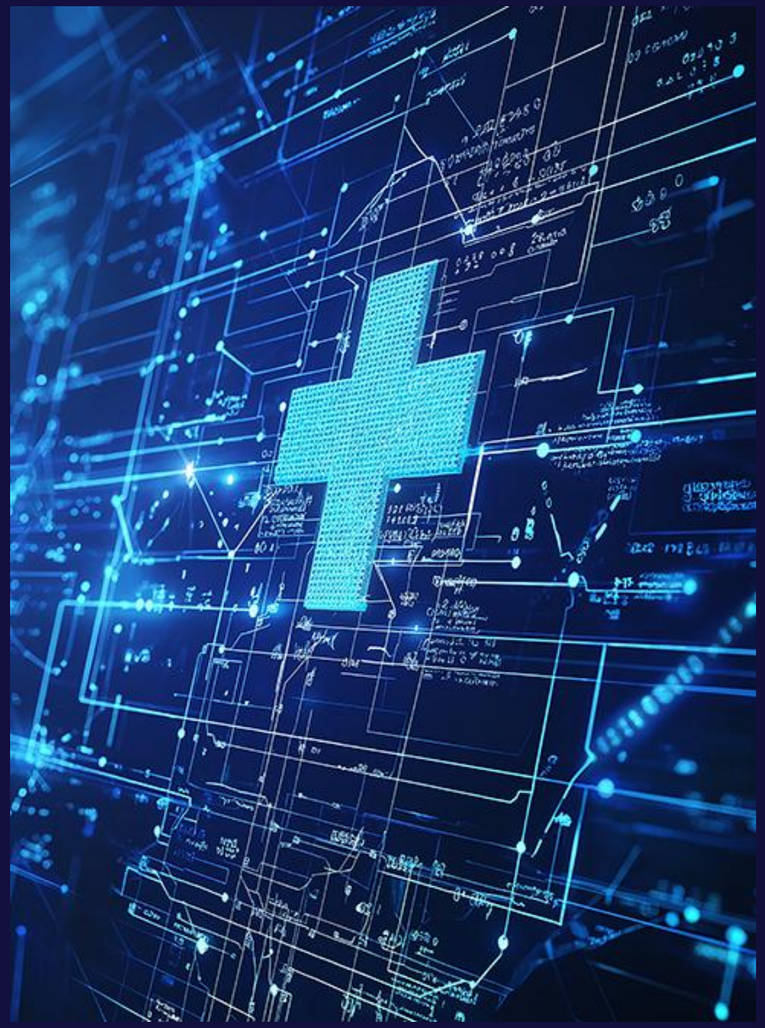


How Health Systems Can Join the EMR Cloud Journey

Presentation for New Jersey & Metro Philadelphia
HFMA 50th Anniversary Annual Institute

Bringing Our Experience to the Health Care Industry



Jamie McGlothlin

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Jamie is a seasoned health care analytics expert with 35 years of experience, including 13 years in consulting for health systems. With a PhD in computer science and 19 peer-reviewed publications in leading health care conferences, Jamie has helped clients achieve millions of dollars in ROI through improvements in clinical quality, patient safety, operational efficiency, and cost reduction.

RSM Health Care Advisory Services

3,000+
health care clients across the United States



LARGEST
U.S. provider of audit, tax and consulting services to the middle market

Delivering The Power of Being Understood

450+
professionals serving the health care industry



Industry involvement through **CHIME, HIMSS, HFMA, ACHE, VIVE, AMIA**





8th largest health care consulting firm (Modern Health)

A health care-focused service delivery model with a high level of partner involvement

First-choice advisor to health care organizations

Bringing Our Experience to the Health Care Industry



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Manager

Healthcare Analytics
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Colin is a health care consultant with 10 years of experience helping health systems use data, technology and AI to improve financial and operational performance. He has led revenue cycle transformation, EHR implementations and enterprise analytics initiatives. Colin specializes in AI workflows and business case development, helping leaders quantify and prioritize investments that deliver measurable financial outcomes.

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2026

Cloud Advantages and Considerations

Advantages of Moving to the Cloud



Challenges with Moving to the Cloud

Cost

- Cost is harder to know
- Cost can be greater
- Dual licenses during transition

Migration Level of Effort

- Migrating data
- Migrating visualizations
- Consolidating tools
- Time to train the team

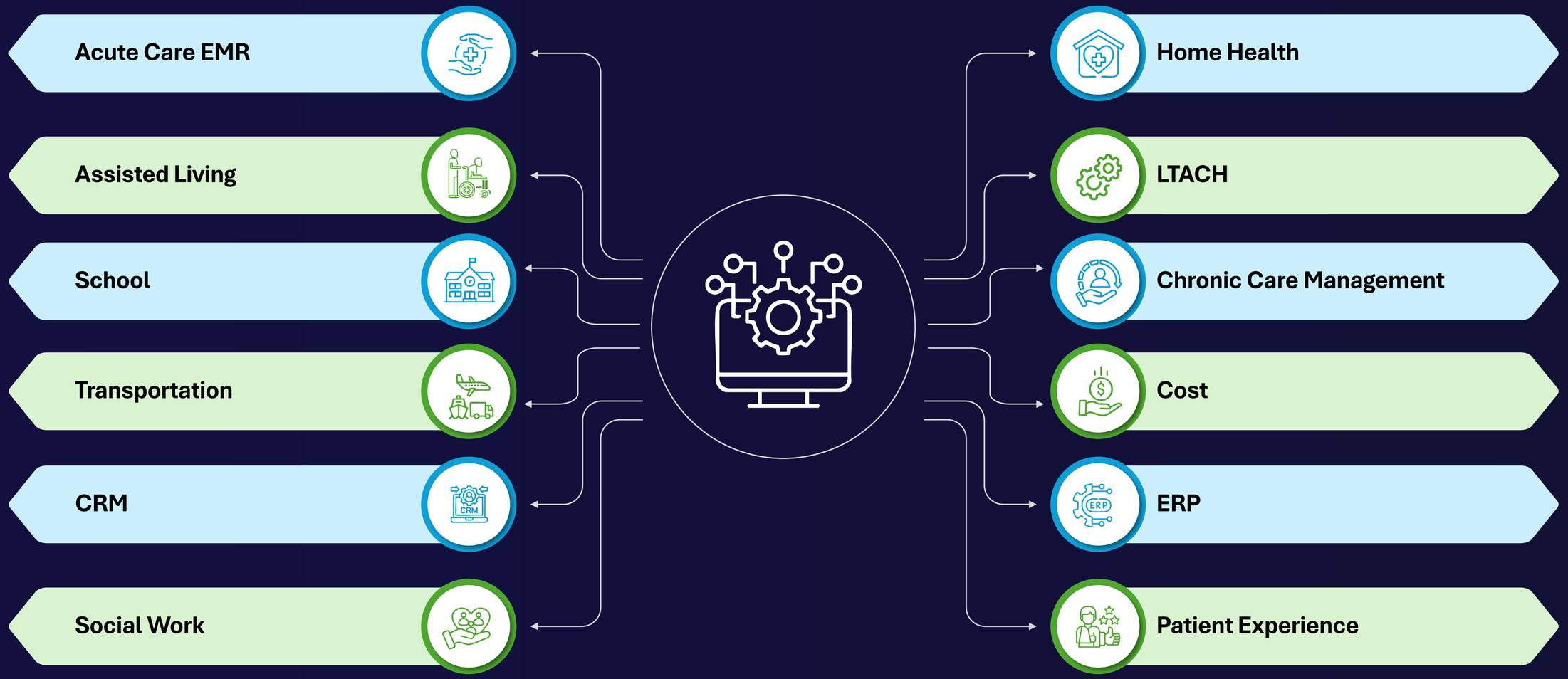
Timeline

- Organizational Priorities
- Transition period

Security

- Regulations and Requirements

Example Integrations



The Value of Large External Datasets

Accessing or even integrating large external data sources can provide valuable insight

Benchmarks

Quality, Supply Cost, RVU, LOS, Patient Experience

Claims

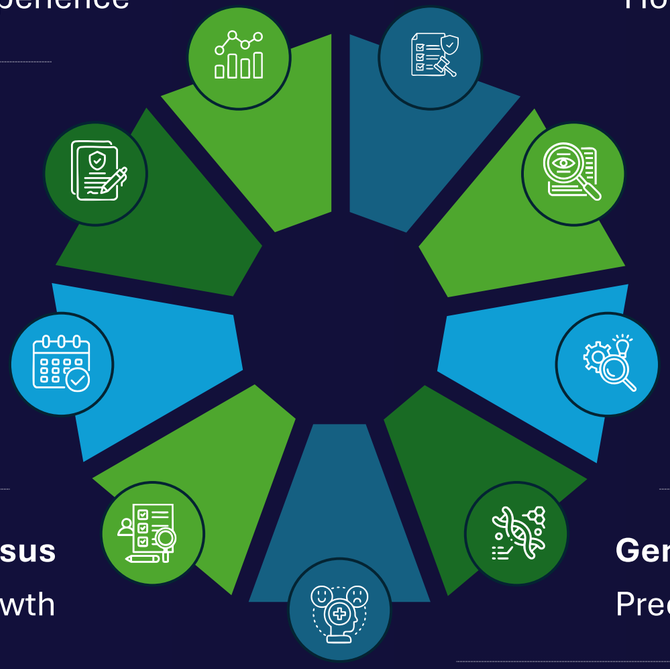
Market analysis, referral management

Calendars

Holidays, Events, Weather, Air Quality

Census

Demographics, Population Growth



Social Determinants of Health

Housing, Traffic, Nutrition, Legal data

Transparency

Payer Transparency, Provider Transparency Pricing

Research

Public datasets, NIH, Clinical Trials

Genome

Precision Medicine, Research

Social Work and Behavioral Health

Adverse Events, Contact Details

What is Microsoft Fabric?

