

Physician Builder Playbook (7.11.24)

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Becoming a Physician Builder

Approval process

Becoming a physician builder is a considerable investment of both time and money, and requires an ongoing commitment to improving eStar for your fellow clinicians. Our current policy requires that your department chair or other appropriate organization leader provide written confirmation that you will have non-clinical time devoted to this role, at a level of 0.1-0.2 FTE. Additionally, you must receive approval to register for training, and need to complete your certification before system access will be granted.

Please contact Jonathan Wanderer (jon.wanderer@vumc.org) and Laura Zahn (laura.a.zahn@vumc.org) if you are interested in becoming a physician builder.

Physician builder agreement

It is critical to the program that physician builders understand their role and relationship with other members of the eStar team. In addition to following guidelines with respect to building objects, conducting appropriate testing and strategies for change management, physician builders should understand that build access is a privilege that can be revoked. The physician builder agreement is a written acknowledgement of our policies and should be downloaded from the VUMC Physician Builder Sharepoint site, reviewed, printed and signed.

Registration

You must have approval before beginning the registration process. To begin the process to obtain approval, please email Jonathan Wanderer and Laura Zahn your signed physician builder agreement and written confirmation for your non-clinical time.

After obtaining approval, you can submit your registration request through UserWeb. Completing registration requires obtaining a UserWeb account. Anyone with a VUMC email address is able to obtain an account. The UserWeb is linked from the Physician Builder Sharepoint site, and is also available here:

<https://userweb.epic.com/>

After completing UserWeb registration, navigate to the Training Home: <https://training.epic.com/>

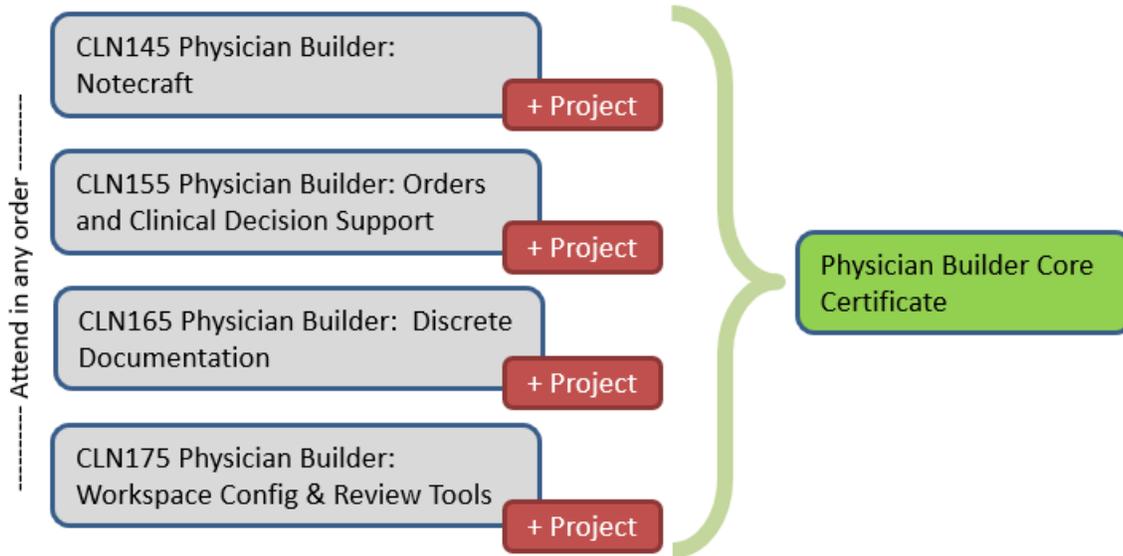
From the Training Home, select 'Course Catalog' and search for 'Physician Builder' to review the required courses. There are three general tracks: Physician Builder: Core, Physician Builder: Analytics and Physician Builder: Population Health. All three result in a physician builder certification, and you may choose whichever course best meets your intended build area. Courses can be taken in any order.

