Checklist for Rolling Out the Applied Epic Browser Interface

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Technical Preparation

○ **Move to Applied Epic Cloud and Update Your Software**

Before rolling out the browser interface, your organization must be on Applied Epic® Cloud, meaning your Applied Epic data is hosted in the cloud environment and not on your own servers. We also recommend being on the latest version of Applied Epic to ensure the best user experience in the browser interface.

○ **Consider Integrated Identity Management**

You can use your organization's identity provider (IdP) for additional security protection. Review **Understanding Identity Management with Applied** for additional information, or **contact Applied Support** with questions. If changes are required to your IdP, we recommend making the necessary changes and deploying them before the browser interface pilot.

If your organization has enabled Single Sign-On within Applied Epic, you'll need to change this method of logon to "Require Password Authentication" before accessing the browser interface.

○ **Review Recommended Network and Computer Settings**

There are multiple settings on your network and individual computer that can affect the performance of Applied Epic in the browser environment. Review the Applied Community. Knowledge Base articles below for recommended settings to ensure the best user experience.

- **Update Network and Firewall Settings**
- **Configure Native Messaging Allow List**
- **Allow Pop-ups for Applied Epic**
- **Update Browser Cookie Settings**
- **Verify Default PDF Program**
- **Update Browser Performance Settings in Microsoft Edge**

○ **Obtain Your Unique Browser URL**

If you don't already have your browser URL, you can contact Applied Support. You will need your Enterprise ID the first time you log into the browser interface.

○ **Determine a Connection Suite Deployment Plan**

The Connection Suite is a set of components that enable components of Applied Epic to work in the internet browser and in conjunction with the Windows operating system. Typically, web-based products do not seamlessly integrate with Windows for security reasons. Once the components of the Connection Suite are loaded, programs such as Outlook and Microsoft Word integrate similarly to how they functioned within the desktop interface while also ensuring data security. For more information on the Connection Suite, review the **Epic Browser Interface FAQs**.

Install the Connection Suite Package in one of two ways:

- Your IT department can install the Connection Suite Package for all users, which we recommend. If you choose this option, provide the IT lead with the mass installation instructions in the **Epic Browser User Guide** on what the Connection Suite is and how it's deployed. Plan to push the mass installation before your browser launch date and send users detailed instructions on how to verify that their Connection Suite is up to date before the rollout.

- Or each user can install the Connection Suite Package individually. If you choose this option, enable the security object in Applied Epic > Configure > Security > Users or Security Groups (in General > General). Review the single-user installation instructions in the **Epic Browser User Guide** for more information.

Organizational Planning

○ **Identify Key Stakeholders**

Before rolling out the browser interface, your organization must be on Applied Epic® Cloud, meaning your Applied Epic data is hosted in the cloud environment and not on your own servers. We also recommend being on the latest version of Applied Epic to ensure the best user experience in the browser interface.

A dedicated team is key to leading the transition to the browser interface. These internal champions will advocate for this change among the rest of your staff. Change may be hard for some of your users, so having advocates in your agency will help others be more optimistic about the road ahead. Your team should include the following:

- **A program manager** who will lead this project, ensuring all participants know what to do and when during the pilot, all workflow changes are identified, and you have a solid plan to educate your staff.

- **An IT Lead** who will handle the technical requirements involved. This includes ensuring technical preparedness, installing the Connection Suite, and, depending on your setup, performing the initial troubleshooting when technical issues arise.

- **Participants** who will validate your organization's workflows. These power users are the individuals in your organization who are familiar with the department workflows and who use Applied Epic efficiently every day. They should be comfortable validating workflows and documenting their findings. We recommend representation from all departments, including Download Processing, Front Desk/Mailroom, and Accounting.

○ **Determine Rollout Approach and Key Dates**

New you'll want to select a date to start the pilot program. Use these tips to help determine the right approach and timing for rolling the browser interface out to your organization.

A few questions to consider:

- Would it be best for all employees to go live on the browser interface at once, or would it be better to transition by department?

- If you have multiple locations, do you stagger the transition by office?

- We've seen other organizations roll out the Epic browser interface successfully in a number of ways. You know how your staff will likely best handle the change, so it's up to you which method to choose.

Decide on a date to begin piloting the browser interface, then a date to roll it out to everyone. Here are a few things to consider when setting those dates:

- Avoid staff conflicts due to time away from the office.

- Avoid time frames that conflict with other large projects.

- We recommend that the pilot phase lasts at least 30 days to test workflows and help your power users develop the habits necessary to become most efficient in this new environment.

- Take into consideration any seasons tied directly to your business, such as high renewal periods or high enrollment months. Introducing change during these peak times could potentially negatively impact your rollout success.

