 JOHNS HOPKINS MEDICINE JOHNS HOPKINS HEALTH SYSTEM	Johns Hopkins Medicine Policy & Procedure	<i>Policy Number</i>	FIN124
	<i>SUBJECT</i> REGISTRATION AND SCHEDULING (EPIC AND MEDITECH) SYSTEM SECURITY ACCESS – TRAINING AND CERTIFICATION REQUIREMENTS	<i>Effective Date</i>	07-01-07
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POLICY

This policy applies to Johns Hopkins Medicine (JHM) and the following affiliated entities: The Johns Hopkins Hospital (JHH), Johns Hopkins Bayview Medical Center (JHBMC), and the Johns Hopkins School of Medicine (SOM).

PURPOSE


The purpose of this policy is to establish guidelines and procedures for ensuring that all staff are trained and evaluated for competence in using their respective registration and scheduling system and to ensure compliance with the accurate collection of appropriate registration data through the following:

- All staff must attend system and insurance training and be certified for competency prior to obtaining system access with edit functionality
- All staff must successfully complete an annual system certification for their job functions

A. JHH/EPIC

I. For new staff or staff changing job functions:

- 1) Managers or supervisors of staff requiring "functional" EPIC system access (ability to enter or edit information) are responsible for taking the following steps:
 - a) Request initial (view only) EPIC system access set-up through the JHMCIS security access group.
 - (i) EPIC Security Access staff will assign user ID and temporary password
 - (ii) Initial EPIC system access set-up will not provide functional system access
 - b) Register and schedule staff for EPIC system and insurance training via the Aspen Click2Learn Learning Management System (LMS). For assistance, contact the JHOC Training department at jhoc_training@jhmi.edu
 - c) Ensure staff's understanding that sharing EPIC system user ID's and passwords constitutes a JHH/JHHS major work rule violation that will result in disciplinary action up to and including termination.
- 2) EPIC system training is conducted on a regular two week cycle
 - a) Managers are encouraged to coordinate new employee start dates with the timing of the training cycle whenever possible
- 3) Staff must attend and complete EPIC system and insurance training appropriate for their job function prior to obtaining EPIC system access with edit functionality.
 - a) A 90% or better score must be achieved on all certifications
 - b) See Section III – for Failed Certification
- 4) The JHOC Training staff will notify JHMCIS Security Access, the JHMCIS EPIC group and the requesting manager/supervisor that the staff is cleared for access.
 - a) Notification will include confirmation of training and competency for modules and/or new pathways
 - b) The JHOC Training group will assign and program the appropriate EPIC pathway and reporting group based on training completed and department affiliation.
 - c) New/updated individual security access will become effective at the beginning of the next business day following the staff's successful completion of training and certification.

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- d) Clinic managers/supervisors are responsible for providing new staff with their user ID and temporary password.
 - e) Clinic managers or supervisors should direct questions related to staff access to the JHOC Training Department.
- 5) The JHOC Training Department is the only group authorized to approve and assign functional EPIC system access.
- a) Under no circumstances will JHMCIS Security Access provide initial, or make changes in, functional EPIC system access.
 - i) All requests for same are to be directed via email to the JHOC Training Department
 - b) Requests for EPIC user ID and password resets should be made through the JHMCIS Help Desk


II. For existing staff:

- 1) The new manager of staff transferring to another department within the institution must contact the JHOC Training department and request access to new EPIC departments (clinic numbers).
 - a) JHOC Training will coordinate with JHMCIS the deactivation/activation of appropriate EPIC department (clinic number) access and reassignment to the appropriate EPIC report group.
- 2) Staff who have not logged onto the EPIC system for more than 100 days will be inactivated.
 - a) Managers/supervisors must contact the JHOC Training department to reactivate user access.
 - b) Should inactivated staff need to be reactivated during off hours or weekends, the request should be made through the JHMCIS Help Desk.
 - i) The JHMCIS Help Desk will notify the JHOC Training group via email for the following business day.
 - ii) Notification should include the name of the user, requesting supervisor, and work location.
- 3) Managers will be notified, via the Aspen Learning Management System (LMS), of each staff member's annual competency certification requirement one month in advance of the required assessment.
 - a) Staff must complete their annual certification before the end of their anniversary month (provides an approximate sixty (60) day period for staff to complete and pass the assessment). For example, if the employee's anniversary date is June 6, notification will be sent out on May 1 and recertification must occur prior to June 30 to prevent access from being inactivated.

III. Failed Certification:

- 1) Managers of staff who fail their certification will be notified by the JHOC Training Department. Staff must attend either the next available review or complete the training session on the appropriate material and complete and pass a recertification.
 - a) Staff access will be inactivated until they successfully complete their recertification.
- 2) Managers/supervisors whose staff member(s) do not pass two attempts should contact their Human Resources department for direction for further action.


