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**TIMELINE**

**December 2024**

- Consultants from Surgical Directions were hired to improve efficiency.
- New anesthesia guidelines were applied to urology case navigation.

**January 9, 2025**

- EPIC Celebration was held for all Saratoga Hospital employees at Vapors Nightclub.

**January 21, 2025**

- Surgical Directions developed scheduled appointments for phone interview screenings.

**February 18, 2025**

- IT specialist issued a *red flag*: A low/medium/high risk stratification tool was *not* built into the EMR.
- A paper risk stratification grid was re-instituted temporarily, replacing the missing computerized EPIC taskbar feature.

**March 2025**

- PAT achieved 100% navigation of all scheduled cases.
- Implemented secure messaging templates to Advanced Nurse Practitioners (ANPs).
- Chart room plan updated: Two RNs worked three days ahead for pre-op navigation.

**April 2025**

- EPIC Resolution Committee formed as a task force to resolve EPIC-related problems, including taskbar issues.
- Communication improvements were introduced: Gemba board, weekly huddles, space redistribution (reduced clinic rooms from four to two), and 10 new headsets.
- Town Hall meeting took place with physician practices for onboarding.

**May 28-30, 2025**

- Magnet Surveyors' site visit.

**June 1, 2025**

- Electronic Appointment Go-Live: RNs entered real-time appointments with navigation, reducing patient calls.
- Daily safety huddles were established to identify and resolve ongoing deficiencies in order entry, isolation mismatches, benchmarking edits, and scripting of anesthesia questions.

**Summer 2025 – "Reaching the Emerald City" (Goal Achievement)**

We aim to keep improving our unified, streamlined pre-testing process through ongoing teamwork, focusing on boosting efficiency and delivering better patient outcomes. The Yellow Brick Road continues to guide our path forward.

Ongoing efforts to enhance the EHR system are currently focused on integrating risk stratification tools and anesthesia guidelines.

**July 2025:**

The Saratoga Hospital proudly received its Fifth Magnet Designation from the American Nurses Credentialing Center!

**Conclusion – "There's No Place Like Home"**

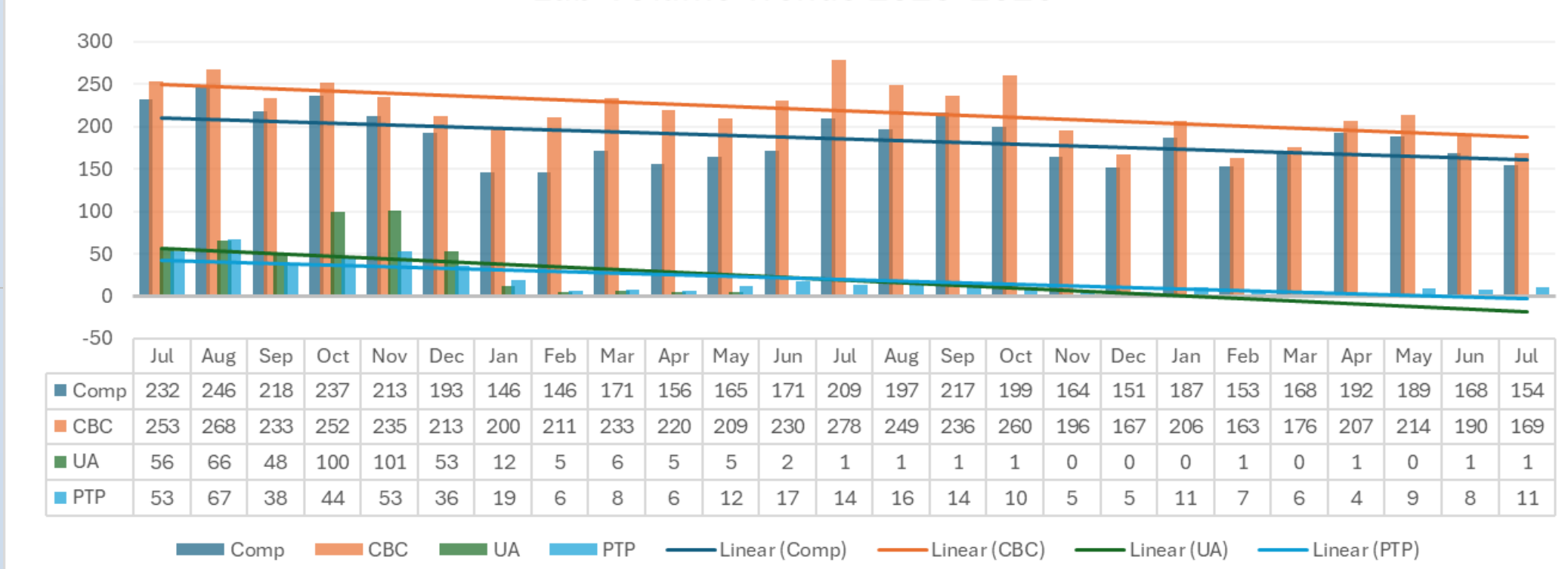
The Long and Winding Road Continues...

