MARTY KOEPKE

# Between the Clicks

*The Hidden Work of Healthcare Informatics*

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# Contents

# Prologue

This book is for anyone who's just starting out in healthcare informatics profession (using the most general term "informaticist", in the career field of "informatics") —or anyone curious about what this field is really about. If you're feeling overwhelmed or unsure about how to take the next step, you're in the right place. I've been there. I know what it feels like to walk into a room and not know what you're supposed to do next.

I didn't start in this field with a grand plan. My journey was messy, full of unexpected opportunities and lessons learned the hard way. But every experience taught me something valuable. This book is built on those lessons—real-world stories, practical tips, and advice for growing your skills.

You won't find long-winded theory here. This book is about what works in real life. By the end, you'll know how to see the big picture, ask the right questions, and gain critical skills to help facilitate effective design solutions that actually make life easier for clinicians and patients.

You'll also explore the many roles you'll take on as an informaticist —**Observer, Translator, Facilitator, Advocate, Liaison, Designer, Change Manager, Student**. Each role will challenge you in different ways. Some days, you'll wear several hats at once. That's okay. You'll learn how to juggle them, just like I did.

Informatics is about solving real problems. It's about connecting the dots between clinical needs and technical solutions. It's about staying curious, learning from every experience, and leaning on others along the way.

This isn't just a job—it's a chance to make a difference. By the time you finish this book, its my hope you'll have the mindset, and confidence to do just that.

# Introduction

I never planned to work in healthcare. Honestly, it was just practical. I had two young kids at home, and working evenings and weekends at the hospital let me be with them during the day. My job as a unit clerk and monitor tech in the ICU was steady, flexible, and gave me a front-row seat to how things worked in healthcare. I didn't have a master plan back then. It was just a job that fit my life.

Over time, something shifted. I started to enjoy the rhythm of healthcare. I got curious—about how clinicians worked, how information flowed, and how all the moving parts of a healthcare organization. That curiosity pushed me to pursue my Master's in Healthcare Administration. It seemed like the next logical step, though I still didn't know exactly where it would lead.

Then came the opportunity that changed everything. The hospital was preparing for a major EHR upgrade, and I was asked to help document current state workflows. I didn't know what that even meant at first. I spent hours shadowing clinicians, trying to piece together how things actually worked. Soon, I was helping evaluate provider note templates and preparing them for the new system. I even got sent for EHR build training—a big step that felt like a leap into something unknown.

But life has its twists. The hospital underwent some changes, and it became clear I needed a new direction. When the CNIO suggested I look for a career in informatics, I laughed. Informatics? No way. That didn't sound like me at all. But then... I saw a job posting for an EHR analyst role. It paid a little more, and I figured I had enough experience to give

it a shot.

I wasn't looking for a career in informatics, but that's exactly what I found.

The first few months were overwhelming. I had to figure out how to design workflows, coordinate changes, build solutions, plan upgrades, and train staff. I knew just enough to get started, but the real learning came from mentors—providers and leaders—who invested their time in me. They taught me how to observe, think critically, approach problems with curiosity, and focus on what really matters: building solutions that improve patient care, and make their lives easier.

Every step in my journey was shaped by the people who came alongside me. Without them, I wouldn't have grown into each new role. Now, it's my turn to give back—to help the next generation of healthcare informatics professionals step into this world with confidence and curiosity, just like others helped me.

Let's get started.

# 1

# The Many Hats of the Informaticist

When I stepped into my first role as an EHR analyst, I assumed my job was to build and support the system. What I didn't realize was that healthcare informatics isn't just about technology—it's about people, workflows, and change. I wasn't just a builder or a troubleshooter. I became a problem-solver, facilitator, translator, teacher, and more.

Each task I took on introduced a new role. Observing workflows meant stepping into The Observer role—seeing the reality of clinical work beyond the system's design. Translating clinical needs into system requirements turned me into The Translator, ensuring IT could build solutions that made sense for users. When I started designing better workflows, I became The Designer, balancing usability, compliance, and efficiency.

Many people ask, "What does an informaticist actually do?" The answer is, a little bit of everything. We onboard new staff, manage EHR upgrades, handle requests, and integrate new technology into clinical workflows. But more than that, we move between roles based on the situation. One moment, you're a Liaison connecting teams. The next, you're a Change Manager helping people adopt a new process.

