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+ **14**

- Epic 2014

+ **Licensing**

- Client (Concurrent, Named or Concurrent Client for EMR Integrations)
- Integration for Epic
- HL7 Listener
- Web server
- Desktop Document Imaging for each scanning workstation

+ **16 SP2, 17, 18, EP1 & EP2**

- Epic 2014, Epic 2015, Epic 2017, Epic February 2018, Epic August 2018 & later

+ **15 SP3**

- Epic 2014, Epic 2015, Epic 2017

+ **14 SP2**

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- Epic 2014

+ **Licensing**

- Client (Concurrent, Named or Concurrent Client for EMR Integrations)
- Integration for Epic
- HL7 Listener
- Web server
- Front Office Scanning license for each scanning workstation

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+ **Licensing**

- Client (Concurrent, Named or Concurrent Client for EMR Integrations)
- Integration for Epic
- HL7 Listener
- Web server
- Workstation Client for Epic Welcome Kiosk license for each kiosk

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- Epic 2014

+ **Licensing**

- Basic HL7 Listener license
- Concurrent Client for EMR Integration license
- OnBase Patient Window license
- Workflow license (if using document corrections)

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- Epic 2014, Epic 2015, Epic 2017, Epic February 2018, Epic August 2018 & later

+ **15 SP3**

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+ **14 SP2**

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- Epic 2014

+ Licensing

- Basic HL7 Listener license
- Integration for Epic Canto (iOS) license or Integration for Epic Haiku (iOS) license or Integration for Epic Haiku (Android) license
- Signature Deficiencies for Epic license
- Unity Forms license
- Image Forms license
- Client (Concurrent, Named or Concurrent Client for EMR Integrations)
- Integration for Epic
- Web server

PREPARING FOR THE UPGRADE

Best practices for preparing for your upgrade

+ Create a testing script

▪ *Admins & Superusers*

- Test OPW (viewing and linking)
- Test encounter level document (viewing and linking)
- Test patient level documents (viewing and linking)
- Test order level document (viewing and linking)
- Test Haiku/ Canto integration
- Test SAS
- Test FOS
- Test ROI
- Test Welcome

*Always test in your test system!

+ **Confirm your test system is currently working**

- Does OnBase test work?
- Does EPIC test system (rel, tst, sup, etc) work?
- Are the interfaces running and pointed to correct system?
- Are services and app pools running?
- Can you open OnBase document in EPIC?
- Can you link documents?
- Do the OnBase EPIC integrated modules work?

***Always test in your test system!**

+ **Review your test servers and versions**

- OnBase Version
- EPIC Version
- Microsoft .NET Framework
- C++ Requirements
- Web Browser
- 64-bit vs 32-bit OnBase Application Server

***Always test in your test system!**

+ **Know your team**

- Epic analyst
- Server engineers
- DBA
- Superusers

***Always test in your test system!**

+ **Have a plan**

- When
- Where
- Who
- What

***Always test in your test system!**

+ **Prepare your test system**

- Move files to the servers
- Move installers to the servers
- Have backups of .config files
- Freeze any build changes
- Lock users out of the system

***Always test in your test system!**

+ Upgrade your test system

- Install files
- Document what you install and on which servers
 - When upgrading both OnBase and Epic, perform the OnBase upgrade before you upgrade your Epic system.
 - When upgrading to a new build of OnBase, also upgrade all OnBase Application Servers used by the Epic integration. Upgrading to a new build will not require changes to the OnBase database or other aspects of the OnBase environment.
 - When upgrading OnBase, use the latest build available for the new OnBase version.

***Always test in your test system!**

+ **Test your new test system**

- Use your script
- Test everything
- Note patients used, encounters used, orders used, etc
- Note issues with as much detail as possible
- Note who resolved issue
- Note how issue was resolved

***Always test in your test system!**

+ **Have superusers test new test system**

- Use the testing script
- Have analyst there to support and help
- Signoff

***Always test in your test system!**

+ **Review your production servers and versions**

- OnBase Version
- EPIC Version
- Microsoft .NET Framework
- C++ Requirements
- Web Browser
- 64-bit vs 32-bit OnBase Application Server

***Always test in your test system!**

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***Always test in your test system!**

+ **Have a plan**

- When
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+ **Prepare your production system**

- Move files to the servers
- Move installers to the servers
- Have backups of .config files
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***Always test in your test system!**

+ **Upgrade PRODUCTION system**

- Use install documentation from step 7

***Always test in your test system!**

+ **Test your new production system**

- Use your script
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- Note patients used, encounters used, orders used, etc
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SUMMARY & QUESTIONS

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Thank you for attending #WebinarWednesday with RPI Consultants and our 2020 OnBase Webinar Series. Find this webinar recording and all previously recorded webinars online at www.rpic.com/webinars.

- + **About OnBase Epic Integrations**
- + **Product Licensing & Versioning**
- + **Preparing for the upgrade**
- + **Summary & Questions**
 - Please address any Epic specific questions with your Epic Technical Resource



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- + Identify Enhancement Opportunities for Current Solutions**
 - Intelligent Data Capture enabled automation
 - Automated decisions and tasks to reduce errors and delays
- + Identify Opportunities for new Solutions & Departments**
 - Automated ancillary workflows and processes related to current solution
 - Completely new departments and workflows
- + License and Module Inventory**
 - Understand what you're using and what you're not
 - What can you be doing with what you have already

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