Much like Dorothy's journey down the Yellow Brick Road, our EPIC Odyssey is a purposeful quest toward the "Emerald City" — symbolizing excellence in pre-procedure patient optimization and the pursuit of flawless patient outcomes. Along the way, we face challenges, seek guidance, and adapt, all striving to reach that ultimate destination of care perfection.

**Outcomes**

- ❖ The risk stratification tool and EPIC algorithm reduced diagnostic volumes in lab testing for # of CBC, COMP, T&S, PT/PTT, and eliminated urinalysis tests and CXRs.
- ❖ Employee survey identified many EPIC benefits: Upgrade to a faster system, extension of the web resource for national health history accessibility, reduction of faxes and phone calls, elimination of paper charts, and increased productivity.
- ❖ Improved direct inter-dept. and intra-dept. communication with physician's offices.
- ❖ Template design for PAT sole ownership for patient prep in a Surgical Home setting led to fewer duplicate or unnecessary tests, avoided insurance denials, and increased patient satisfaction.

Lab Volume Trends 2023-2025



**References**

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**Fall 2024 – "Meeting the Lion" (Courage: Tackling System Changes)**  
**WARNING: NO CLASS → NO ACCESS → NO KIDDING!**



**Sept – EPIC Wave 2: EPIC PAT RN Class**

- 9/5 — An Orthopedic Nurse Navigator was hired.

**October**

- 10/02 — PAT resource nurse shadowed AMC staff on EPIC charting.
- 10/19–10/20 — Conversion Weekend: Volunteers dedicated the weekend to transitioning from MEDITECH to EPIC.

**"SURF'S UP" Campaign**

- Daily countdown emails to all employees with training resources and reminders about system changes, including the Legacy system, Care Everywhere, and MyChart.

**November**

- 11/2 — "SURF'S UP - WE'RE LIVE!" EPIC charting went live in PAT clinics – fully electronic, no paper charts, worksheets incorporated.
- 11/16 — EPIC "Elbow Support" team was on-site for two weeks to troubleshoot and train staff.



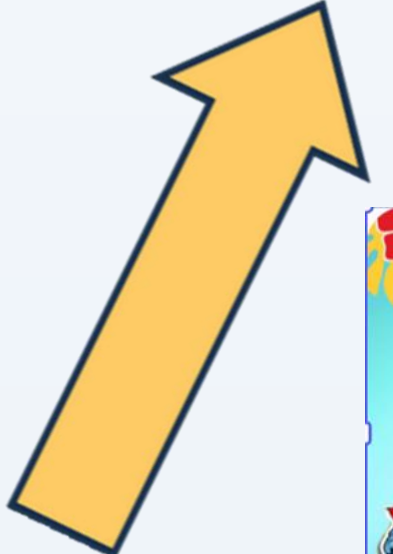
**Summer 2024**

**July:** Strengthened confidence among staff through targeted training and improved support tools.

- EPIC Wave 1 training classes began: One Day Away

**August**

- EPIC training launched via HealthStream e-learning with a 6-module curriculum
- 8/24: Virtual EPIC Town Hall on Care One EMR project via TEAMS to shadow AMC
- 8/27: Care One Connect session focusing on EPIC superusers and EPIC playground practice resources