A single SaaS analytics platform that unifies data movement, engineering, warehousing, real-time analytics, BI and AI on one copy of the data.

One SaaS platform

Every analytics workload in one Microsoft-managed service - no servers to size, patch or stitch together. Capacity is bought once and shared across all workloads.

OneLake: one copy of data

A single tenant-wide data lake in open Delta Parquet. Shortcuts point at data where it already lives - in place, with no copies or duplicate pipelines.

Governed and AI-ready

Purview governance, lineage and sensitivity labels apply across workloads, with Copilot and the semantic model built in for self-service and AI use cases.

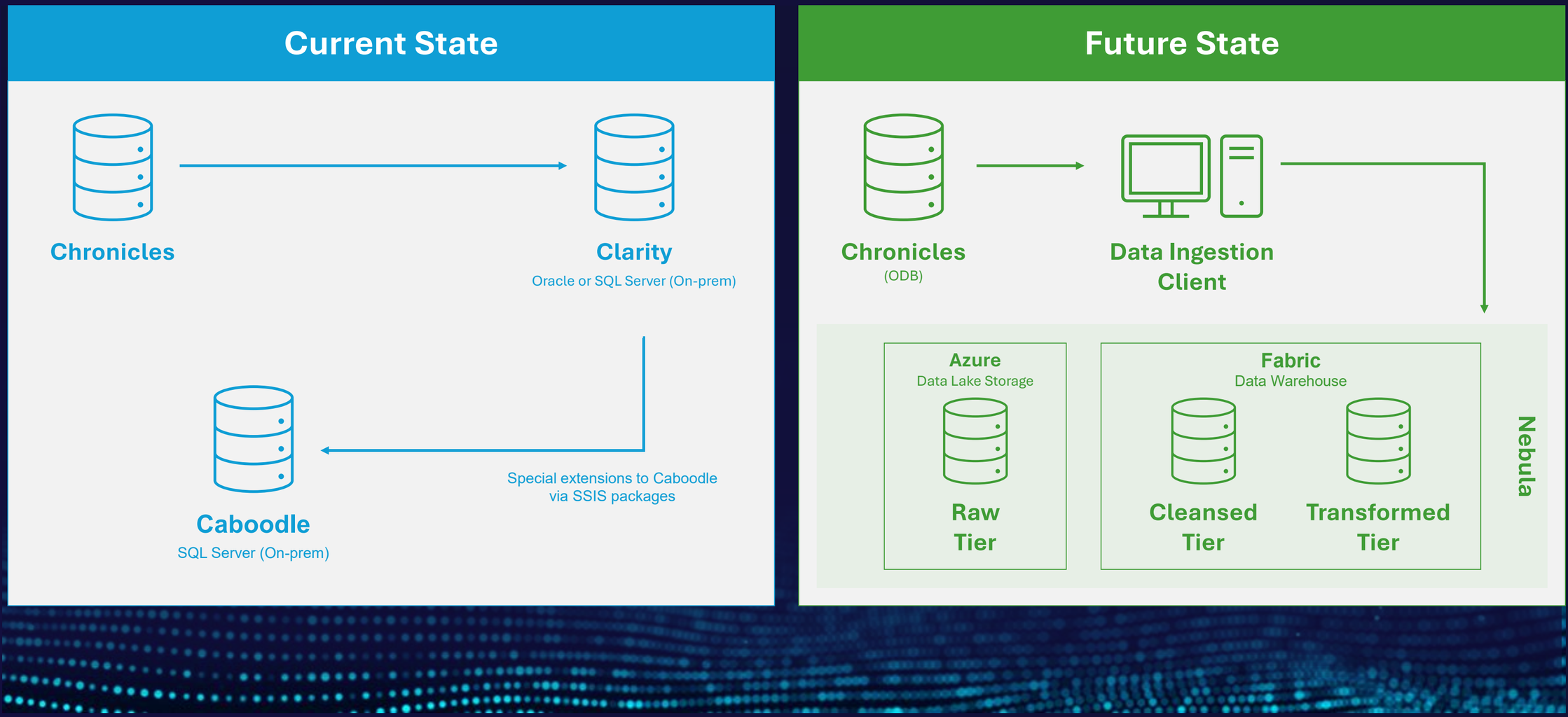
Workloads delivered on the same platform

Each is a first-class experience, sharing one security model, one lake and one capacity.

- **Data Factory** — Ingestion and pipelines
- **Data Engineering** — Spark and lakehouse
- **Data Warehouse** — SQL at scale
- **Real-Time Intelligence** — Streaming and events
- **Power BI** — Reporting and self-service
- **Data Science and AI** — ML models and Copilot

Why it matters for IDA: fewer tools to license and integrate, one governed copy of Corewell data, and a faster path from source to insight.

Epic Cogito


Current State
Chronicles
Clarity
Oracle or SQL Server (On-prem)
Special extensions to Caboodle
via SSIS packages
Caboodle
SQL Server (On-prem)
Future State
Chronicles
(ODB)
Data Ingestion
Client
Azure
Data Lake Storage
Raw
Tier
Fabric
Data Warehouse
Cleansed
Tier
Transformed
Tier
Nebula

Why Transition to Cogito Cloud?

Epic Fabric Value Proposition

- Hourly Refresh
  Get data faster
- Managed Service
- Generative AI & machine learning capabilities
  Emmie enablement
- Shortcuts
  Use data without copying
- Data Enclaves and Shares
- Genomics
- Community Registries & OMOP Standard Supported
- MyChart Analytics



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Epic Cloud Use Case
Corewell Health

Corewell Health at a glance

Michigan's largest health system and employer - integrated care delivery and coverage, including Priority Health

$17.6B

2025 operating revenue

Up 7.5% year over year; $9.8B net patient service revenue

21 hospitals

Care delivery footprint

300+ outpatient locations plus post-acute facilities across Michigan

5,000+ licensed beds

60,000+

Team members

Including 11,500+ physicians and APPs and 16,000+ nurses

1.4M+

Priority Health members

Provider-sponsored health plan; one of Michigan's largest insurers

$7.4B

Premium revenue from coverage

Health plan premiums grew from $6.9B in 2024, roughly 42% of operating revenue

9,000+

Employers

Contracted and served by Priority Health

Sources: corewellhealth.org/about; Corewell Health 2025 audited consolidated financial statements (published Feb. 2026).

Technology Stack

Key Sources

Epic

qualtrics

workday

salesforce

UKG

Support Systems

Strata

servicenow

vizient

Streamlit

alteryx

Technology (at start)

Power BI

Microsoft

Qlik

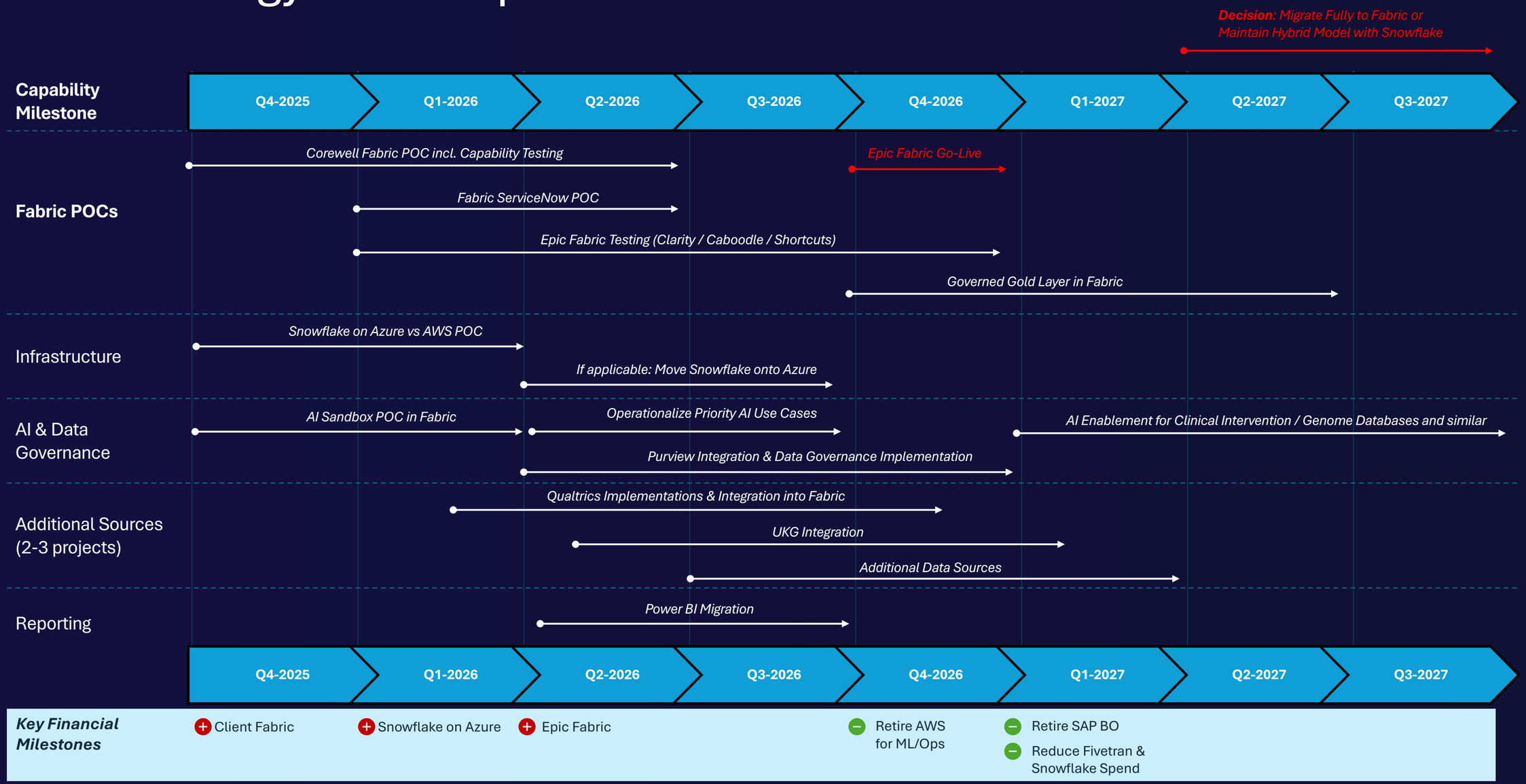
snowflake

Fivetran

SAP BusinessObjects

tableau

Data Strategy Roadmap



Engagement Goals



Independent Data Stewardship

Keep control of all enterprise data, not just what Epic chooses to expose. Develop a non-Epic Fabric seamlessly integrated with Epic.