○ Plan for Change Management

The Epic browser interface has the same capabilities as the desktop interface, just in a more modern design. This means things may work a little differently than you're used to, but the core purpose of each Applied Epic workflow remains the same. Here are some tips to make this change easier on everyone:

- **Gain buy-in from leadership:** Your leadership team, including your top executives, must be on board and supportive of your staff making this transition. The leadership team must empower your program manager and key stakeholders to effectively lead and empathize with the staff as they adjust to this transition.

- **Communicate with your staff:** It's important to communicate the "what, why and when" so your staff knows what's expected and can prepare appropriately. To help you with this, we created a **Communication Plan** that has email templates you can use to communicate with your staff at different points in the process, including:
  - 30+ days before the transition to announce the change
  - 5–15 days before the transition as a reminder
  - On the day of launch to provide login instructions and directions to get help should they run into any issues or need assistance

- **Get staff excited:** Drum up excitement about the browser interface by explaining to your team how it will make their jobs easier. Share this demo video with your team so they can see the simplified and improved user experience for themselves.

- **Support your staff:** Have a plan for how you will support your staff post-launch. See the Ongoing Support section below for some ideas.

○ Begin Pilot Program with Power Users

It's time to begin the pilot. This step is recommended if you want to validate all workflows for all positions within the organization on a smaller scale. Through this pilot phase, you will build champions in different departments and understand how the rest of the staff will be impacted so you can clearly communicate with them to ensure a successful rollout.

Provide power users with the following as they begin the pilot phase:

- Your unique browser URL and Enterprise ID are required the first time for login.

- The **Workflow Validation Spreadsheet** is where your power users can track which workflows have been validated and if any differences need to be documented.

- The **Epic Browser User Guide** highlights system areas that function differently in the browser. Your power users will want this handy as they begin testing workflows.

- The **Epic Browser Usage Tips** article available in Applied University has helpful advice for users new to the browser interface.

Once all workflows have been tested for each department and role and process documentation have been updated, you can successfully end the pilot phase. You are now ready to move the rest of your staff to the browser interface!

Browser Go Live

○ **Provide Staff with Updated Workflows**

This step may not be necessary for all roles, but this training is helpful for roles that have considerable changes. An example is the employee(s) who is responsible for scanning and faxing.
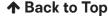
○ **Send Login Instructions to All Employees**

Send an announcement email to your staff with the following information:

- Epic browser interface login instructions, including your unique browser URL, Enterprise ID, and Database name (if users have more than one option to choose from).

- **Internet Browser Tips** video demonstrates how to manage and search browser tabs, pin tab(s), and create a desktop shortcut.

- **Internet Browser Tab Grouping Tips** will demonstrate how tab grouping works and how it can help you better organize your browser tabs.

- Instructions for what users should do if they encounter problems or technical issues, such as an error message.

○ **Remove Shortcut to Desktop Interface**

To encourage adoption, we recommend removing the desktop shortcut from computers. Some organizations do this on the day of go–live, while others wait a week or two. Removing only the shortcut will still allow access to the desktop environment through Start > Settings > Apps if needed.

Ongoing Support

○ **Define How Staff Can Get Help**

Your organization should have a plan for how to help users if they run into issues, and how you support your staff is your decision based on available resources. Encourage users to report all issues so your team can partner with Applied if necessary to resolve them. While this may mean extra time initially, you will find it is critical to the success of your rollout. You don't want staff not to report issues, get frustrated, and go back to the desktop version.
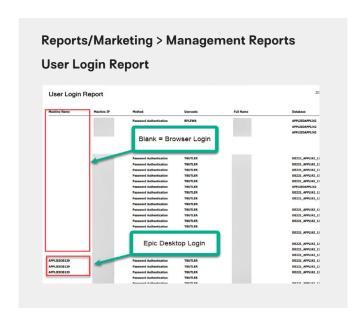
Larger organizations may have an internal helpdesk staffed by IT professional(s) who can assist with troubleshooting any issues as a first step. If you choose to go this route, we recommend the following:

- Leave a Zoom meeting open for the first few days of the transition. As users submit tickets that need to be researched further, invite them to join so they can be served in real time.
- Most issues will be related to the items listed in the Technical Preparation section above, so advise your IT staff to have those resources handy.
- For issues that need to be investigated by Applied, have your help desk contact Applied Support on the user's behalf.

Smaller organizations find it best for users to report issues to the key stakeholders, who will provide the first level of support. Then, after initial troubleshooting, if the problem cannot be resolved, contact Applied Support.

○ Review Login Activity

Reports/Marketing > Management Reports

User Login Report

Applied Epic has a report available to verify your team's browser usage. Under Reports > Management, run the User Login Report. The Machine Name column will be blank when a user logs in via the browser. This transparency into your team's login habits enables positive conversations where you can tackle any hesitation to using Epic in the browser environment.

○ Hold Regular Check-Ins with Staff

Finally, it's important to meet regularly with your key stakeholders and staff. Keep the lines of communication open for staff to provide feedback. This will enable you to keep a pulse on how your team is adjusting to this change and notice any pattern in issues they're encountering. This also provides for a better overall experience!

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