The image below is taken directly from Epic's documentation and illustrates the Physician Builder pathway for the Physician Builder: Core certification. Though it makes it appear as though the Notecraft course satisfies the "builder certification," that course is just the first step in the process. In order to achieve Builder access (and full accreditation or certification via Epic), you must complete the entire pathway for one of the three tracks mentioned in the previous paragraph.

The simplest certificate to achieve is Physician Builder: Notecraft:



The next most common certificate, for those interested in more robust training across a wider variety of topics, will be Physician Builder Core:



Review the dates for upcoming training sessions. Click on the date of interest, which will add the course to your cart. Click on the cart, then select 'I'm registering myself.' Click submit request, and repeat the registration process for each required course.

If you are not an independent provider (physician, nurse practitioner, physician assistant, or nurse anesthetist), you will want to register for the Clinical Content Builder courses, which include Clinical Builder: Notecraft (CLN105), Clinical Content Builder: Orders and Clinical Decision Support (CLN115) and Clinical Content Builder: Discrete Documentation (CLN125), Clinical Content Builder: Workspace Configuration and Review Tools (CLN135).

Training costs

Epic provides on site Physician Builder training classes free of charge, including breakfast, lunch, snacks and an endless supply of coffee and tea.

For non-physicians, the equivalent Clinical Content Builder training classes are provided by Epic at approximately \$400 per training day.

For travel costs, there is no reimbursement from HealthIT available. You will need to fund your travel through your departmental funds.

Virtual training

As a result of the COVID pandemic, Epic has converted courses including the Clinical Content Builder and Physician Builder to a virtual format. The same cost structures apply, but without any travel costs as there is no travel. The requirement to travel to Epic to complete the certification has been waived, i.e., appropriate completion of the virtual training and associated projects will count as a full certification would.

Travel logistics for non-virtual training

There are many hotel options to choose from. Review 'Hotel Accommodations' in the Training Home for an update list of hotels that partner with Epic.

Travel to/from airport and hotel: Taxi, Uber, and Lyft are all options. Some hotels also offer airport shuttles.

Travel from hotel to Epic: Each hotel that partners with Epic offers shuttles to and from Epic. You will need to register with your hotel for the shuttle and some hotels charge a nominal fee for the shuttle.

Travel from Epic to airport: Many hotels offer shuttles directly from Epic to the airport.

Getting certified

Certification as a physician builder requires attending all of the required courses and completing the required projects with appropriate scores.

If you start work on the project using your time in the evening after class, you will likely be able to complete the physician builder projects while you are in Wisconsin. If not, you can use Epic's Access (linked from Physician Builder Sharepoint site) to continue work on the project once home.

Certification as a clinical content builder requires completing parallel work as above. At VUMC, "Physician Builders" include both clinical content builders and physician builders.

Maintaining certification

In order to maintain your certification, you must complete Continuing Epic Education as specified by Epic. This includes applicable New Version Training on an annual basis.

In order to take a recertification or maintenance of certification exam, you can go to the Epic User Web (<https://userweb.com>) and request an exam. It will bring you to a screen that will ask you to choose a proctor or Online Proctoring Services. You would choose Online Proctoring Services and follow the directions.

id testing date. Once completed, the exam or project can be used to complete a new track until the

ed on, review the [change log](#).

ys in advance.

Working on a Project? Need an environment? Request one [here](#).