Cost-Optimized Architecture

Design a roadmap, platform, BI tools and refresh strategies to balance insight with affordability and standardization.

AI & Advanced Analytics Enablement

Prepare the environment to fuel predictive models, machine learning, and innovation across systems.

Prove it

Create meaningful tests, proofs of concept and decision points. Prove out theories without performing throwaway work.

The Approach

A collaborative path built with Microsoft, the Client and RSM

Start Small and Prove Value

- Targeted proofs of concept using Microsoft Fabric, Power BI, AI and Epic Data
- Focused on real use cases, not theory
- Designed to learn quickly and build confidence

Establish a Shared Foundation

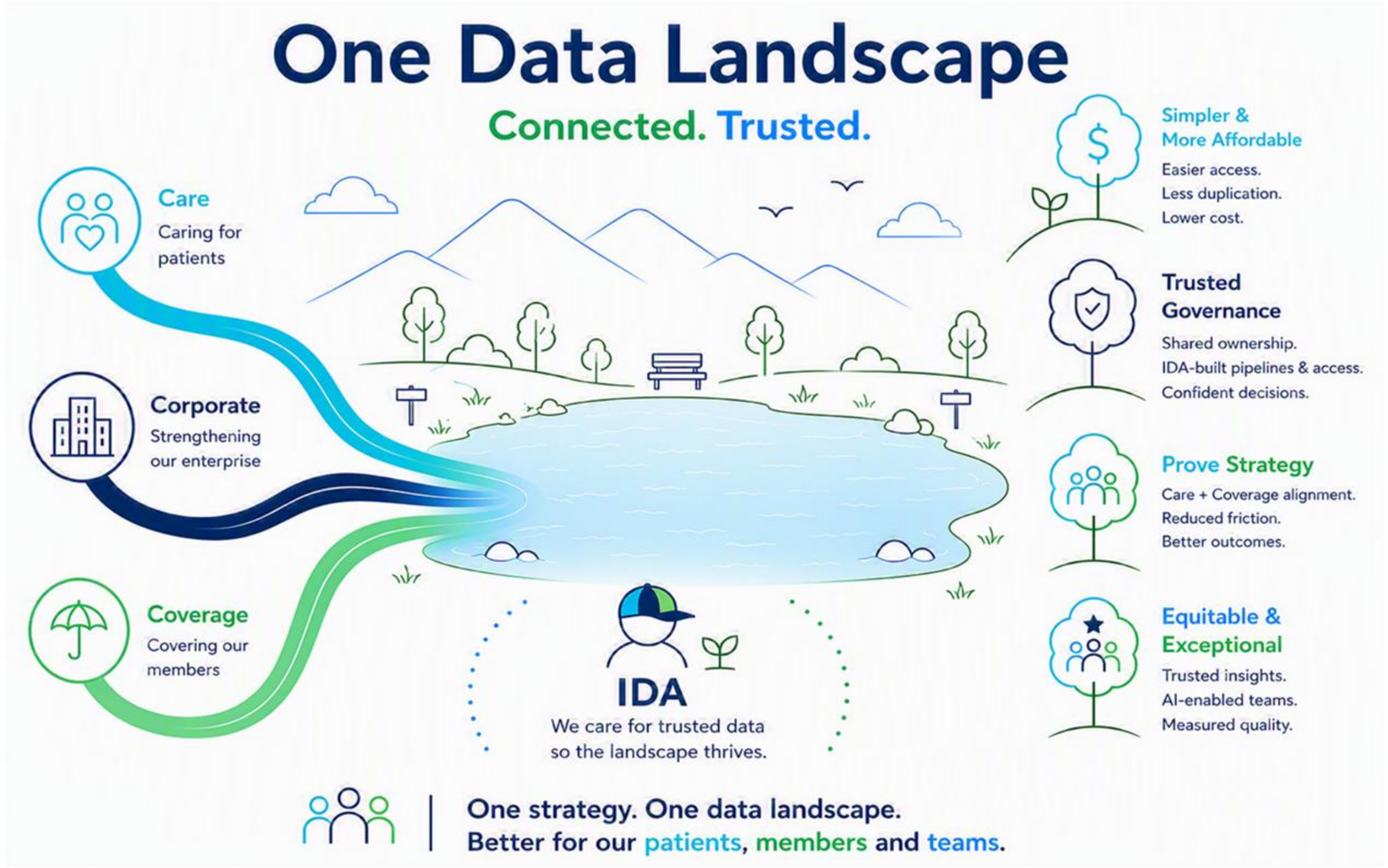
- Place Epic-adjacent data closer to Epic-enabled Microsoft Fabric
- Reduce friction between clinical, operational, and financial data
- Create a foundation that supports future growth without disruption

Connect, Not Disrupt

- Thoughtful integration with Snowflake where it already adds value
- Leverage modern capabilities like shortcuts and shared tables. Align platforms over time rather than forcing change

Simplify How Insights Are Delivered

- Bring analytics tools closer together where it makes sense
- Reduce overlap and complexity across reporting platforms
- Make it easier for teams to find and trust the data they need
- Consolidate Business Intelligence Tools to Fabric Capacity
- Sunset SAP and Qlik, scale down Tableau, Snowflake, AWS


One Data Landscape
Connected. Trusted.
Care
Caring for patients
Corporate
Strengthening our enterprise
Coverage
Covering our members
IDA
We care for trusted data so the landscape thrives.
Simpler & More Affordable
Easier access.
Less duplication.
Lower cost.
Trusted Governance
Shared ownership.
IDA-built pipelines & access.
Confident decisions.
Prove Strategy
Care + Coverage alignment.
Reduced friction.
Better outcomes.
Equitable & Exceptional
Trusted insights.
AI-enabled teams.
Measured quality.
One strategy. One data landscape.
Better for our patients, members and teams.

One Data Landscape – Guiding Principles



Simpler

Native Foundations (Epic, Workday, UKG, Microsoft etc.)

Standardized, Complimentary Data Tools

Data & Analytics Catalog

Increased Literacy via Education & Training



More Affordable

Aligned Team Members

Cloud-based Data Platforms

Reduced Data Replication

Retirement of Old Stuff

AI-Enabled



Equitable & Exceptional

Insights & Decisions are made by Team Members from Trusted Data

Ownership & Governance of Trusted Data is shared

Data Engineering and Data Security/Access happens in IDA

AI helps Team Members

AI value and quality is measured

Fabric + Snowflake Performance Validation

What We Tested

We conducted a series of performance, cost, and interoperability tests between Snowflake on Azure and Snowflake on AWS while interacting with Microsoft Fabric, including:

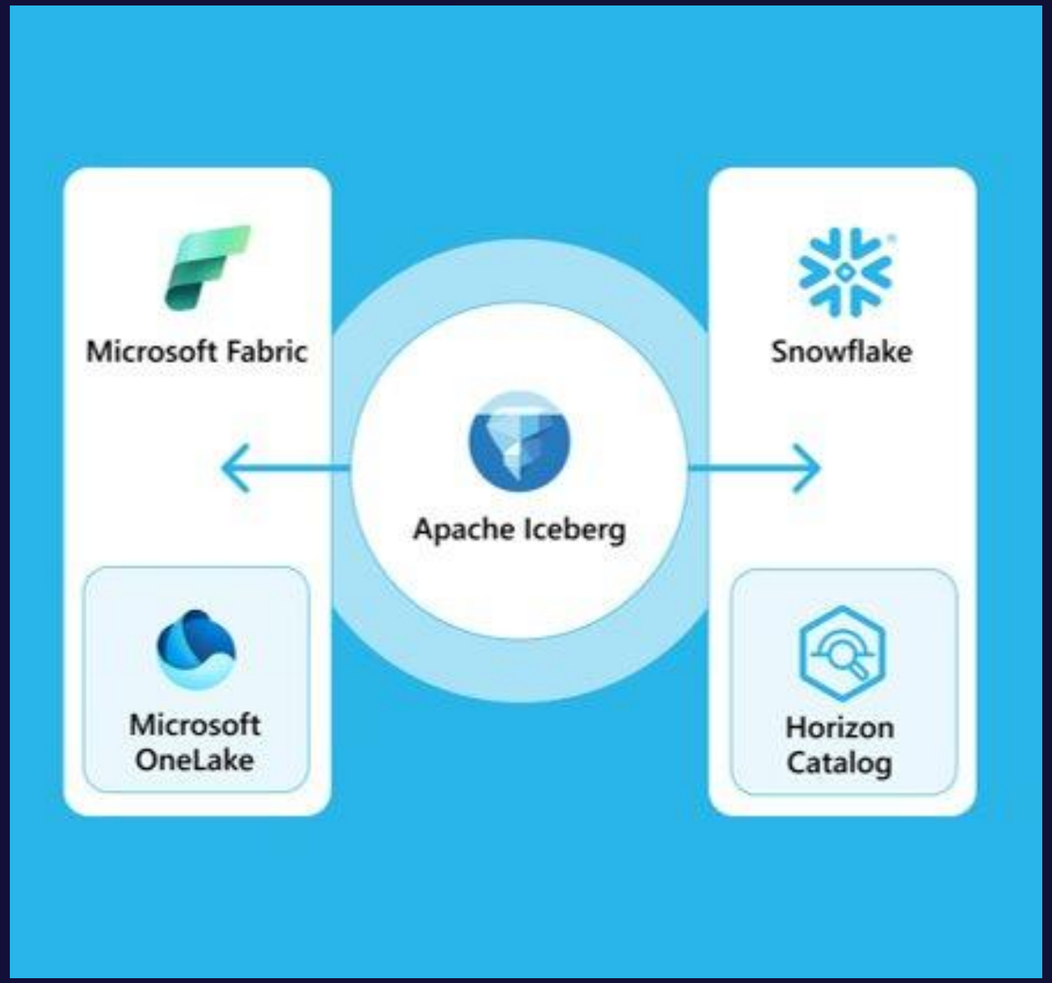
- Write performance from Snowflake → Fabric
- Read performance from Fabric → Snowflake
- Iceberg table interoperability
- Stored procedures and multi-table joins
- Query performance across native + Iceberg tables
- Power BI semantic model refresh against Fabric data

What We Proved

Iceberg "shortcut"
functionality worked as expected

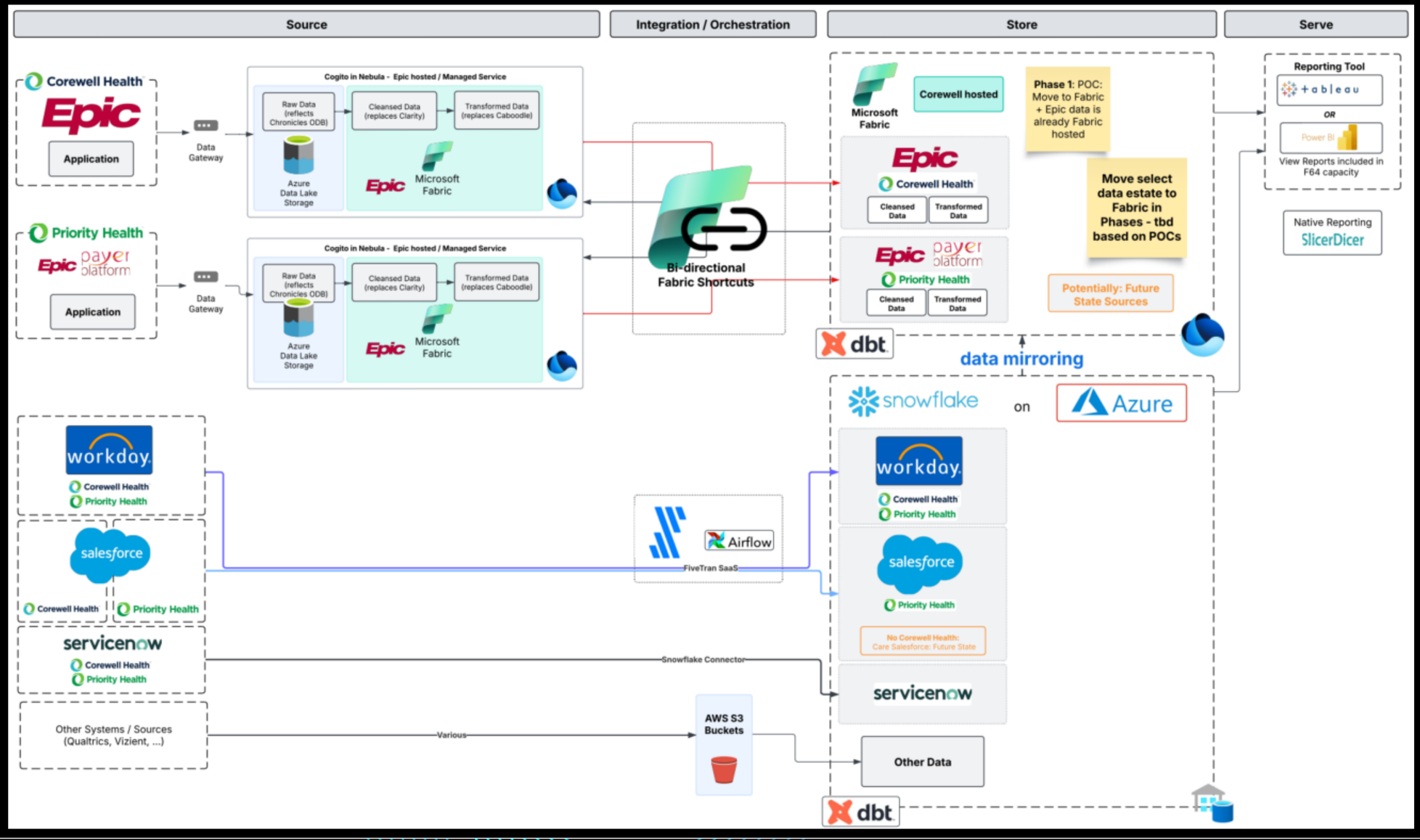
Snowflake on Azure was
13.2% faster than Snowflake on AWS

Estimated ~13% cost savings
when integrating with Epic Cogito Cloud



Future State Platform Selection - Option 2

Epic Fabric in Cogito Cloud & Hybrid Data Platform



Epic Fabric (Cogito Cloud)

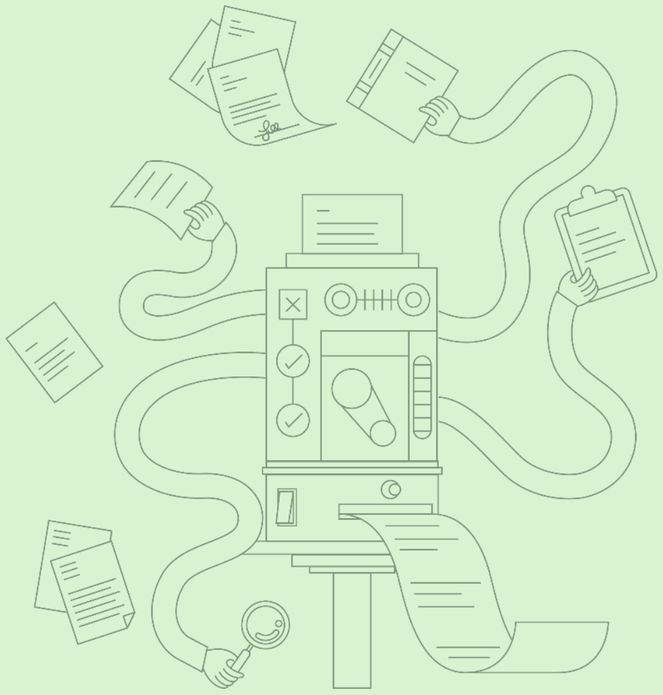
Corewell Fabric

Snowflake

Epic Data Movement | Workday Data Movement | Salesforce Data Movement | Other Data Movement

Finding savings

$3M+
in Savings Annually



Stop paying $ to copy data

Save $ on Fivetran, Qlik, dbt

Use Epic data in place

Reduce Snowflake cost

Consolidate BI and AI

Save on SAP, Qlik, Tableau, SageMaker, Streamlit

Increase Self-Service and Data Availability

Save $ on Fivetran, Qlik, BI staff. Leverage Copilot Agent to accelerate development and empower users

Hypothesis: IDA Platform Milestones - DRAFT



Hypothesis

IDA Platform Milestones - DRAFT

Scaling up: 2026 through 2027

- **Cogito Cloud** - non-prod POC Jul 2026, Clarity and Caboodle go-live Apr 2027, migration complete Oct 2027
- **Microsoft Fabric** - scaling through Q2 2027 across Data Factory, data engineering and Power BI; primary data platform from Q3 2027
- **Power BI** - training Q1-Q2 2026, migration Jul 2026 to Dec 2027, renewal Apr 2027
- **Workday Data Cloud** - in scope, specifics TBD
- **UKG DataHub** - in scope, specifics TBD
- **Sigma** - proof of concept only

Winding down: legacy platforms

- **Cogito on-prem** - retired once migration completes Nov 2027
- **Snowflake on AWS/Azure** - primary platform until Q2 2027, no new development after; renewals Oct 2026 and 2027
- **Tableau on-prem** - no new dashboards after Dec 2026, renewal Jan 2027
- **Fivetran** - reduced use to Aug 2026, no new development after Q2 2027
- **dbt Cloud** - retire Sep 2026; dbt Core still available for local use
- **Qlik Replicate** - reduced use through 2026, retire 2027
- **Informatica Cloud** - reduced use, migration timing TBD
- **Informatica PowerCenter** - retire with Mar 2026 renewal
- **GoAnywhere on-prem** - renewal Dec 2026, cloud alternative under review
- **Astronomer** - replace with comparable Fabric capability, renewal Jan 2027



