

RE-2 Employee Post Travel Disclosure of Travel Expenses

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Post Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building. This form is a public disclosure. The form and all attachments will be made publicly available.

Certification: In compliance with the Regulations Governing Privately Sponsored Travel, Senate Rule 35, and the Honest Leadership and Open Government Act of 2007, I certify that I accepted the following gift of privately sponsored travel:

Private Sponsor(s):
Epic Systems

Travel Dates:
08/21/2023 to 08/23/2023

Name of accompanying family member (if any):

Relationship to Traveler:

Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
\$515.09	\$264.50	\$30.00	\$925.00

I also certify that attached to this form are all required documents for post travel disclosure, including:

- The final Employee Pre-Travel Authorization (Form RE-1)
- The final Private Sponsor Travel Certification Form with all attachments
- The final invitation
- The final approved itinerary

Finally, I certify that all trip information reflected in the attachments above accurately reflects the travel that I accepted. If there were any changes to the trip after I received approval from the Committee, the changes are described in ATTACHMENT 1.

9/14/23

Date

Matthew Thomas

Printed Name of Traveler

Signature of Traveler

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER

I have made a determination that the expenses set out above in connections with travel described in the Employee Pre-Travel Authorization form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

9/19/2023

Date

B. J. Sanders

Signature of Supervising Senator/Officer

ATTACHMENT 1 – CHANGES FROM APPROVED PRE-TRAVEL

Note: Material changes to a trip that occur after the Committee has issued an approval letter may invalidate the Committee's approval. Please contact the Committee with any questions regarding changes to an approved trip.

Were there any changes to the pre-approved travel expenses? (Transportation, Meals, Lodging, Other)?

☒ Yes ☐ No

Expense Change	Revised Amount	Explanation
Lodging	\$264.50	Hotel room was less than estimated.
Transportation	\$515.09	Flights were less than estimated.
Meals	\$30.00	Attendees departed before dinner was served.

Were there any changes to the pre-approved itinerary?

☒ Yes ☐ No

Explanation: The attendees joined different breakout sessions in the afternoon. They joined an extended session on AI in healthcare. They also informally met with Micky Tripathi, ONC Coordinator after the AI session to discuss health IT policy issues. No Epic staff participated in this discussion.

Were there any additional changes to the pre-approved trip?

☐ Yes ☒ No

Explanation: There were no additional changes to the pre-approved trip.

RE-1 Employee Pre-Travel Authorization

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will not be considered or approved.

Date/Time Stamp

Name of Traveler:

Matthew Thomas

Employing Office/Committee:

Senate HELP Committee

Private Sponsor(s):

Epic Systems

Destination(s):

Madison, WI

Travel Dates:

8/21/23-8/22/23

NOTE: If you plan to extend the trip for any reason you must notify the Committee.

Explain how this trip is specifically connected to the traveler's official or representational duties.

Will use this trip to learn more about how Epic is engaging in health data interoperability and will meet with stakeholders to better understand current challenges to data sharing and potential legislative solutions.

Do you have an accompanying family member or spouse on this trip? Name and Relationship to Traveler:

☐

(signify "yes" by checking box)

I certify that the information contained in this form is true, complete and correct to the best of my knowledge.

7/26/23

Date

Signature of Employee

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER

(President of the Senate, Secretary of the Senate, Sergeant at Arms,
Secretary for the Majority, Secretary for the Minority, and Chaplain)

Senator Bernard Sanders

hereby authorize

Matthew Thomas

(Print Senator's/Officer's Name)

(Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate.

☐

(signify "yes" by checking box)

7/26/23

Date

B. Sanders

Signature of Supervising Senator/Officer

Epic Systems: Epic August Trip to Madison

 Matthew Thomas

Title:

None

Employing Office/Committee:

HEALTH, EDUC, LAB, AND PENSIONS - REP

Duty Station:

WASHINGTON, DC

Destination(s):

Madison, Wisconsin

Explain how this trip is specifically connected to the traveler's official or representational duties:

Will use this trip to learn more about how Epic is engaging in health data interoperability and will meet with stakeholders to better understand current challenges to data sharing and potential legislative solutions.