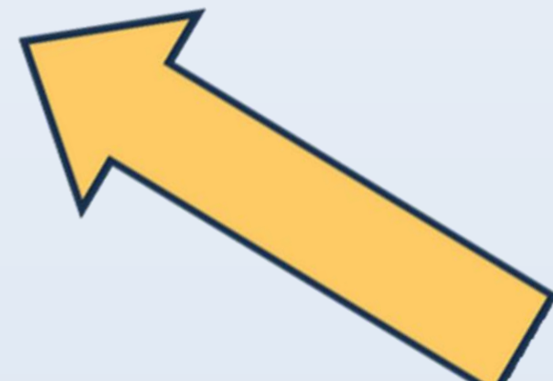
**Winter/Spring 2024 – "Meeting the Tin Man" (Heart: Compassion in Patient Care)**

Conducted huddles with Leadership, Physicians, Chief Anesthesiologist, RNs, and PARs to align on updates.

- Initiated collaborative efforts to adapt and improve Anesthesia Guidelines for pre-emptive EPIC readiness, continuing through Spring 2024.
- Implemented a hybrid PAT structure in the Surgical Home Clinic, shifting from two Nurse Navigators to Epic-based telephone interviews incorporating the risk stratification algorithm for pre-testing and medical optimization decisions.
- Additional PAT RNs were trained and precepted into the Nurse Navigator role.

**April 14, 2024 – 2<sup>nd</sup> Annual Nursing Day of Inquiry**

- Presented Surgical Home Poster: "Pre-op Surgical Workflow Preparation for EPIC – Magnet Evidence #10" Focus: Impact of a Standardized Surgical Risk Stratification Tool on Pre-Operative Diagnostic Testing



**2023 – "Meeting the Scarecrow" (Brainpower: New Ideas, Planning)**

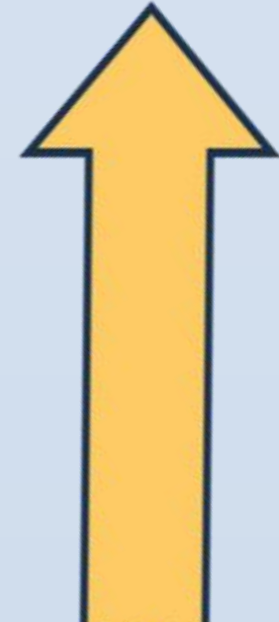
A collaborative team—Chief Anesthesiologist, Surgical Services Nurse Management, and PAT Nurse Resource RN—launched the EPIC Risk Stratification Protocol (minimal / moderate / high risk), and piloted it with one orthopedic surgeon's total joint patients.

**Dec 18:** Expanded to all minimal- and moderate-risk procedures.

**Dec 20:** Refined classification tools for clearer procedure stratification.

**Training:** Chief Anesthesiologist delivered staff education; Patient Access Representatives (PAR) trained on updated workflows and visual aids.

**Innovation:** Established a Nurse Navigator Role to oversee risk stratification, manage bookings, create screening tools, streamline assessments, and track volumes.



**"You've always had the power, my dear. You just had to learn it for yourself." – Glinda the Good Witch**



**Background – "Once Upon a Time in Kansas" (Dorothy's Starting Point)**

Saratoga Hospital, a small nonprofit in Upstate New York, joined a five-facility regional network under Albany Medical Center and transitioned to the EPIC EHR system. The Surgical Home team developed a standardized surgical risk stratification tool to align with established anesthesia guidelines, ensuring pre-procedure optimization testing is performed only when clinically necessary—such as for significant comorbidities, abnormal exam findings, or high-risk procedures. This initiative aimed to reduce unnecessary testing, lower costs and co-pays, enhance patient satisfaction, and improve outcomes, guiding the Pre-Admission Testing (PAT) team through a challenging but transformative EPIC adventure.

**Start Here**