Challenges

Data Engineering: Fabric, Snowflake and the Path Between

Where data belongs: Fabric vs. Snowflake

- Fabric: Epic-sourced clinical and operational data feeding Power BI and Copilot
- Fabric: new lakehouse engineering, real-time analytics and AI workloads
- Snowflake: mature marts and third-party applications already dependent on it
- Snowflake: established multi-cloud data sharing with external partners
- Decide by workload gravity - keep data closest to its primary consumers
- Name one system of record per domain rather than paying to store it twice

Migrating Snowflake data into Fabric

- Inventory workloads first and sequence by consumption and business value
- Use OneLake shortcuts or mirroring to read Snowflake data before copying it
- Land bulk history as Parquet or Delta in OneLake, then switch to incremental loads
- Leverage dbt pipelines to maintain consistent models
- Translate Snowflake SQL and stored procedures into Fabric notebooks or warehouse T-SQL
- Run both platforms in parallel and reconcile row counts and key metrics before cutover
- Retire Snowflake compute domain by domain so savings land as you migrate

BI Migration: Copilot, the Semantic Layer and Hybrid Data

Migrating Tableau with Copilot

- Point Copilot at Tableau workbooks to draft Power BI pages and DAX equivalents
- Migrate by subject area, not workbook by workbook, so logic consolidates as you go
- Keep a human review gate - Copilot drafts the report but does not certify it

Hybrid sources: Cogito Cloud and Snowflake

- Land Epic data from Cogito Cloud in OneLake and shortcut Snowflake tables in place
- Compose one semantic model across both so authors see a single, consistent source
- DirectQuery or mirroring where freshness matters, import where query speed matters

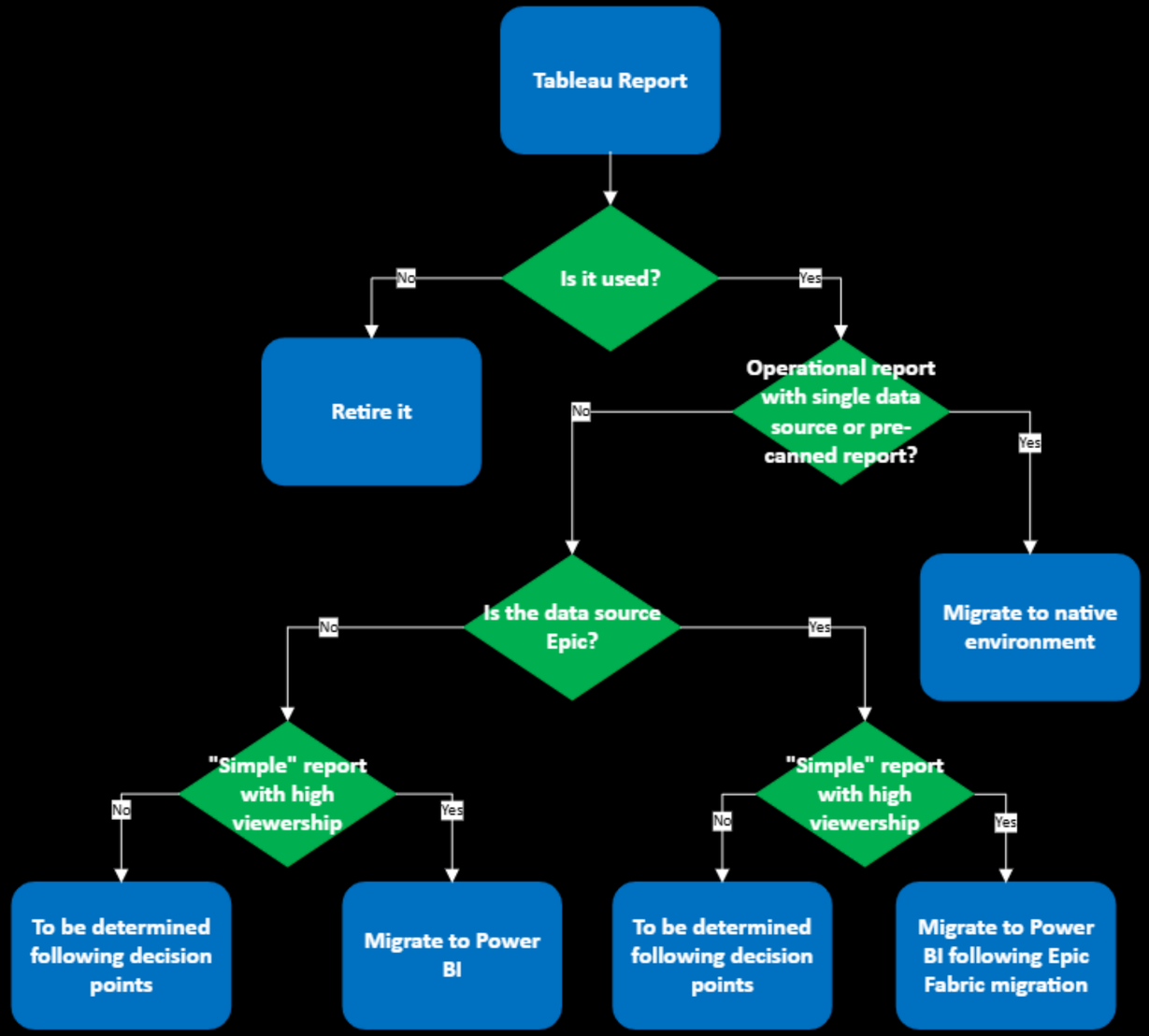
Protecting the semantic layer

- Build certified semantic models first so Copilot and authors share one definition
- Convert Tableau calculated fields into central DAX measures, not report-level copies
- Enforce naming, row-level security and certification before content is published widely

Enabling power users and knowing when to use AI

- Role-based enablement: authors learn modeling, consumers learn Copilot prompting
- Dashboards for monitoring known metrics, Copilot for ad hoc and exploratory questions
- Use generative AI to summarize and narrate, with the certified model as the source of truth

Migration Decision Tree



Explanation:

- Tableau reports with Epic data should be put on hold until the relevant Epic tables are in Fabric to avoid duplicating UAT work.
- High viewership is defined as >50 views for the workbook in the past 6 months (most accessed workbooks can be found in Tableau Custom Admin Views > Most Accessed Content)

Governance: Trusted Answers, Owned Metrics

Free-text Copilot with one version of the truth

- Ground Copilot only in certified semantic models, never in raw tables or ad hoc extracts
- Curate synonyms and verified answers so common questions resolve the same way every time
- Inherit row-level security and PHI rules so the answer respects who is asking

Defining business owners

- Name an accountable business owner per domain, paired with a technical data steward
- The owner approves the definition and any change to it; IT executes but does not decide
- Route exceptions and disputes to a standing data council with a clear decision path

Governing KPIs in the new BI portfolio

- Define every KPI once as a central measure and reuse it across every report
- Tier content as certified, promoted or personal, and publish only what is certified
- Review the portfolio on a cadence and retire duplicate or unused metrics

Documenting KPIs and business definitions

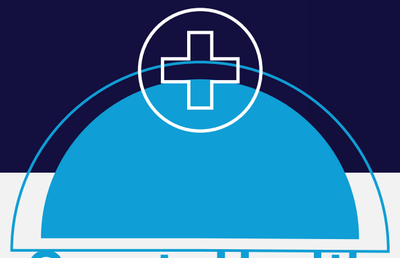
- Maintain a business glossary in the catalog, linked to the measures that implement it
- Capture calculation logic, source, grain, owner and refresh cadence for each KPI
- Surface the definition in the report and in Copilot answers so users see it in context



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Other Use Cases

Additional Use Cases



County Health Care District

- ERP (Oracle)
- Hospital EMR (Epic)
- Clinic EMR (Allscripts)
- Senior Care (MatrixCare)
- School, Staffing (UKG)
- CRM (Salesforce)



Organ Procurement

- EMR (TrueNorth)
- Quality System (QPulse)
- UNOS



Behavioral Health

- EMR (NextGen)
- Staffing (UKG)



Children's Specialty Hospital

- EMR (Meditech, MatrixCare)
- Education
- Referrals
- Home Health



Margin Improvement: Getting more value out of data

Data-guided Performance Improvement



1. Assess

- Analyze data
- Identify opportunities
- Quantify ROI potential
- Create a roadmap

2. Improve

- Process improvement
- Targeted analytics
- Data-guided, people-driven

3. Evaluate

- What worked, what didn't
- Measure against baseline

4. Sustain

- Analytics to monitor
- Processes to manage

Increasing Margin

Four levers analytics can pull - from growing revenue through to improving outcomes.

Increase Revenue

Do More
- Marketing analytics, surgical analytics, care gaps
- Capacity management and referral management

Capture More Revenue
- Registration and verification, clinical documentation
- Denials, accounts receivable, pricing analytics
- Case-level optimization

Reduce Cost

- Reduce length of stay
- Optimize staffing
- Manage utilization
- Reduce avoidable ED visits
- Reduce supply chain costs
- Increase automation
- Reduce clinical variation

Be More Efficient

- Patient movement
- Scheduling
- Productivity
- Surgical efficiency
- Automation

Do Better

- Reduce complications
- Readmissions
- Mortality
- Patient experience

Each lever is enabled by the same governed data foundation - one platform, one copy of the data.

Proven results from margin improvement work

Measured outcomes from prior health system engagements - hard dollars, capacity and quality.

