

Policy Level: University of Washington Medicine  
Policy Title: **UW Medicine Epic Access and Training Policy**  
Policy Number:  
Date Established: 1/1/2016  
Date Revised:  
Date of Last Cyclic Review:

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### **Purpose**

To ensure patient safety and efficient revenue flow, all UW Medicine staff who utilize the Epic electronic healthcare system are required to complete training prior to receiving appropriate access to the Epic system. This policy applies to employees of UW Medicine and any outside vendors.

As a result of the Epic Access Process Improvement Initiative, consistent procedures were established for granting security permissions in the Epic system. A key aspect of these procedures is that a user will be limited to view-only access until he/she completes the required training for each Epic application.

### **Policy**

**Required Epic training must take place prior to gaining complete access to each application for all staff that use Epic.** New employees will register or be registered for their required training before or immediately after the New Employee Orientation (NEO). Existing UW Medicine staff who transfer to a position that requires new or different Epic access will register or be registered for their required training before or immediately after onboarding in their new department. The required training must consist of standardized curricula delivered by one of the UW Medicine enterprise education teams: Epic Revenue Cycle Operations (ERCO), UW Physicians (UWP) Training & QA, or any other approved entity training group. Training groups will document completion of required training in the Learning Management System (LMS). The Epic Core Systems (ECS) team will set up new or modify existing user Epic access after receiving the training completion report.

Epic training includes standardized instruction on any Epic application, including but not limited to: Admission/Discharge/Transfer (ADT), Hospital Billing, Professional Billing, Prelude, Cadence, Referrals and Research.

The level of access to the Epic system will vary by job role, and the associated training will result in specific security permissions within the Epic system. The security access will

be granted only after successful completion of the required training, the reporting of that in the UW Medicine Learning Management System (LMS) by the instructor, the availability of the appropriate Epic shell account and any other required information.

**Roles and Responsibilities**

Managers of staff who need access, or additional access, to Epic will ensure their staff members are registered for the appropriate training according to their job responsibilities.

Instructors of Epic classes will ensure that all attendees who pass their courses are recorded as Completed in the LMS on the day the trainee completes the course.

Epic Core Systems (ECS) will ensure that trainees marked as Completed will receive the appropriate Epic security access. Managers and users can expect the access to Epic available within two full business days after the training. If additional information is needed in order to grant correct access, managers may be contacted by ECS.

Questions related to Epic user access can be directed to Epic Core Systems (ECS) by e-mail at [epiccore@u.washington.edu](mailto:epiccore@u.washington.edu).

Questions related to Epic training requirements can be directed to corresponding training groups. Questions related to ORCA or EpicCare training and registration can be directed to UW Medicine CIS Education by email at [regedemr@uw.edu](mailto:regedemr@uw.edu). For non-EpicCare, please contact the Epic Revenue Cycle Operations training team at [ctrain@uw.edu](mailto:ctrain@uw.edu).

**Approvals**

  
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Cathy Boelke

1-28-16  
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