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	Technical Implementation	Epic Integration	Training	Strategic Partnership
• Introductions	• Technical requirements	• Integration strategy	• Author training	• Ongoing enablement
• Strategic goals	• Implementation recommendations	• Change control requirements	• Functional Administrator training	• Product support
• Project plan	• Configure user management and authentication methods	• Validation testing	• Ongoing periodic training	• Program reviews
• Professional services scoping				• 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 initial rollout, providing visibility and peace of mind to all stakeholders involved. Our team of experts works with your curriculum designers to develop a thorough content strategy, including the use of existing content and the development of new courses, lessons, documents, and videos. Planning with you and using our experience with other clients, our Professional Services experts will assist you in determining the most effective project plan that meets your goals and end-user needs.

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 this 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 Smart on FHIR 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 group-based filtering. We work closely with your IT team and Epic 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.

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 & Enablement

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.

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.

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.

Required Resources

Workstream	Client Resources Required
Project Strategy	• Program owner • uPerform champion • Project manager • uPerform functional administrators • IT administrators • uPerform authors • Curriculum designers • Epic analysts • Epic reporting/Clarity team • Epic technical services • Epic Interconnect administrator
Technical Implementation	• uPerform champion • Project manager • uPerform functional administrators • Curriculum designers • uPerform authors • IT administrators
User Management & Authentication	• uPerform champion • Project manager • uPerform functional administrators • Curriculum designers • uPerform authors • IT administrators • Epic analysts • Epic reporting/Clarity team • Epic Interconnect administrator • Epic technical services
Epic Integration Plan	• uPerform champion • Project manager • uPerform functional administrators • uPerform authors

After the initial uPerform for Epic implementation has been rolled out successfully, our team remains in touch with you by organizing regular checkpoint discussions. We evaluate your uPerform configuration periodically by reviewing analytics to provide recommendations to help improve the expansion and adoption of uPerform across your organization while identifying options to evolve and expand your program over time.

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