$11.1M

Five-year savings, PICU poke reduction

12.5% fewer pokes in a 26-bed PICU through provider-facing cost and order analytics

$3.3M

Annual savings, blood utilization

23% fewer units transfused and 46% fewer non-indicated units using predictive thresholds

27%

Fewer avoidable ER visits

COPD care-gap management: medication adherence, wellness visits and targeted outreach

16% / 22% / 60%

Lower cost, readmissions, mortality

CHF clinical pathway also cut length of stay by 1.5 days

12%

Higher surgical block utilization

Plus 29% fewer empty staffed rooms and 25% fewer out-of-block minutes

78 to 24

Daily patients waiting for a bed

ICU bed waits down 33% and transfer cancellations down 40% with predictive capacity analytics

Source: RSM health care analytics margin improvement engagements - "Thinking Outside the Margins" (J. McGlothlin); several results peer-reviewed and published.



AI and Automation

USE CASES

A provider-specific AI portfolio

The strongest stories are rooted in real workflows: revenue cycle, patient access, care delivery.

Revenue cycle

- Payer negotiations
- Pricing optimization
- Claim status and summarization
- Prior authorization
- Appeal automation

Call Center

- Better narratives and more patient engagement
- Urgency detection
- Centralized scheduling
- Extract SDOH

Patient throughput

- Predict and mitigate bottlenecks
- Optimize resource allocation
- Model change before investing
- Streamline discharges

Surgery

- Optimize staffed hours
- Assign more accurate case levels
- Maximize block assignments and utilization

Care gaps

- Identify overdue care
- Track long-term care paths
- Identify patients for follow-up
- Avoid adverse events

Clinical Variation

- Reduce unnecessary costs
- Minimize unwarranted variation
- Improve forecasting
- Reduce supply cost and waste

Not every use case should scale.
The discipline is knowing which ones are ready, measurable and safe to expand.

Tactical approaches

Revenue cycle	Automate revenue cycle work processes such as prior authorization, independent dispute resolution and appeal letter generation
Fax automation	Automate the extraction and processing of inbound faxes
Messaging automation	Triage, categorize and route inbound patient messages. Suggest responses.
Chart summarization	Summarize patient chart data
Supply chain optimization	Predict demand, improving inventory management and contract comparison
Analytics	Move from dashboards and reports to asking questions about the data
Internal process optimization	Improve employee support, help desk, benefits, ticket optimization

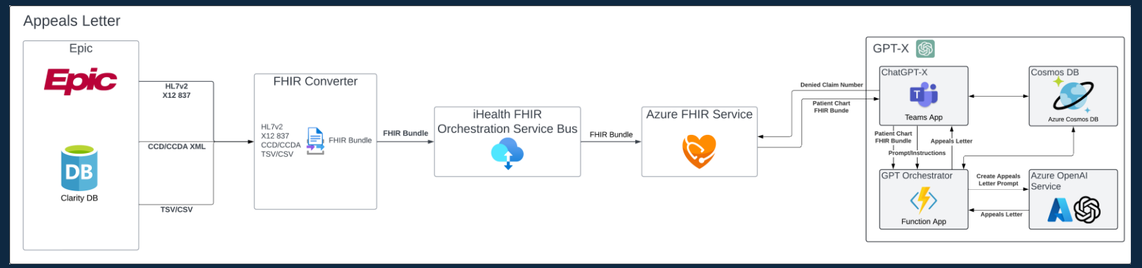
Case Study – Letters of Appeal Automation

Overview

RSM partnered with a hospital system to implement an AI-powered solution designed to support nurses in generating appeal letters for denied claims, seamlessly integrating into their existing workflows. Previously, nurses relied on Excel to manually select claims for appeal, utilizing payer-specific letter templates and composing each letter individually, resulting in variability due to differences in writing styles despite following standard guidelines. With the new AI solution, nurses simply input the Hospital Account Record (HAR) number, activating an automated process that retrieves pertinent patient and denial information, drafts the appeal letter, and provides an interface for final edits prior to export. Nurses now serve as editors, reviewing and approving each appeal before submission. While the client invested in the initial implementation, projected ROI analysis indicated profitability within seven months of going live.

- **Automated Appeal Generation:** Reduces drafting time and lets users review letters before signing and submitting them to the payer.
- **Resource-Heavy Process:** Drafting effective letters of appeal requires experienced clinical staff to review denial rationales, validate documentation, and tailor payer-specific arguments—raising labor costs and turnaround time.
- **Scalability Challenges:** As denial and appeal volumes grow, manually tracking deadlines, payer requirements, submission status, and follow-up activity becomes increasingly difficult, creating risk of missed filing windows and lost reimbursement.

Solution Flow Diagram:



Desired Outcomes

Increase

- Speed, consistency and accuracy in responding to payers' requests
- Speed of claims status determinations
- Cash flow from faster responses to requests
- Revenue from fewer denials

Decrease

- Manual work required to address denials
- Weekend overtime costs
- Number of denials
- Outstanding A/R

Return on Investment (ROI) Opportunity

Client Assumptions	Value	
Average Recovery per Case (Net Revenue)	$	12,000
Cases Appealed per Year		650
Case Overturn Rate		40%
Expected Increase in Cases Appealed		40%
Expected Improvement in Overturn Rate		10%
Extra Day Pay per year (Nurses)	$	20,000
Weekend Bonus Pay per year (Nurses)	$	20,000
Current State Annual Revenue from Overturned Cases	$	3,120,000
Future State Annual Revenue from Overturned Cases	$	5,460,000
Expected Annual Benefit (12 Months)	**$**	**2,340,000**
Expected Monthly Benefit	**$**	**195,000**

Use Case – Payer Policy Monitoring

Overview

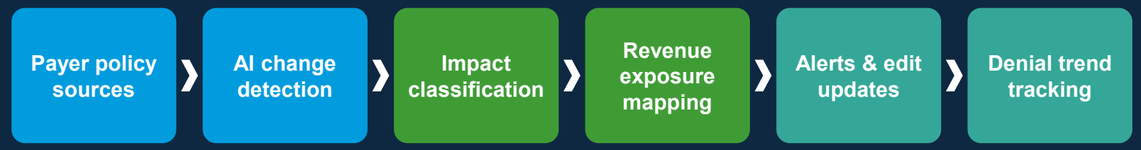
Payers update medical policies, coding rules, and authorization and documentation requirements continuously, publishing changes across dozens of portals, bulletins and provider manuals. Most organizations learn about a change only after denials start arriving. An AI-powered monitoring solution continuously ingests payer policy sources, detects what changed, summarizes it in plain language and classifies its impact by code, service line and payer. It then maps each change to the organization's own claim volume to quantify revenue exposure and routes alerts to owners, so claim edits, authorization lists and documentation workflows are updated before claims go out the door.

Continuous Change Detection: Every payer bulletin, policy and manual update is compared to the prior version so no change is missed.

Revenue Exposure Mapping: Each change is linked to affected CPT/HCPCS and ICD-10 codes and historical claim volume to prioritize what matters most.

Closed-Loop Action: Alerts drive updates to claim edits, authorization lists and documentation templates, and denial trends confirm the fix.

Process Flow Diagram:



Human-in-the-loop: revenue integrity owners validate each change before edits and workflows are updated.

Desired Outcomes

Increase

- Speed of awareness of payer changes
- Clean claim rate
- Consistency of policy interpretation
- Evidence for payer contract discussions

Decrease

- Manual review of payer websites and bulletins
- Denials caused by policy changes
- Rework and appeal volume
- Revenue leakage

Return on Investment (ROI) Opportunity - Illustrative

Client Assumptions	Value
Payer Policy Updates Reviewed per Year	1,800
Analyst Hours per Update (Manual)	3
Expected Reduction in Review Time with AI	60%
Loaded Analyst Cost per Hour	$50
Annual Labor Savings	**$162,000**
Denials Tied to Payer Policy Changes per Year	2,000
Average Net Revenue per Denied Claim	$2,500
Expected Denials Prevented	30%
Rework Cost Avoided per Denial	$118
Annual Revenue Protected + Rework Avoided	**$1,570,800**
Expected Annual Benefit (12 Months)	**$1,732,800**
Expected Monthly Benefit	**$144,400**

Illustrative mid-size health system. Benchmarks: CAQH Index, AMA, AHA.

Revenue Cycle AI Roadmap

Ten AI use cases that extend Epic across the revenue cycle: prevent denials, recover revenue and negotiate with evidence.