Informatics isn't a single role—it's the ability to wear the right hat at

the right time. Some days, you'll juggle multiple roles at once. That's the challenge—but it's also what makes this work exciting.

Let me introduce you to the key roles you'll take on in this field. Each will push you to grow in new ways, shaping you into an informaticist who can connect dots, solve problems, and build solutions that truly make a difference.

## The Observer: Seeing the Whole Picture Through Workflow Analysis

Observation is where informatics begins. Before you can fix a workflow or design a solution, you must first understand how things actually work—not just how they are supposed to work. That means watching, listening, and asking the right questions before jumping to conclusions.

When I first started, I assumed I could spot inefficiencies quickly. But real insights come when you step back, observe without interference, and look for patterns. A process might seem smooth on the surface, but the hidden problems are often in the extra steps, unnecessary clicks, or small frustrations that build up over time.

The best observers don't just document workflows—they trace data movement, analyze process gaps, and validate findings with users.

## The Translator: Bridging Clinical Needs and Technical Solutions

Once you've observed a workflow, your next role is to become a translator—bridging the gap between clinical needs and technical solutions. If no one connects these worlds, miscommunication leads to poor system design and frustrated users.

Being a translator isn't just about taking requests and passing them to IT. It's about digging deeper, asking the right questions, and ensuring

both sides truly understand each other. Early in my career, I assumed what providers asked for was exactly what they needed. I quickly learned that without deeper exploration, the solution rarely solves the real problem.

The best translators simplify complexity, remove jargon, and bring teams together.

## The Advocate: Prioritizing User-Friendly, Patient-Centered Designs While Being Compliance-Aware

One of the most important roles you'll take on as an informaticist is being an advocate. Your job isn't just to build what clinicians request or what IT says is possible—it's to champion solutions that enhance patient care, improve usability, and remain compliant with regulations.

Early in my career, I thought advocacy meant making things easier for clinicians. That's part of it, but it's only the beginning. True advocacy means seeing the bigger picture—understanding how workflows, documentation, and system design impact patient care, regulatory requirements, and long-term usability.

One of my biggest lessons came during an EHR integration project, where we were merging ambulatory and acute workflows into a single EHR. The acute-care documentation model wasn't designed for ambulatory clinics—if left unchanged, it would have slowed providers down, fragmented patient data, and disrupted continuity of care. It took persistent conversations and reframing the issue to help acute-care leaders see the impact from the ambulatory and patient perspective. Once they saw how the disconnects affected the patient journey, everything clicked.

Being an advocate means balancing innovation, usability, and compliance.

## The Facilitator: Leading Effective Meetings and Driving Decisions

Facilitating meetings might sound simple, but it's one of the most critical and challenging roles you'll take on as an informaticist. It's not just about running meetings or setting agendas—it's about guiding discussions, balancing perspectives, and ensuring clear decisions move projects forward.

At first, I thought facilitation meant leading every conversation and driving decisions. But I quickly learned that forcing a decision isn't the same as achieving consensus. Effective facilitation requires preparation, neutrality, and structured discussions to ensure that everyone's voice is heard while keeping the conversation on track.

A great facilitator creates space for collaboration, encourages engagement, and ensures meetings lead to real outcomes.

## The Liaison: Connecting Teams and Breaking Down Silos

Healthcare is full of silos—clinical teams focus on patient care, IT on system stability, operations on efficiency, and compliance on regulations. While they all work toward the same goal, their day-to-day priorities often conflict. That's where the liaison role comes in.

As a liaison, your job is to bridge these gaps, ensure teams communicate effectively, and prevent costly misalignment. I learned just how critical this role was during a referral management project across multiple healthcare markets. Each market had a different referral process—some centralized, others decentralized. My task wasn't just to build a solution; it was to bring all stakeholders together, find common ground, and ensure that the final workflow worked across the organization.

The key to being an effective liaison is building relationships and trust.

When teams trust you, they are more open to collaboration, and aligning perspectives becomes easier. Sometimes, the most valuable thing you can do is remind teams why they're working together and keep the big picture in focus.

## The Designer: Building Practical, Real-World Solutions

Designing solutions is where everything starts to come together. After observing workflows and translating needs, it's time to create something that works in real life—not just in theory.

Healthcare informatics isn't about building the most advanced or technically impressive system—it's about creating solutions that clinicians can actually use. A well-designed solution fits naturally into workflows, improves efficiency, and enhances patient care without unnecessary complexity.