Note: All communication regarding failure to schedule or not attend required review, retraining or recertification will be documented via email to the appropriate manager/supervisor from the JHOC Training department.

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B. JHBMC/Meditech

I. For new or departing staff or staff changing job functions:

- 1) Managers or supervisors of staff requiring "functional" Meditech system access (ability to enter or edit information) should take the following steps:
 - a) Request initial Meditech system access set-up and training through the JHBMC Ambulatory Training Department Training Request Form <G:\Training Request Form.doc> as soon as the employee's start date is assigned.
 - i) The Training Department will coordinate with IS Security Access staff who will assign user ID and temporary password
 - ii) Initial Meditech system access set-up will not provide functional system access
 - b) Staff will be registered and scheduled for Meditech basics, system and insurance training via the training staff who will notify the employee and manager of the training scheduled. For further assistance, call the Ambulatory Services Training department at 410.550.0896.
 - c) Staff are not permitted to share Meditech system user ID's and passwords; doing so constitutes a major work rule violation.
 - d) Managers or Supervisors should notify the Training Department of staff resignations and the effective date for deactivation in Meditech.
- 2) Meditech system training is conducted on a regular weekly cycle as closely matched to the Hospital Orientation as scheduling permits.
 - a) Managers are encouraged to coordinate new employee start dates with the timing of the training cycle whenever possible.
- 3) Staff must attend and complete Meditech system and insurance training appropriate for their job function prior to obtaining Meditech system access with edit functionality.
 - a) An 80% or better score must be achieved on all certifications.
- 4) The Ambulatory Services Training staff will grant access to Meditech modules, CWS and ARM and notify the requesting manager/supervisor that the staff is cleared for access.
 - a) Notification will include confirmation of training and competency for modules and/or new pathways
 - b) The Ambulatory Training group will assign and program the appropriate Meditech pathway and reporting group based on training completed and department affiliation.
 - c) New/updated individual security access will become effective at the beginning of the next business day following the staff's successful completion of training and certification.
 - d) Clinic managers/supervisors are responsible for providing new staff with their user ID and temporary password.
 - e) Clinic managers or supervisors should direct questions related to staff access to the Ambulatory Services Training Department.
- 5) The Ambulatory Services Training Department is the only group authorized to approve and assign functional Meditech system access.
 - a) Under no circumstances will Bayview IS Security Access provide initial, or make changes in, functional Meditech system access for CWS and ARM.
 - i) All requests for same are to be directed to the Ambulatory Services Training Department
 - b) Requests for Meditech user ID and password **resets** should be made through the JHMCIS Help Desk

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II. For existing staff:


- 1) The new manager of staff transferring to another department within the institution must contact the Ambulatory Services Training department and request access to new Meditech departments (clinic locations). G:\Training Request Form.doc
 - a) Ambulatory Services Training will coordinate with JHMCIS the deactivation/activation of appropriate Meditech department (clinic location) access and reassignment to the appropriate Meditech report group.

- 2) Staff who have not logged onto the Meditech system for more than 100 days will be inactivated.
 - a) Managers/supervisors must contact the Ambulatory Services Training department to reactivate user access.
 - b) Should inactivated staff need to be reactivated during off hours or weekends, the request should be made through the JHMCIS Help Desk.
 - i) The JHMCIS Help Desk will notify the Ambulatory Services Training group via email for the following business day.
 - ii) Notification should include the name of the user, requesting supervisor, and work location.

- 3) Managers will be notified, via the Ambulatory Services Training Department, of each staff member's annual competency certification requirement one month in advance of the required assessment.
 - a) Staff must complete their annual certification in May or June of each year. If a competency has been administered in the preceding 90 days with a score of at least 80%, the annual competency is waived until the next year.

- 4) Failed Certification – Managers of staff who fail their certification will be notified. Staff must attend refresher training on the appropriate material and complete and pass a recertification.
 - a) Staff access may be inactivated until they successfully complete their recertification.
 - b) Managers/supervisors whose staff member(s) do not pass two attempts should contact their Human Resources department for direction for further action.

Note: All communication regarding failure to schedule or not attend required review, retraining or recertification will be documented via email to the appropriate manager/supervisor from the Ambulatory Services Training department.

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REFERENCES

JHHS Finance Policies and Procedures Manual


SPONSORS

Administrator, Ambulatory Services (JHH, CPA)
 Sr. Director, JHM Access Services
 Administrator, Ambulatory Services (JHBMC)
 Administrative Manager, (JHBMC)

CYCLE REVIEW

Three (3) years

APPROVAL

 Vice President & CFO, JHM


 Vice President of Finance/CFO and Treasurer, JHHS

 Date
 7-9-09

 Date

 Assistant Dean & Executive Director, CPA

 Date