PREVENT Stop denials before the claim

★ **Payer Policy Monitoring**
Detects payer policy changes and maps revenue exposure before denials arrive

★ **Order Set / Care Path Alignment**
Flags where payer policy changes require updates to physician orders and care paths

Prior Authorization
Flags authorization needs, assembles clinical evidence and drafts requests

RECOVER Collect what the organization is owed

Denials Root Cause Identification
Traces denials to upstream causes across orders, registration, coding and policy

★ **Underpayment Identification**
Compares every payment to contract terms to find and recover shortfalls

Appeal Letters
Drafts payer-specific appeal letters from denial and chart data

Independent Dispute Resolution (IDR)
Prepares No Surprises Act dispute filings and tracks deadlines

STRATEGIZE Negotiate and price with evidence

Payer Performance Scorecard
Rates each payer on denials, underpayments, delays and policy changes

Payer Negotiations
Combines scorecard and market rate data to build the negotiation case

Rational Pricing
Sets defensible charges using market rates, cost and reimbursement data



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2026

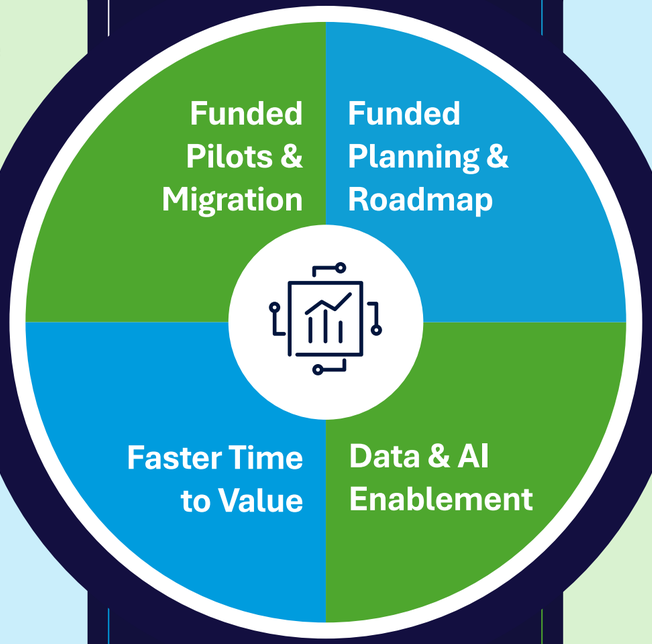
Getting Started

Microsoft’s Azure Accelerate program can co-fund pilots, planning & migration

Kickstart Your Fabric Journey with Microsoft Funding

Microsoft offsets costs for clients to stand up their own Fabric or migrate Snowflake to Azure, including proof-of-concept builds

Microsoft provides up to $25K to support an assessment and roadmap—helping hospitals plan their Fabric and data strategy at little to no cost



Achieve measurable ROI faster with co-funded pilots and guided execution

Support for data migration, integration, and AI readiness on Fabric

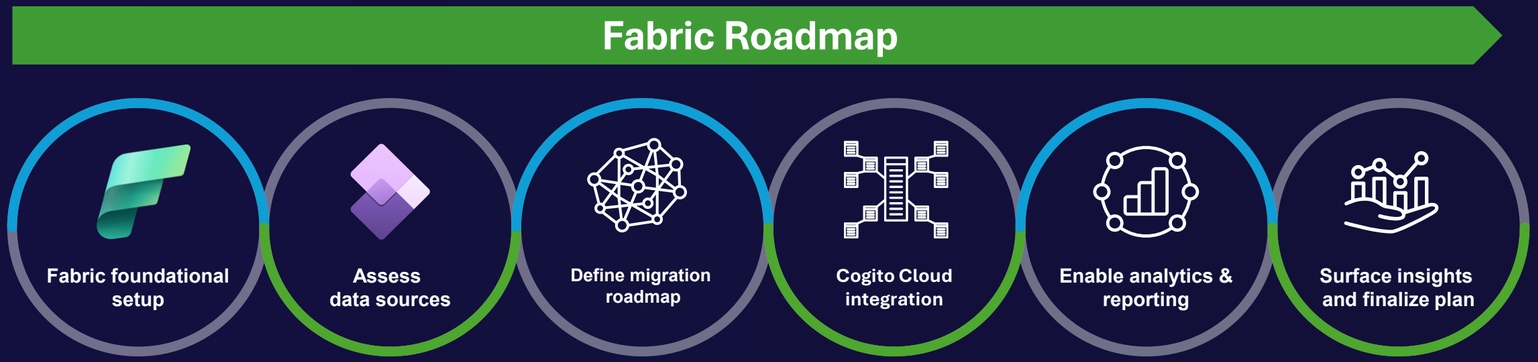
Microsoft Fabric:

Unified analytics platform

- **Seamless integration** within the **Microsoft ecosystem** (e.g., Power BI, Azure, OneLake)
- Optimized for **real-time analytics** and insights
- **Unified data architecture** that simplifies analytics and governance
- **Shortcuts & Mirroring**

Fabric Roadmap for Epic Healthcare Customers

RSM is uniquely positioned to support end users at the right time and in the right place, aligning day-to-day Epic workflows with the data transformation needed to drive real adoption and outcomes. This enables, for the first time, the integration of Epic data with external clinical, operational, and financial data sources into a unified, trusted view for decision-making and true return on investment.



Our engagement methodology

Fabric Roadmap

The Fabric Roadmap creates the plan for health systems to migrate to the cloud and integrate with Epic's data lake. This exercise includes:

- Evaluating tools and existing platforms
- Identifying key data sources
- Outlining integration strategy with Microsoft Fabric and other platforms
- Sequencing migration phases and timelines
- Cost and ROI analysis to guide decision-making

Key Deliverables

- Tools Rationalization
- Data Platform Roadmap
- Migration Plan
- Cost and ROI Assessment

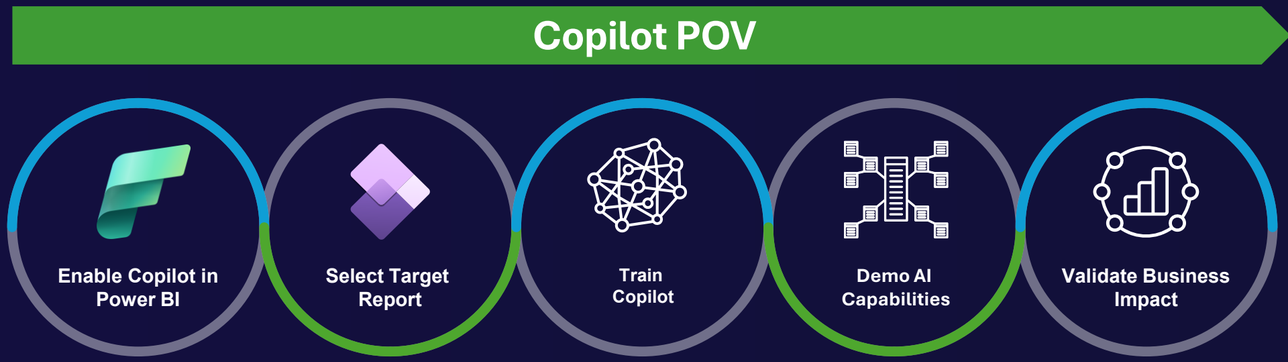
Critical Decisions We Help With

- When to migrate to Cogito Cloud.
- Which legacy tools to retire or retain.
- How to integrate Epic data with enterprise data lakes.
- Cost and ROI modeling for cloud adoption.

Governance, change management, operational readiness, and end-user adoption across every phase.

Copilot AI Power BI for Epic POV

Demonstrate AI-driven insights and productivity in Power BI for Epic health care clients.



Phase	Estimated fees
Fabric POV	$15,000
Microsoft Funding	($15,000)
TOTAL	$0.00

Our engagement methodology

Copilot POV

The Copilot POV demonstrates how AI can transform reporting and analytics in Power BI. With Epic transitioning to Microsoft Fabric, this enables users to ask questions of the Epic health care data. This also allows a health system to see the value and cost savings of Power BI. We enable Copilot on a selected report, train it on commonly asked business questions, and showcase how users can interact with data using natural language. This exercise highlights potential efficiency gains, improved insights, and the value of AI-driven analytics for healthcare organizations.

Key Deliverables

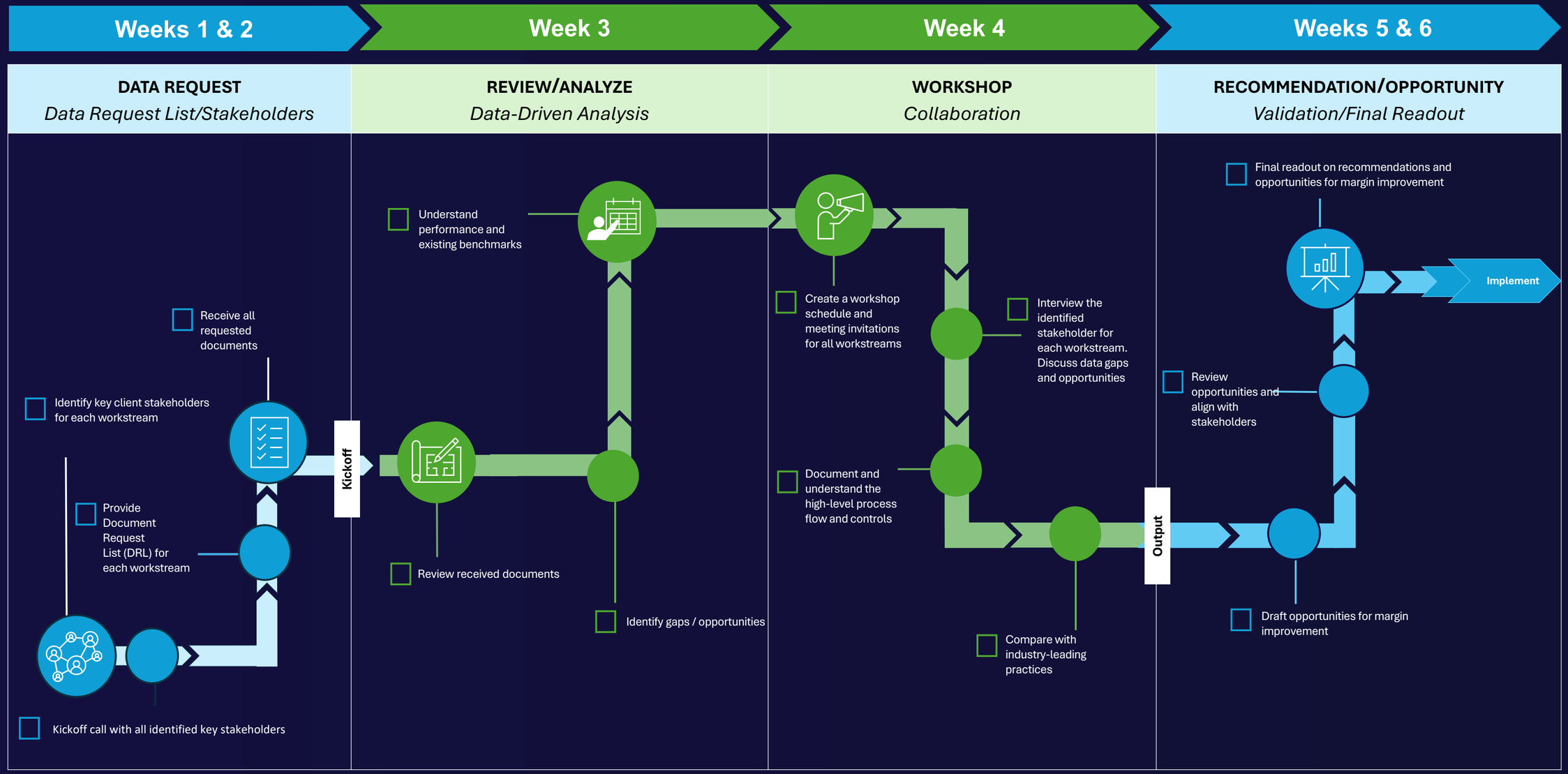
- Copilot Enablement in Power BI
- Report Selection and Configuration
- AI Training on FAQs and Key Metrics
- Demo Session with Stakeholders
- ROI and Adoption Recommendations

