Case Study

A Transformative Training Experience through Adaptive and Role-Based EHR Education 2024

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A Transformative Training Experience through Adaptive and Role-Based EHR Education

Aspirus Health & uPerform

Cost to Implement

0 - No Cost
$ - Onetime Cost
$$ - Budgeted Cost
$$$ - Board-Approved Cost

Implementation Timeline

0–6 Months
6–12 Months
12–24 Months
2+ Years

Program Goals

- Create a large-scale EHR education program with limited time and staff

Organizational Outcomes

- 72nd percentile for provider satisfaction with virtual training
- Two-point higher average Net EHR Experience Score (NEES) for uPerform users compared to nonusers

Collaborative-Verified Best Practices

- Creating EHR Mastery: Onboarding EHR Education
- Creating EHR Mastery: Ongoing EHR Education

Keys to Success

- Create a strategic partnership with uPerform to introduce learning on demand and computer-based training
- Create role-specific tip sheets and simulations to reduce the need for live training sessions while enhancing the accessibility of training materials
- Task curriculum review boards to revise and tailor training materials to be role specific and incorporate the "why" behind actions in the EHR
- Implement a Learning Pathways site, created by uPerform, that was featured as a link on the Epic F1 dashboard, ensuring quick navigation, flexible timing, and ease of access for learning during upgrades
- Look for opportunities for continuous EHR education improvement based on lessons learned from feedback and experience from prior upgrades

What Aspirus Health and uPerform Did

The Aspirus Health Technology Educators (TEDS) team recognized the need for scalable education due to challenges, such as limited resources and network constraints, that were exacerbated by the organization's rapid expansion and the onset of COVID-19. Partnering with uPerform paved the path forward to create and support a virtual education model. uPerform's platform enabled Aspirus TEDS to create 575 tip sheets and simulations and improve access to and the breadth of training materials. A tight training timeline during the implementation of Beaker and Bugsy was alleviated by the creation of 11 workflow-specific training modules using uPerform, reducing the need for live training sessions for thousands of staff members. Survey analysis revealed increased preparedness from clinicians who engaged with the uPerform Learning Library. To enhance ongoing training, Aspirus focused on role-based training with an emphasis on the "why" behind actions in the EHR workflow. This led to improved user satisfaction. Additionally, challenges in communicating upgrade information across units and locations were addressed with the development of a Learning Pathways site that was featured as a link

on the Epic F1 dashboard, resulting in a 3x increase in user engagement and effectiveness during upgrades. The organization's training model is dynamic and adaptable, highlighting their commitment to individual impact and continuous training improvement.

How Aspirus Health and uPerform Did It

The Need for Virtual Education

In 2019, Aspirus Health relied on a centralized training hub in Wausau that hindered onboarding and communication across 10 hospitals and 54 clinics, especially for remote locations that were difficult to access regularly. Substantial amounts of time were wasted because of the need to travel or to wait for a scheduled class time. The onset of COVID-19 prompted the organization to rapidly shift to computer-based training, which created a different set of challenges for various roles. The organization also announced the implementation of Epic in seven newly acquired hospitals and 21 clinics, which further intensified the situation.
TEDS, the team responsible for training end users, supporting Epic applications, and developing training materials for all of Aspirus' locations, consists of 15 members. The constraints of a limited training team paired with new sites that were not yet connected to the Aspirus network warranted innovative solutions, and the cost of a new tool was offset by the reduction in FTEs needed to support training.

Implementing uPerform

Aspirus used [Nordic](#) to help with the virtual instructor-led training needed for the simultaneous Epic go-live at 7 hospitals and 21 clinics. The organization also partnered with uPerform to create a library of learning content to support clinicians after the big bang. During the first implementation phase, existing content was imported into the cloud-based uPerform Learning Library. This gave clinicians quick access to learning through Epic's user menu. Over the six months post-go-live, 575 tip sheets and simulations were created using uPerform, enhancing the breadth of training materials. The application enabled the TEDS team to record screens and generate job aids, procedure guides, tip sheets, and workflow simulations. These simulations proved valuable for teaching new users efficiency tips and workflows. Survey results revealed that those who engaged with the Learning Library felt more prepared compared to those who did not.

Improving Ongoing Training

Aspirus Health also experienced challenges with ongoing training and clinician dissatisfaction with the effectiveness of classroom training. In response, Aspirus Health implemented curriculum review boards, tasked with creating and implementing role-based training and incorporating the "why" behind specific actions in the EHR workflow. Users, trainers, and organization leadership attribute the success of the training model to its focus on workflows, not just emphasizing functions and features but also elucidating the reasons behind specific actions. Training courses follow an instructional format, transitioning seamlessly into demonstrations and simulated training sessions, enabling users to observe, practice, and navigate through workflows in a controlled environment. This approach had a positive impact on user satisfaction and confidence, particularly in critical roles like nursing. One end user said, *"It was convenient to learn at my own pace and have the chance to go back and watch something if I didn't understand it the first time."*

The organization faced additional challenges in effectively communicating upgrade information to end users, given issues like email neglect and reluctance to use the LMS. To address these issues, Aspirus collaborated with uPerform to develop a Learning Pathways site that was featured as a link on the Epic F1 dashboard for easy access by clinicians. Learning Pathways serves as a centralized hub for upgrade-related information. Role-specific buttons simplify navigation, catering to the diverse responsibilities of hospital nurses, for example. Users can access training materials, workflow demonstrations, and tip sheets, ensuring flexibility in learning. The site also links to external resources, such as an IT help portal. Additionally, uPerform's Epic in-application help integration ensures the seamless incorporation of training into Epic workflows, reducing the need for users to leave the Epic system when they need help. The success of this approach is evident in the 3x increase in user engagement, as revealed in consumption spikes during upgrades, highlighting the effectiveness of the Learning Pathways strategy over previous methods. Lessons learned from past upgrades inform ongoing improvements for future implementations, showcasing a dynamic and adaptive training model.

While preparing for the implementation of Beaker and Bugsy, the training team had a tight time frame to develop content. Despite the challenges, they created 11 workflow-specific training modules, reducing the need for live training sessions for 5,500 staff members. Despite the large scale of Aspirus' training program, they keep in mind the impact training has on individual clinicians. Every statistic represents a real person whose life is affected by training initiatives, and the organization's work to improve their training program has had a positive impact on individuals and the organization as a whole.