I've learned to start with the basics. Keep the design simple, test it, and iterate before adding layers of complexity. Think of it like building a house—you lay a strong foundation before adding walls and a roof. The best solutions aren't created in isolation—they come from collaboration, testing, and refinement. No design is perfect the first time, and less is often more when it comes to usability.

## The Change Manager: Managing Change and User Adoption

Informatics is full of ideas, complaints, and requests for change. Some come from frontline staff seeking efficiency, others from regulatory mandates or leadership initiatives. But one of the biggest lessons I've learned is that not every request should move forward—change must be evaluated, prioritized, and structured before implementation.

This is where governance comes in.

Good governance isn't just a formality—it's a safeguard. It ensures

that changes are necessary, well-designed, and aligned with strategic priorities. Governance starts long before a formal review, in the pre-governance phase, when we define the problem, seek leadership sponsorship, and determine whether a request is even needed.

Not every issue requires a system build, and not every request is a priority. Leadership plays a key role in deciding what aligns with broader goals and how it fits with other projects.

Once a request is validated and designed, it should never be pushed to build without structured review and approval. Poorly vetted changes can disrupt workflows, introduce compliance risks, and create more problems than they solve.

As an informaticist, you're not the decision-maker, but you are a steward of the change process. You help guide governance, engage the right people, and ensure changes move forward the right way.

## The Student: Embracing Continuous Learning and Adaptability

Informatics is constantly evolving. New technologies, workflows, and challenges will push you to keep learning and adapting. You'll never have all the answers, and that's okay. What matters is that you stay curious, ask the right questions, and keep growing.

Early in my career, I assumed that experience would eventually lead to mastery—that if I learned enough, I'd eventually know everything I needed to succeed. But over time, I realized that the best health informatics professionals aren't the ones who have all the answers—they're the ones who keep asking questions.

Some of the biggest mistakes in informatics happen when people assume they already know the right answer. The way something worked last year may not be how it works today. A system upgrade, a regulatory change, or a workflow shift can introduce unexpected challenges. The

only way to stay ahead is to approach every situation with fresh eyes.

Being a student means getting comfortable with not knowing everything. It means shadowing roles you've never done, sitting in on meetings you don't fully understand, and always being willing to ask, "Why?"

## Bringing It All Together

Informatics is about wearing many hats and knowing when to switch between them. Some days, you'll be an observer, watching workflows unfold and identifying gaps. Other days, you'll be deep in design, building a practical solution, or guiding a team through change. No two days will be the same, and that's what makes this work so rewarding.

These roles aren't just things you'll do—they'll shape who you become as a professional. They'll challenge you, push you, and teach you how to think bigger and collaborate better.

In the chapters that follow, we'll dive deeper into each role, giving you the tools and practical steps you need to grow in each one. This isn't about being perfect from the start. It's about learning, adapting, and becoming the kind of informaticist who can make a real difference.

Let's begin.

# 2

# The Observer—Seeing the Whole Picture

The first role you'll take on as an informaticist is that of The Observer. Observation is where everything begins. You can't improve a workflow, design a solution, or make a system better unless you fully understand how things work right now. That means watching, listening, and asking the right questions—not jumping to conclusions or rushing to fix things. Observation is about seeing the whole picture, and it lays the foundation for everything that follows.

In my early days, I didn't even realize I was playing this role. My first taste of informatics was helping document current state workflows during an EHR upgrade at the hospital. I was asked to shadow providers, nurses, and unit coordinators, capturing how they worked and documenting every step. The real work began, however, when I became an analyst. That's when I realized that observation isn't passive—it's an active process.

At first, I thought my job was just to watch and take notes, but that only got me so far. The real insights came when I started asking questions:

- Why are you doing it that way?
- Why in that order?

- What's slowing you down, and what do you do to work around it?

Those questions opened doors. The more I asked, the more I saw how things fit together—or didn't. Each session left me with a new set of questions:

- Is there a better way to do this?
- Could this step be simpler?
- Why isn't the system supporting this process better?

I would take those questions back with me and practice on my own, testing workflows, experimenting with new ideas, and trying to connect the dots. That combination of curiosity, analysis, and hands-on practice taught me more than any formal training ever could.

## Where I Struggled

When I first started observing workflows, I struggled to balance watching and acting. I felt pressure to offer quick solutions, but that often led to assumptions or missed details. I'd notice something that seemed like a problem and jump in to "fix" it, only to realize later that I hadn't seen the full picture.