Critical Decisions We Help With

- Which reports and use cases benefit most from Copilot
- How to get more value out of Epic data and Fabric
- How to scale AI capabilities across the organization

Without governance and adoption, even the most advanced AI becomes unused technology

Ideation Process



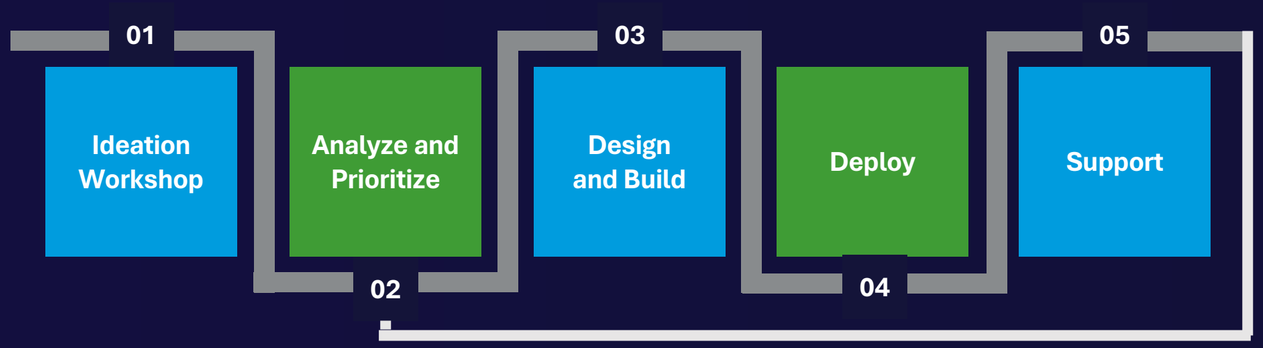
RSM and Azure: Innovate, Ideate and Deploy

AI solutions for health care powered by Microsoft Azure OpenAI GPT-4

From insight to impact with AI, analytics and automation

RSM's artificial intelligence ideation assessment helps health care leaders identify where AI and data innovation—powered by Microsoft Azure—can have the biggest impact. Through focused workshops, we engage your team to uncover key challenges and opportunities, then deliver a clear, prioritized roadmap of high-value use cases. We help you envision what's possible, rapidly prototype solutions and set the stage for responsible AI adoption that drives real results.

Our implementation process



AI use cases for health care

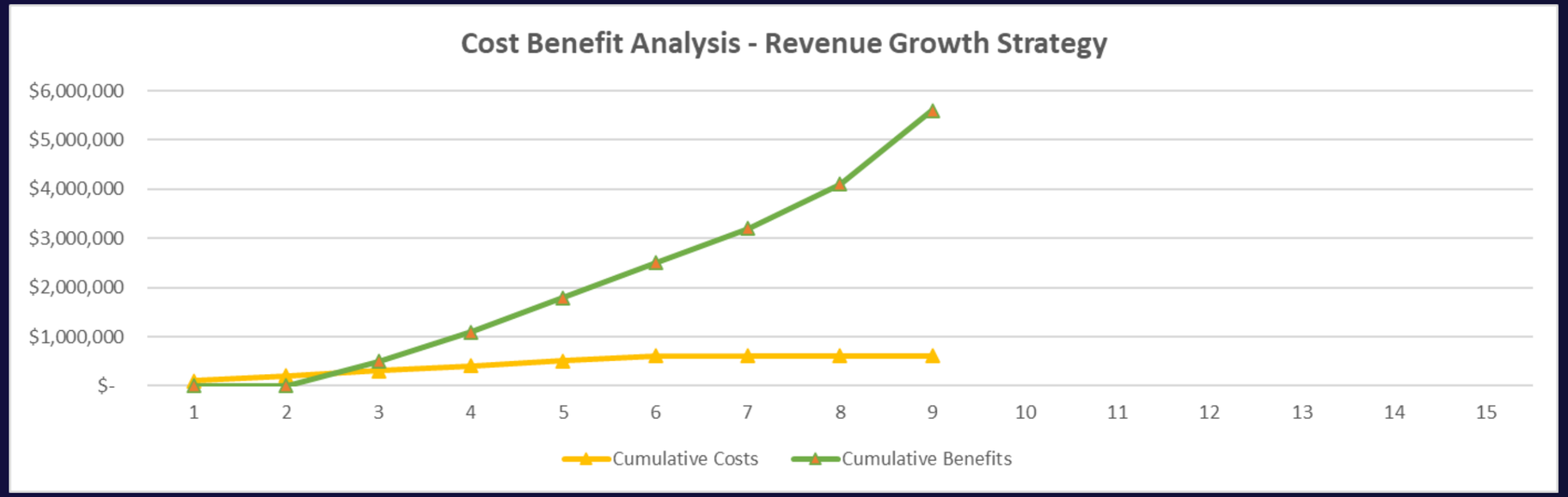
- Patient messaging automation
- Revenue cycle automation
- Data analysis and reporting
- Supply chain management
- Quality control and assurance
- Your unique use case

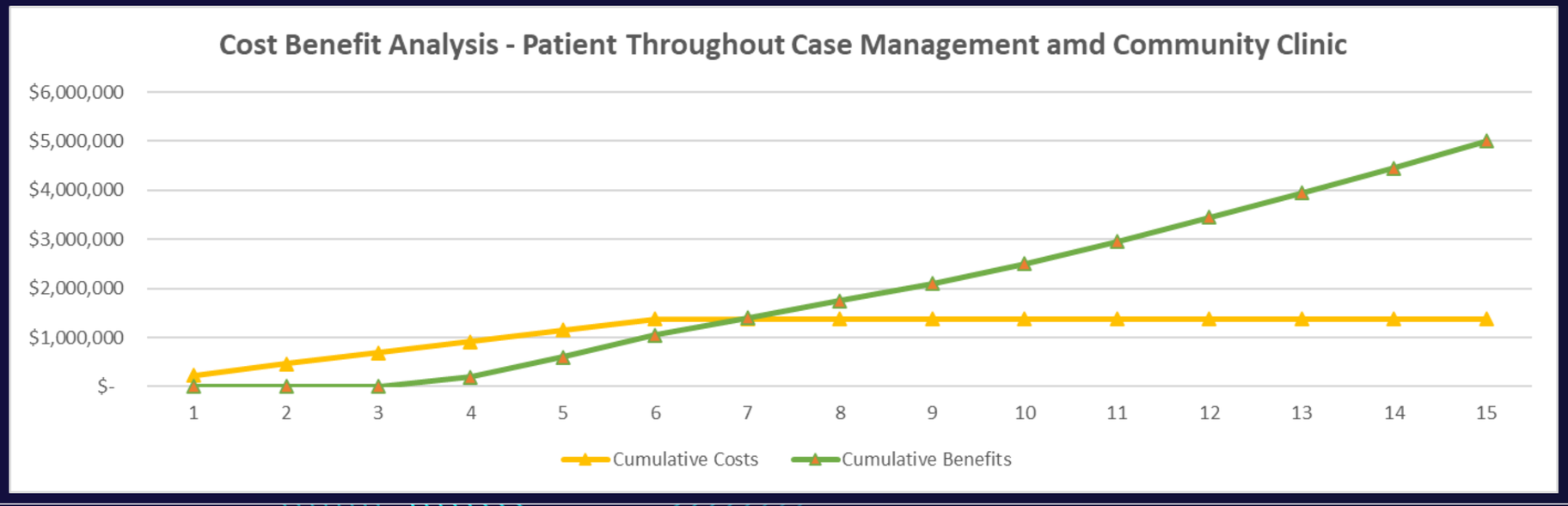
Why partner with RSM?

- **Integration with your existing technology:** No major platform overhauls required and minimal licensing costs
- **Proven three-to-one return on investment:** Delivering measurable impact and efficiency
- **Scalable foundation:** Accelerates future use case adoption

Microsoft Solutions Partner
Microsoft Cloud

Cost-Benefit Analysis (Sample)







Thank you

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Questions? Let's continue the conversation.