

Student Health and Mental Health Services

The Epic Journey **Begins**

Summer Workflow Discovery &
Readiness Kickoff

June 18, 2026

Our Holistic Strategic Vision

Unified Patient Ecosystem

We are migrating from Point and Click (PnC) to a modern, integrated instance of Epic hosted by UC San Diego Health.

By connecting Physical Health (SHS), Counseling Services (CAPS), SWIFT (Crisis), and the community under one umbrella, we deliver on the promise of complete, whole-person patient care, quality and continuity of care.

Unprecedented Institutional Support

To ensure this project scales securely, **UCOP is committing \$2,000,000** to the implementation:

- **\$1,000,000** directly allocated to UC Riverside
- **\$1,000,000** directly allocated to UC San Diego Health

Est. implementation timeframe: 12 months

WHY EPIC? ENGINES OF EFFICIENCY



Care Everywhere

Seamless Global Chart
Sharing

Instantly retrieve external records from other Epic health systems (including UCSD, local hospitals, and UC systems) in real-time, eliminating manual fax and release delays.



AI-Supported Charting

Intelligent Administrative
Relief

Integrates ambient listening (DAX Copilot) and secure generative AI tools to automatically draft comprehensive clinical summaries and securely pre-populate portal responses.



Standardized Templates

Speed & Clinical Safety

Utilizes peer-reviewed, evidence-based standard documentation templates, medical order sets, and counseling intake workflows to slash dual-entry and manual checklists.



Operational Velocity

Administrative Power

Unlocks instant self-scheduling, digitized pre-visit forms, real-time insurance eligibility checks, and automated billing workflows to return premium clinical time to patient care.

Governance Structure

Executive Committee

Strategic Direction & Escalation

Responsible for overall project governance, timeline approvals, budgetary allocations, and final resource commitments.

Sponsor & Leader	Project Role	Core Focus & Escalation Pathway
Jackie Rodriguez	Executive Sponsor	Overall holistic clinical strategy, timeline alignments, and final UCR sign-off.
Dr. Kenneth Han	Chief Medical Officer	SHS Clinical Workflow validation, templates standard, and medical safety.
Dr. Elizabeth Mondragon	Senior Director, Mental Health Services	CAPS/SWIFT Clinical Workflow, psychological safety standards, and behavioral modules.
Matt Gunkel	AVC & CIO	Technical architecture, SSO, security protocols, and infrastructure standards.
Teri Eckman	Executive Director, SIS	Registrar systems interfaces, academic loads, and data integrations.
Additional Project Support:		
Evan Caldwell	Clinical Applications Analyst	Interfaces with Epic such as Orchard & Harvest
Rehan Tahir	ITS Associate Director	ITS Project Manager for duration of Epic implementation
Deborah Lin	HWS Product Manager	Supporting discovery and implementation
Ariana Martinez	Administrative Project Manager	Supporting all departments and ensuring action item tracking and compilation for UCR/UCSD
Alex Profeta	Project Business Analyst	Epic implementation Coordinator for Holistic health and wellness

STEERING COMMITTEE

Operational Guidance & Risk Review

Coordinates interdisciplinary decisions, manages operational risk identification, and monitors readiness plans across sites.

Walter Bayubay
Clinical Lab Supervisor

Loretta Mead
Associate Director CAPS

Erica Castillo
Patient Services and Billing Supervisor

Eryn Parks
Assistant Director, CAPS

Adelaida Diaz
Assoc. Director, Campus Int. Applications

Angela Peak
Quality and Compliance Specialist III

Hernan Salazar
Nursing Manager

Sam Tran
Pharmacy Manager

Jennifer Hung
Associate Director, CAPS

Gloria Vera
Mental Health Services Program

Nikki McAndrew
Asst. Director, Administrative Operations

11 KEY STAKEHOLDERS

14 ACTIVE FUNCTIONAL WORKGROUPS

The Frontlines (14 Active Streams)

Validates workflows, maps fits/gaps, builds inventories, and secures operational readiness in individual specialty spaces.