It was also awkward to just stand there, especially when clinicians were busy. I worried I was getting in the way. The more uncomfortable I felt, the more tempted I was to rush through the observation.

## What I Learned

### *Slow Down and Observe Fully:*

I learned to resist the urge to offer solutions right away. Taking time to see the whole workflow helped me avoid mistakes and find deeper insights.

### *Ask Open-Ended Questions:*

Instead of asking yes/no questions, I started asking broader questions like "What's the most frustrating part of this workflow?" or "What would make this process easier?" These questions led to richer answers and new perspectives.

### *Embrace the Awkwardness:*

Over time, I realized that standing quietly and observing was part of the job. Once I explained why I was there, most clinicians were happy to let me watch and even pointed out things I might have missed.

## Observation is Active, Not Passive

Sometimes, the real problems hide in plain sight. It might be something small—a nurse taking extra steps to grab a supply or a provider needing to click through multiple screens just to complete a basic task. These small inefficiencies might seem harmless, but they add up quickly. If you're not paying attention, you'll miss them.

Being an observer is an active, intentional process. You have to stay curious and keep asking questions, even when it feels uncomfortable. The key isn't just documenting every step of a workflow—it's understanding the story behind each step. Why does this process exist? How did it evolve? What purpose does each action serve, and could it be done

differently?

One of the most valuable skills you'll develop is the ability to ask deeper, more meaningful questions:

- When does this process break down? Why?
- What's the workaround, and why did it become necessary?
- How does this process change depending on the setting or situation?

It took me a while, but I finally learned that silence is powerful. When you ask a question, give people time to think and respond. The pause might feel awkward, but trust me—that's often when the most honest and valuable answers come out. If you jump in too quickly with ideas or solutions, you'll miss the deeper insights hiding beneath the surface.

## Seeing Patterns and Gaps

The more you observe, the more patterns will start to emerge. You'll notice what's working, where things slow down, and where workflows fall apart. Informatics is all about finding those gaps and connecting the dots.

Sometimes, the solution is simple—combining two steps into one, or leveraging an available filter. Other times, it's more complex, requiring a full redesign of the process. Either way, your job as an observer is to bring those gaps to the surface and understand why they exist.

I remember a project where I was asked to help map out the workflow for health maintenance. At first, it seemed like a straightforward process: Go to the health maintenance module, and document the screening measure that was completed. Indicate when it is next due. Easy peasy, right? Not so much! It turns out that each clinical quality measure has unique nuances. The module didn't account for these things. Every step was manual, and it took staff so long to update everything, it wasn't

used reliably. In order to work, it had to be optimized.

Taking the time to first listen to the user's needs and then compare that against their actual technology experience is one of the most powerful things you can do as an observer. It's not just about what's happening in front of you—it's about following the data.

Ask yourself:

- Where does the information come from?
- Where does the information go after this step?
- Does it reach the right person or system?
- What manual steps are required along the way?
- Where are their gaps between what the users need and what the technology does?

These small details matter. They're the difference between a seamless process and a broken one.

## Collaboration is Key

Observation doesn't end with you. Once you've mapped out what's happening, take your observations back to the people living the workflow every day. Walk them through what you've seen and ask if it matches their experience. This feedback loop is critical.

In one project, I mapped out a clinic's patient intake process and thought I had nailed it. But when I brought it back to the back office staff, they pointed out steps I hadn't noticed—steps that made all the difference. The best insights come from collaboration. Always validate your observations with the people who know the process best.

## The Foundation for Every Other Role

Being an observer isn't just the first role you'll take on—it's the foundation for every other role you'll play as an informaticist. Every great design starts with great observation. Every successful change begins with fully understanding what needs to be changed.

When you take the time to truly see the full picture, you set yourself up for success in every role that follows—whether you're translating needs, designing solutions, managing change, or advocating for better workflows.

In the next chapter, we'll dive into the Translator role—where observation meets action. This is where you'll learn how to take everything you've seen and turn it into something that both technical and clinical teams can actually leverage.

Let's keep going.

## Practical Tips

### *Focus on transitions:*

- Most workflow issues happen when information passes from one person or system to another.

### *Trace the data:*

- Following the flow of information through the system is just as important as observing physical workflows.

*Involve clinicians early:*

- Reviewing your findings with them helps validate your observations and builds trust.