Name of accompanying family member (if any):

Not Entered

Name and Relationship to Traveler:

None

Organization Information

Organization Name

Epic Systems

Is your organization classified as a §501(c)(3)?

☐ Yes

☒ No

§501(c)(3) Organization Type

None

Address

1979 Milky Way

Address 2 (Optional)

None

City, State Zip

Verona, Wisconsin 53593 United States

Phone Number

608 271 9000

Organization URL

www.epic.com

History of Congressional Travel

This is our first sponsorship of congressional travel.

Educational Activities

Our primary business is developing health IT software, and our educational mission is to explain how health IT software works in real world implementation. We work to educate policy makers on the opportunities for health IT to improve care and reduce costs. We organize and hold one of the preeminent health IT conferences in the country each year, in which more than 9,000 people from 500 organizations attend. At the conference we discuss new software that is being launched and how to improve utilization of current software. As part of that we explain how the software can achieve government objectives.

Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status: *I certify that the sponsor is not a federally registered lobbyist but retain or employ one or more federally registered lobbyists.*

Foreign Agent Registration Status: *I certify that the sponsor is not an agent of a foreign principal and do not retain or employ an agent of a foreign principal.*

Foreign Government Involvement

Foreign Agent Registration Status:

- ☒ I certify that the sponsor is not a foreign government.
- ☒ I certify that the sponsor is not an entity that is owned or operated by a foreign government.
- ☒ I certify that the sponsor does not receive funding from a foreign government.

Comments

None Entered

Signature Page

The signature page is below.

Purpose and Details

Provide a brief description of the trip.

This trip would be to Epic's annual Users Group Meeting, which is one of the preeminent health IT conferences in the Country. The meeting consists of breakout meetings where health systems using Epic present new and innovative use of the software. The primary presenters at these breakout sessions are health system users from across the Country. We also have a central session where we discuss new software to come. A major focus of this conference will be AI in healthcare.

Explain how the purpose of the trip relates to your organization's mission.

This event is a unique gathering of experts in health IT from across the country in one place. Having congressional staff attend the conference allows them to hear directly from the users of health IT software how government policies are being implemented in the real world.

Is your organization the only sponsor for this trip?

☒ Yes ☐ No

Grantmaking Organizations (Optional)

There are no grantmaking organizations.

With or Without Regard for Congressional Participation

The trip is arranged or organized without regard to congressional participation.

Lobbyist/Foreign Agent Involvement in Planning, Organizing, Requesting or Arranging

- ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal, other than de minimis involvement.

Lobbyist/Foreign Agent Financing

- ☒ The trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- ☒ No funds or in-kind contributions were earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.

Lobbyist/Foreign Agent Accompaniment

Complete if all sponsors are §501(c)(3) organizations

- ☐ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip

Complete if any of the sponsors is not a §501(c)(3) organizations.

- ☐ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- ☒ The trip is limited to a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip

Certification of No Recreational Activity and No Alcohol

- ☒ Travel expenses paid for will not include expenditures for recreational activities.
- ☒ Travel expenses paid for will not include expenditures for alcohol, except as permitted by the Regulations Governing Privately Sponsored Travel.

Invitees

i Members and staff from the House of Representatives **will not** receive invitations.

The list of invitees is below.

Travel Details

Trip Start Date/Time:
08/21/2023 @ 04:40 PM



Trip End Date/Time:
08/22/2023 @ 09:54 PM

Will the traveler be accompanied by a family member for whom the sponsor will pay travel expenses?

☐ Yes ☒ No

Itinerary

The itinerary is below.

Transportation (Per Member/Officer/Employee: \$565.00 | Accompanying Family Member: \$0.00)

Transportation Type	Class	Amount
Airfare	Coach	\$500.00
Note round trip flight		
Ground Transportation	N/A	\$65.00
Note Cost of shuttle from hotel to UGM and from UGM to Madison airport.		