Clinical Streams

- Medical Clinical Workflow
- Behavioral Health Clinical Workflows
- Nursing Workflow
- Lab & Pharmacy
- Radiology Workflow



Patient Access & Admin

- Scheduling & Registration
- Billing & Collections
- My UCR Chart (Portal)
- Communication & Change
- Privacy & Compliance



Systems & Support

- Users & Security
- Printing & Hardware
- Reporting & Analytics
- IT Infrastructure Support

Summer Discovery and Workshops

Our Staff Participation Model

Engagement Across All Tiers

To maximize representation while minimizing meeting fatigue, we are executing a split-participation model:

- **SME Focus Groups:** High-focused live sessions with representative system experts demonstrating actual PnC scenarios.
- **Parallel Readiness (All Staff):** Active clinical and administrative validation of physical forms, data requirements, and local inventories.
- Identifying Super Users and Subject matter experts in each area as needed, through all stages of the project.

Guiding Principle:

Document differences—do not attempt to engineer solutions or request system custom-builds in the middle of standard workshops.



Our Summer Discovery Methodology

Fit-to-Standard (Fit/Gap) Approach

We will utilize a structured process to analyze current systems against standard Epic designs.

Working sessions focus groups will be Facilitated by:

1. Deborah Lin, Product Manager
2. Alex Profeta, Project Business Analyst

- 1 **Live Current State Demo:** SMEs perform daily PnC workflows in PnC test.
- 2 **UCSD Standard Review:** Compare steps with live UCSD Epic configuration
- 3 **Fit/Gap Analysis:** Document "Fits" vs. "Gaps" (regulatory, policy, billing).



| Defining the Summer Workgroups

Setting Clear Operational Expectations for All Staff

We are embarking on an intensive summer discovery phase. Success requires that we enter these sessions with the correct mental framework.

What These Sessions ARE

An Opportunity to Align and Prepare:

- Identify and document our **current-state** clinical & administrative workflows in PnC.
- Map how our work compares to established, live Epic workflows built by UCSD.
- Document potential or legitimate local regulatory or compliance gaps.
- Identify any potential opportunities or enhancements

What These Sessions ARE NOT

Large Customization or Complaints:

- **No Change of Global Epic Processes:** UCSD's Core design is standard; we cannot build custom local versions. We will be able to customize workflows to meet our department needs.
- **No Complaining About Standards:** Standardized clinics improve safety. We must adapt to standard Epic workflows.

Protecting Clinical Care Hours

Dividing Our Summer Labors Into Two Tracks

Clinical patient hours are premium. To protect medical and counseling slots, we have separated workflows strategically into specialized, non-overlapping channels.

Every other Thursday clinic will be closed 8 AM – 10 AM

Exception: August 6th and September 10th are full day Staff In-Service Days

Track 1: Clinical (Fixed Closures)

Patient-Facing Workflows:

Utilizes currently scheduled clinic closure slots on designated Thursday mornings. Strategically prioritize clinical workflows where providers, nurses, lab, and therapy staff are vital.

Preserves patient schedule during active medical hours.

Track 2: Admin & Back-Office

Non-Patient Back Office Operations:

Administrative and operational workflows may be scheduled entirely independently as standalone focus group sessions, shielding clinical specialists from unnecessary administrative meetings.

Includes Billing, Compliance, and Portal setups.