Score Expires After	Projects:	Available On	Last Day to Start	Last Day to Submit	Score Expires After
Nov 15, 2024	May 2023	-	-	-	Nov 15, 2024
Apr 15, 2025	August 2023	-	-	-	Apr 15, 2025
Oct 17, 2025	February 2024	May 13, 2024	Oct 18, 2024	Nov 22, 2024	Oct 17, 2025

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2 months ago

Training Resources

- Training Coordination
 - Course Catalog / Train Tracks
 - Community Members Training Guide
 - Consultant Training Guide
 - Consultant Certificate Profiles
 - Exam Proctors
 - Planned Downtimes
- Certificate Resources
 - Class Registration Form
 - Cert Environment Request
 - Check Your Setup
 - Cert Env Access & Foundation Hosted
 - Europe Cert Env Access & Foundation Hosted
 - Exam Request Form**

Getting Build Access

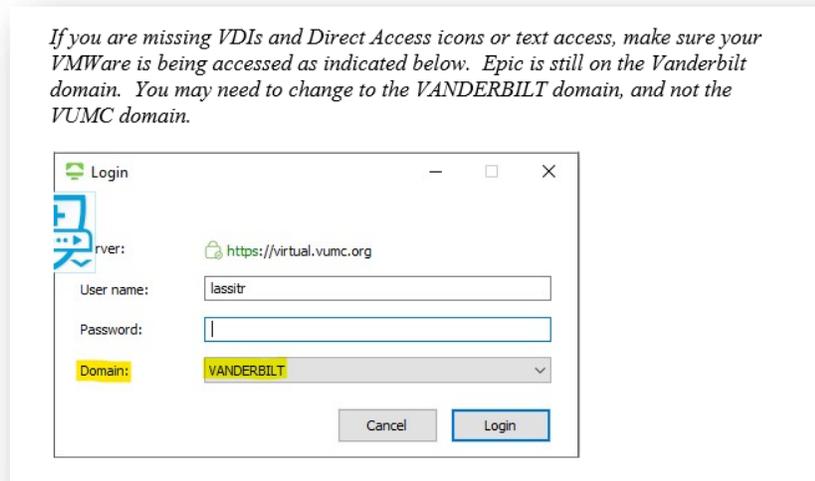
Requesting an analyst partner and system access

Email Jonathan Wanderer and Elise Russo to start the process of becoming paired with an analyst partner and obtaining system access. Here is the full list of requirements necessary to complete before obtaining access:

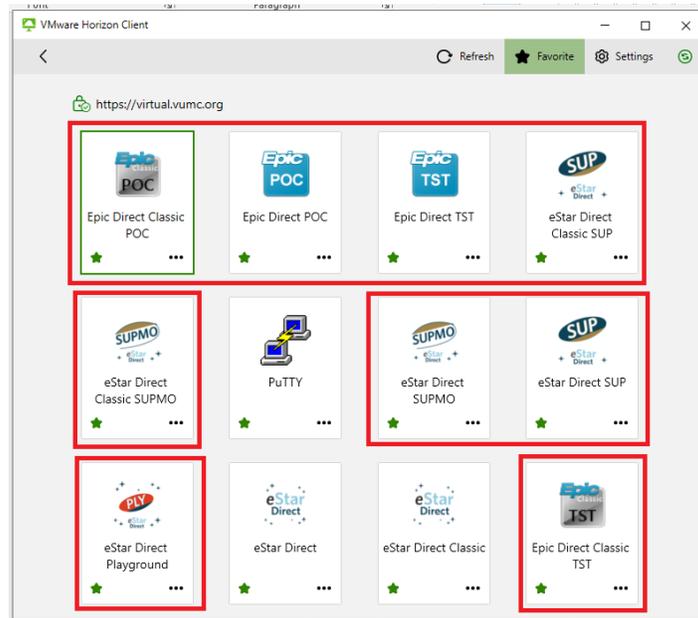
- Written confirmation of non-clinical time from your departmental chair or other appropriate organizational leader
- Submission of signed physician builder agreement (available on Sharepoint site)
- Confirmation of Epic certification
- Approval for participation (Jonathan Wanderer will request once above three documents are submitted)

Configure VMware and Verify Access

Add “virtual.vumc.org” as a server to your VMware client if it is not already configured. Ensure that your login domain is Vanderbilt:

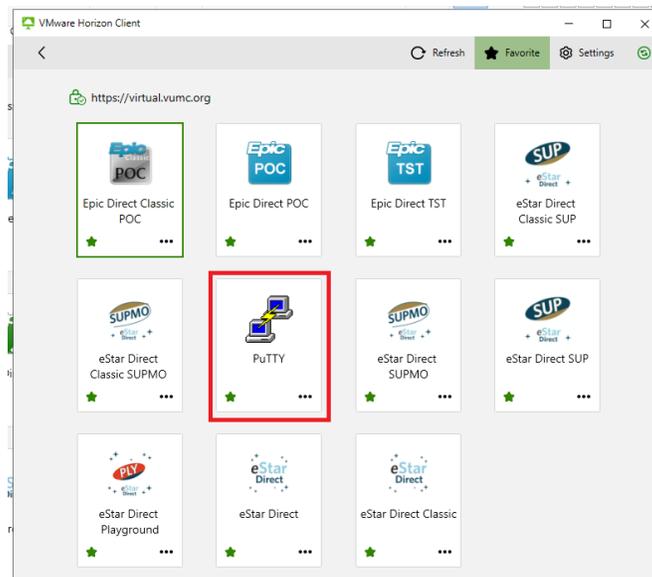


Once your access is established, you should have access to additional environments as below:

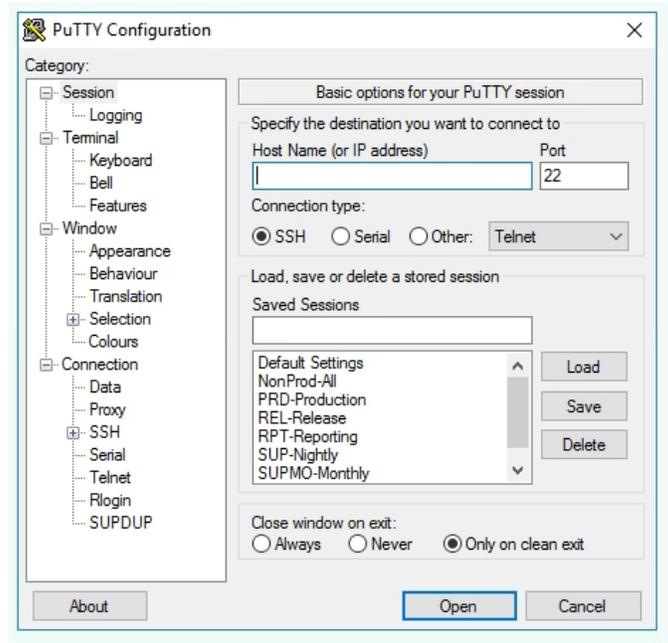


For builder activities, use the “Direct Classic” versions of these environments as the “Direct” version will not have builder tools until Epic’s September 2025 version.

If you are a Tier 2 builder, you have access to Text. To verify this, look for the PuTTY icon once connected to VMware:

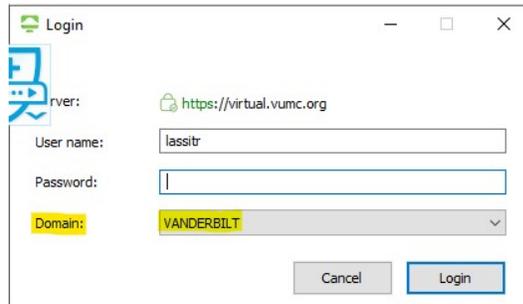


This will give you access to both non-PRD and SUP/SUPMO text environments:



A further note on text access:

If you are missing VDIs and Direct Access icons or text access, make sure your VMWare is being accessed as indicated below. Epic is still on the Vanderbilt domain. You may need to change to the VANDERBILT domain, and not the VUMC domain.



Getting Started with Building

Understand the conventions

There are over 800 master files that are used in eStar, and many master files are shared by multiple applications. In order to make objects easy to identify, naming and numbering conventions are used so that all builders in the system understand which objects belong to which applications.

Naming and numbering conventions are outlined in the “Epic Style Guide Master File Naming and Numbering Conventions.” You should review this document prior to any build.

