

Operational Reporting Alignment

The Quest for Data-Driven Cohesion

Amidst EHR Ecosystem Expansion: A Work in Progress

Customer: Large southeastern health system

Industry: Hospitals and Health Care

What was Needed

- A cohesive operating model with clearly defined roles and responsibilities, clearly defined deliverables, and the capacity to manage variation
- A means to achieve a unified Epic EHR reporting process, framework, and governance structure
- Buy-in from a wide range of multidisciplinary stakeholders to cultivate cultural change

What We Delivered

- Enterprise-wide analysis of existing reporting content, usage, and distribution, including security, analyst groups, and dashboards
- Strategy and roadmap for operational reporting rectification, including step-by-step process, project management, and timeline for achieving alignment
- A mechanism to drive consensus and value-driven momentum

Outcome

- In 6 months' time, the client was able to decrease report requests by 70%.

A Health System Customer Story: A Work In Progress

What is Operational Reporting?

In a nutshell, operational reporting is the process of regularly drawing on collected data to drive intelligence and insight about a healthcare organization's administrative, financial, legal, and clinical activities to run the business, enable continuous quality improvement, and support core functions of treatment and payment.

In theory, EHR/EMR systems (such as Oracle Cerner or Epic) are ideally suited to serve as a conduit for achieving data-driven prowess—a single source of truth for comprehensive operational reporting on a wide range of business functionalities across patient experience, HR, clinical documentation, governance, and the revenue cycle. In practice, as many modern health systems can attest, that can all seem like an impossible dream.

The Client Story

The Health System was formed by the merger of two regional health systems. This created an integrated community health organization serving a vast geography of people with over 20 hospitals, post-acute care, long-term care, behavioral health services, and a large multi-specialty group physician practice.

The health system engaged Healthlink Advisors to assist in realigning enterprise-wide operational reporting, which had grown increasingly fragmented and unsupported over many years.

Epic is the core EHR and financial system. Most reporting flows through Epic, but it was built to the specifications of one organization. When the entities merged, there was a lack of consistency and understanding across the organizations about what data meant and how data was defined. That resulted in many individual requests and a lot of variation.

Without a unified operational reporting structure, the outcome is a persistence of variation in the analytics, so the organization cannot collectively manage to understand its data.

The root cause of the problem is familiar to modern health systems grappling with unprecedented change, regardless of whether it stems from mergers and consolidation, shifts in patient demographics, regulation, or new reimbursement models — all uniquely compounded by pandemic upheaval, historically high turnover, and the continuous need to adapt fast-evolving technology to legacy processes and infrastructure. In fact, the number one key finding of the latest KLAS Research report on the issue, [Healthcare Operations 2023: Addressing Operational Challenges through Technology](#), was that the “vast majority of organizations lack a sophisticated operational strategy.”

Modern EHR systems may provide a means to implement sophisticated data-driven strategies to meet these challenges, but they are just tools. The people and processes within the organization drive the action and supply the solution.

Confronting the Common Cause of Chaos

The unwieldy operational reporting muddle is not an anomaly; it is actually exceedingly common in healthcare. Many health systems striving to become data-driven organizations will wisely invest in an Epic

ecosystem. However, the growth of that ecosystem is going to be challenged if the foundational elements of operational reporting are not in place and adhered to collectively along the EHR system's maturity path. This structural cohesion is what makes the expansion of the environment possible. However, the day-to-day function of transitioning facilities and groups within healthcare organizations poses unique challenges to structured data management and unified operational reporting, resulting in fragmentation.

The only way to achieve coherence and data mastery is to confront the issue directly with a concerted effort to identify sources of variation, reach consensus on policy, communicate approach, and enact consolidation. This is how you create a unified operational reporting structure, and this is what the client had engaged Healthlink Advisors to enable.

Key Challenges

- Different legacy systems and lack of data standards: The merged organization inherited disjointed data and reporting structures from pre-merger entities. There were no consistent data definitions or reporting standards.
- Proliferation of reports: With no centralized structure, customized and manual operational reporting proliferated, resulting in thousands of reports with extensive variation.
- Organizational silos: Distinct groups acting in silos had no alignment on core data structures, no mapped security classes, and did not utilize best practices for operational reporting.

Steps Taken with Healthlink Advisors

- Data rationalization: The analytics team rationalized and standardized data definitions across systems, establishing a baseline to reduce variation.
- Report analysis and consolidation: Duplicative and low-value reports were identified and eliminated. Over 3,000 operational reports have been consolidated down to ~900.
- Role-based access: Security roles and access levels were streamlined to balance usability and security.

Outcomes

- Increased self-service usage: Business analysts gained and adopted direct access to data through self-service tools, with reduced reliance on manual or static reports.
- Fewer access requests: Security role rationalization reduced ad-hoc requests.
- Focus on capabilities: Enabled stakeholders to visualize how data assets cross organizational boundaries.
- Cultural shift: Incremental success demonstrated value and built momentum for data-driven growth.

Key Takeaways

While Healthlink Advisors' work is ongoing, it has already produced results. Having an experienced perspective allowed the client to break the task down into attainable pieces and parts. The client receives fewer access requests because everyone is re-examining and reframing how data works in the organization. There's greater value in what the teams and the business learn. The insights learned from

the project form sage advice for healthcare organizations amidst strategic transformation:

- It's not just about technology: People, processes, and leadership are as important as systems in data-driven organizations.
- Action builds momentum: small wins create motivation and focus, leading to more significant achievements
- Involve stakeholders: Engaging siloed teams into unified workgroups builds a consensus.
- Think about capabilities: focusing on the capabilities needed (in addition to the tools you use) enables organizational alignment.
- Revised reporting structure allows for growth.

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