Track 1: Clinical Closures

Date (2026)	Workflow & Focus Area	Aligned Workgroup
July 9, 2026	Arrival & Check-In: Kiosk, lateness enforcement, eligibility CAPS Front Desk: Sched. rules, routing, initial assessment	Registration & Scheduling
July 23, 2026	Scheduling: Auto/Self-booking, templates, slot overrides CAPS Urgent Care: Booking, charting, surveys, triage Radiology: Orders, accession, result loops	Registration & Scheduling / CAPS Clinical / Radiology
Aug 20, 2026	Nursing: Vitals, triage, vaccinations, order setup CAPS Providers: Indiv/Group therapy, tele-health SHS Providers: Charting templates, Rx, Orders, Referrals	Nursing / CAPS Clinical / SHS Clinical Workflow
Sep 3, 2026	Lab: Walk-ins, orders, results, public health reporting Pharmacy: Orders, fill queue, dispensing validation CAPS Supervision: Trainee workflows, sign-offs, referrals	Lab / Pharmacy / CAPS Clinical Workflow

Track 2: Admin & Back-Office Sessions

To make sure non-clinical support operations are thoroughly validated without taking away from direct patient-care hours, these vital sessions are scheduled independently outside of the Thursday clinic closures.



Compliance Workflow

Holds & Record Verifications

Standardizing immunization holds and student records checks.



Billing & collections

Charge Capture Integration

Aligning professional billing loops and claims processing pipelines.



My UCR Chart & Portal

Digital Patient Front Door

Refining student self-scheduling, pre-visit forms, and e-consents.

| The Documentation Framework

Leads: Deborah Lin, Product Manager & Alex Profeta, Project Business Analyst

Primary Workshop Registries

Tier 1 - The Fit/Gap Register:

1. Our unified source of truth. Captures each clinical step, the current PnC path, the UCSD Epic blueprint reference, fit status, and follow-up flags.
2. **Decision & Open Questions Log:** Saves pending operational issues requiring formal leadership review through established project governance.

Deep-Dive Reference Matrices

Tier 2 - Operational Inventories:

1. **Visit Type Inventory:** Audit compiled by Deb Lin from PnC usage. Evaluates appointment blocks to streamline template scheduling.
2. **Forms & Templates Inventory:** Catalog of clinical forms, questionnaires, and student consents.
3. **Reporting & Analytics Catalog:** Identifies business and compliance data requirements.

| Next Step: Staff Prep Worksheet

1. Describe Your Core Tasks Identify the primary 3 to 5 workflows you run daily inside Point and Click (e.g., walk-in triages, referral transfers, or charting templates).

3. Track Tasks Run Outside PnC Note manual workarounds (e.g., maintaining Excel logs, paper printouts, or Microsoft Teams threads to coordinate student handoffs).

2. Inventory Forms & Questionnaires Audit the specific clinical check-lists, letters, or health questionnaires that you rely on to manage your patient flows.

4. Submit via Qualtrics Complete the digital readiness survey built by Deb Lin to document your unique clinical expertise and highlight areas needing focus.



Trainings and Timeline

SPRING 2027: EPIC TRAINING RUNWAY

Structured Training Phases

We have mapped out a thorough, sequential path to ensure full competence before launch day:

Phase 1: Curriculum Development (Early Spring) - Constructing UCR-specific, role-based instruction matrices and manuals.

Phase 2: Super User Credentialing (Mid-Spring) - Empowering local leads with intensive, deep-dive system certification.

Phase 3: General End-User Training (Late Spring) - Conducting structured, interactive training pathways for all staff.

"No One Swims Alone"

The organization is providing complete operational support and safeguards to protect your transition:

The Epic Playground: Log into active sandbox practice environments using mock patient charts to test your routines safely.

Dedicated Training Time: Clinical schedule templates will be intentionally modified to grant you distraction-free learning blocks.

At-the-Elbow Floor Support: Local super users and trainers will stand physically with you during the July 2027 Go-Live weeks.

Scaling the **Peak** Together

Holistic Student Health & Wellness Epic Implementation

**MOU
FINALIZATION**
June 2026

**Summer
Discovery**
Summer 2026

**IT Build Scope
Finalized**
October 2026

SME Training
January 2027

**Staff/Department
Training**
Spring 2027

**Immunization
Module Go-Live**
May 2027

**Full Clinical Go
Live**
July 2027

Stabilization
Summer 2027

Optimization
Fall 2027

Project Closure
November 2027

Have Question? Reach out to the Holistic Health and Wellness Administrative Project Manager:
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