In brief, in eStar, most master file objects are prefaced with ‘VUMC’ followed by the application abbreviation, i.e., ‘AN’ for anesthesia. New objects for an anesthesia builder would thus begin with ‘VUMC AN’ followed by an effective description of what that object does.

Objects are numbered with a 10 digit convention, where the first three digits denote the application (anesthesia = 112), the middle 5 digits denote the Foundation System / Epic-released object that is being copied (89455), and the last 2 digits represent the copy number starting at 00. So, for instance, LPP 1128945508 would be the 8th copy of Epic-released programming point 89455 created for the anesthesia application.

Understand the environments

You have three distinct environments available to build in:

- POC (proof of concept): This environment contains all build that has been migrated to PRD. There is no real patient data in this environment, only test patient data that has been entered. This environment is ideal for doing build that will be migrated to PRD.
- SUP (support): This environment is a copy of PRD that is made every night at approximately 3am and is available at approximately 5am. This environment is ideal for doing initial build that requires patient data which would be challenging to create from scratch in POC. Objects created in SUP are destroyed each day, but can be re-created in POC using screenshots. This environment is also ideal for troubleshooting existing build using specific scenarios reported in Pegasus tickets.
- SUPMO (monthly support): This environment is a copy of PRD that is made the first day of each month at approximately 3am and is available at approximately 5am. This environment is ideal for doing larger projects that require extended build or testing time. Objects created in SUPMO are destroyed each month.

There are other environments that are available to you:

- TST (test): This environment contains objects on their way to PRD and is used to test your build. You will be requesting that your analyst buddy migrates objects from POC to TST. You should use Epic’s

model users / foundation system users for testing (i.e, IPMD—see Sharepoint Build Resource directory, file 'Epic-Foundation-System.xls' file for a list).

- PRD (production): This is the production environment.

Testing as different users

Commonly, building and testing workflows requires actions as multiple different types of users. You can use model users for this part of the process. A list of available model users is posted on the Physician Builder Sharepoint site (Epic-Foundation-Users.xls). All model users share the same generic password.

When troubleshooting issues in SUP, it is very handy to use an LDAP override to temporarily login as another user. A tip sheet on how to perform an LDAP override is available on the Physician Builder Sharepoint site (Logging in as a user in SUP).

Scoping your project

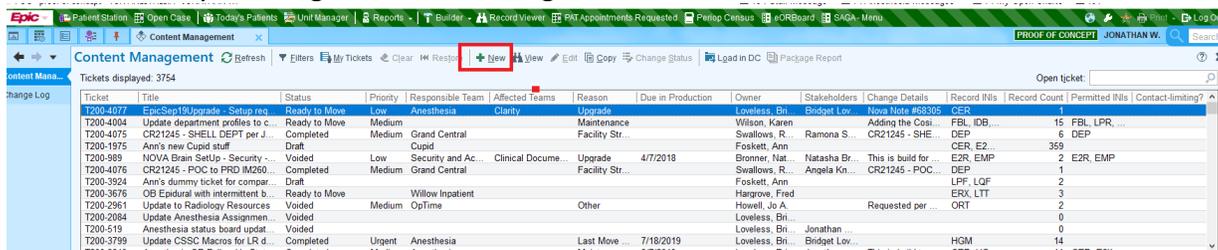
Project planning

As part of becoming a physician builder and obtaining access to the system, you likely have already identified the specific area in which you are planning to work. This project should be fully scoped before any build work is begun, meaning that you have a clear idea of what it is that you are trying to build, how you are going to do it and what success in doing so would look like.

Governance

When developing your project plan, consult with the appropriate application team with your project proposal before you get started. This will make sure that the build that you are working on fits with the team's overall build strategy, and is not redundant or in conflict with other work already underway.