Lodging (Per Member/Officer/Employee: \$320.00)

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
08/21/2023	08/22/2023	Sheraton Madison Hotel	Madison	Wisconsin	United States	1	\$320.00	Yes
Cost Exceeds Per Diem Reason Epic's User Group Meeting brings an influx of travelers to Madison and prices are more expensive during this time.								

Meals (Per Member/Officer/Employee: \$59.00)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
08/22/2023	\$14.00	\$16.00	\$29.00	\$0.00	\$59.00	Madison	Wisconsin	United States	No

Reasonable Miscellaneous Expenses (Per Member/Officer/Employee: \$925.00)

Expense Type	Amount	Notes
Conference Fees	\$925.00	standard registration

Additional Attachments

Document Name
There are no additional attachments.

Invitees List

Aliza Silver, Deputy Director of Health Policy for Senate Health, Education, Labor and Pensions Committee

Matthew Thomas, Health Policy Adviser for Senate Health, Education, Labor and Pensions Committee

Thomas, Matthew (HELP Committee)

From: Katie Lee <kalee@epic.com>
Sent: Wednesday, June 28, 2023 10:17 PM
To: Thomas, Matthew (HELP Committee)
Subject: Invitation to Epic's UGM 2023

Hi Matthew,

You are invited to these events at **UGM 2023** - Epic's annual Users Group Meeting – themed *Castaway*.

Check out the [UGM website](#) for more details, and a look at what is happening each day.

Monday, August 21:

- UGM Peer-to-Peer Sessions – 1:30-5:10pm

Tuesday, August 22:

- Plenary: The Executive Address & Cool Stuff Ahead – 8:30am- Noon
- UGM Peer-to-Peer Sessions – 12:30-5:10pm
- UGM Dinner – 5:10 - 8pm

Wednesday, August 23:

- Peer-to-Peer Sessions – 8:30am - 4:10pm

Use this [UGM23 Guest Registration](#) link. There's no need to check the "I am a consultant/vendor" checkbox. That is not applicable for you. As our invited guest, your registration at UGM is complimentary. Enter the code: **UGM23Comp** in the special registration codes box.

Hope to see you in August!

Katie Lee



Epic User Group Meeting Itinerary**August 21st**

3:40pm ET Depart from DCA on DL 5607
5:04pm CT Arrive at MSN

August 22nd

- 7:30-8:30am CT Breakfast & Networking
- This is an opportunity to grab breakfast food provided by Epic while chatting with other attendees. Attendees do not need to be present for the full hour.
- 8:30am-12:00pm CT Executive Address & Cool Stuff Ahead
- Gather with fellow attendees for a trek through the year's progress, including novel accomplishments from the Epic community. Learn how others are navigating rocky waters – creatively using the tools they already have and finding low-hanging opportunities for automation, patient self-service, and clinical user happiness. Hear from Epic leaders and get their R&D vision for the near and far future.
 - Speakers: Judy Faulkner
- 12:45-2:25pm CT Cool Stuff Breakout: Patient Experience & Telehealth
- Hear from Epic software developers, user experience designers, and technical services team members about how MyChart, telemedicine, patient-provider messaging and other Epic tools can help improve the patient's clinical and financial experience.
 - Speaker: Alex Brizius, Ben Heiligenthal, Ben Young, Brian Van Wyk, Dana Close, Eric Cooper, Ethan Butt, Hannah Smith, Josh Taranto, Kevin Durand, Mike Epley, Nick Koxlien, Ru Okamoto, Spencer Eanes, Taylor Seale, Trevor Berceau
- 1:45-2:25pm CT Cool Stuff Breakout: Care Everywhere
- Care Everywhere software developers and interoperability implementation support talk through interoperability and Care Everywhere, which connects Epic customers seamlessly.
 - Speakers: Ben Alexander, Emma Rupnow, Matt Doyle
- 2:45-3:25pm CT Cool Stuff Breakout: Clinical Decision Support
- EpicCare-Informatics Development Software Developers will discuss the clinical decision support tools offered by Epic.

- Speakers: Cory Melin, James Doyle

5:50pm CT

Depart from MSN on DL 5607

8:54pm ET

Arrive at DCA