For smaller projects that are classified as exempt build (see VUMC Physician Builder Policy for details), you will need to start by creating a Content Management ticket:



- Click 'New' within content management activity
- Enter ticket title, and enter ChangeReq number into 'Reference #' field"

- Enter 'Physician Builder Project' as the reason

For larger projects, please use the enterprise enhancement request process and indicate that you will be performing the build yourself. These tickets can be entered using the following link:

- <https://pegasus.vumc.org/request/discover/info/?id=764>
- Once approval has been obtained, follow the content management ticket generation process as above

For projects related to research, contact Marc Beller and Zorah Taplin (HealthIT Research Portfolio, Product Managers) in advance of starting any build.

- Separate governance processes are required.

For build related to BestPractice Advisories (BPAs), flowsheets (FLO) when related to BPAs, Orders, Order Sets (PRL), SmartSets (PRL), please create a Pegasus Ticket (link below) for assistance with identifying the appropriate HealthIT analysts to work with.

- <https://pegasus.vumc.org/request/discover/info/?id=3843&type=0&from=%2frequest%2fdiscover%2fr esults%2f%3ft%3denterprise%26s%3d&s=>
- Once approval has been obtained, follow the content management ticket generation process as above

For build related to research in any way, please contact Marc Beller and Zorah Taplin in advance of starting any build.

User education

As a physician builder, you are poised to understand not only how the build should work, but also how it should fit into clinical workflow and what processes will be changed by adopting the change. Part of your responsibility is to ensure that appropriate user education is developed. You will work with your team's trainer on developing the appropriate tip sheets, quick start guides and change announcements to coordinate education with changes to the system.

For an example of how the tip sheets are structured, see 'Example Tip Sheet for Peds Complex Coord of Care' on the Physician Builder Sharepoint. For an example of how quick start guides are formatted, look no further than this Word document!

Tracking Your Build

Use Content Management to Track Build

One of the best ways to manage your work is to create a content management ticket as described above.

Item tracking is used for moving pieces of objects where moving entire objects might bring along other, unintended changes. This is used for objects such as profiles and EMR definitions. To find the item number, use CTRL-click in Hyperspace or HOME-F8 in text.

Build migration

Get in touch with your analyst buddy to let him/her know that you have build for migration along with a description of the change. Records are migrated from POC to TST, and after that migration to TST, you will re-test your change to make sure that it performs as expected.

Once your TST review is complete, let your analyst buddy know that your records are ready to being the process to move to production. Your analyst buddy will create a Change Request (CR) that describes the impact of the change. This will be presented at Change Advisory Board (CAB), which meets Tuesdays and Thursdays. After approval by CAB, your analyst will be able to migrate the build to production.

Tracking the build migration process

As build is moved to production, the process can be tracked in a number of ways.

- Updates to content management tickets: As tickets are moved, their status will be updated.
- Updates to objects: In addition to the change control processes described above, you can compare objects between environments to get a direct view of migration on a per-object basis. From the chart search box, enter "Record Compare" to load the appropriate tool.

Getting help

Resources for physician builders

While the Epic courses are good starting points, there are many questions that will come up during your build and many roadblocks that you will encounter. Here are some resources to consider before you get started with your build and if you run into problems:

- Galaxy: This contains all of the official Epic-provided documentation for the system and is a great place to start.
- UserWeb Forums: These forums contain user questions, answers and discussion, and can be very helpful for both troubleshooting specific issues as well as understanding pros and cons of different build approaches.
- Nova: This section of Epic's web provides release notes for software releases. At times, there is information in Nova that is not listed elsewhere.
- Community Library: Typically, what you are trying to do has already been done elsewhere. Consider reviewing the community library before starting a project to get ideas on how to approach your project.
- Your analyst buddy: If you can't figure out an issue yourself, ask for help!
- Your application's technical service (TS) contact, application manager (AM) or application coordinator (AC): If your local analyst team is not able to help, consider reaching out to your Epic contacts yourself
- Sherlock: This support log system is meant to troubleshoot issues with Epic and provides a way of tracking issues and resolution.