

HRSA Health Information Technology and Quality Webinar

“Health IT Project Management 101: How to Avoid Failure”

Date: 6/22/2012

**US Department of Health and Human Services
Health Resources and Services Administration**

Office of Health Information Technology and Quality

Additional HRSA Health IT and Quality Toolboxes and Resources including past webinars can be found at:

<http://www.hrsa.gov/healthit>

<http://www.hrsa.gov/quality>

Additional questions can sent to the following e-mail address:

HealthIT@hrsa.gov

- US Department of Health and Human Services
- Health Resources and Services Administration

Upcoming HRSA Health IT and Quality Announcements

- HIMSS Jobmine for Safety Net Providers (Free Job Postings for HRSA Grantees and Safety Net Providers). Email hfigge@himss.org for more information.
- Competency Exam for Health IT Professionals , vouchers available for free exams, email healthit@hrsa.gov
- Next HRSA Health IT and Quality Webinar “Using Data for Evidenced Based Quality Improvement” Friday, July 20, 2PM (ET) –Registration is Open
- HRSA’s June/July Health IT and Quality Newsletter Available Now Online
 - Features Include:
 - Two New Health IT and Quality Grantee Spotlights Include:
 - “Improving Reimbursement Through Effective Use of a Cloud Based Practice Management System” Featuring University of Michigan’s Regional Alliance for Healthy Schools
 - “Using a Patient Advisory Council for Engaging Patients in their Healthcare” Featuring International Community Health Service
 - New papers on Quality Improvement from the Bureau of Primary Healthcare
 - HRSA Authors Featured The American Journal of Preventive Medicine and the American Journal of Public Health Special Issue on Integrating Primary Care and Public Health
 - New HRSA “Network Guide” is now available on the HRSA Health IT website
 - Association for Clinicians for the Underserved is Calling for Abstracts for their 2013 Annual Conference March 7-8 ,2013 in Poughkeepsie NY

Introduction

Presenters:

- Anita Griner-Centers for Medicare and Medicaid Services
- Amy Cooper-OCHIN
- Karrie Ingram-Citizens Memorial Hospital

Applied Project Management: Neither Magic Nor Mystery



Anita Griner, MBA, PMP®

Director, Innovation Center PMO
Centers for Medicare & Medicaid Services



About Us: CMS' Center for Medicare & Medicaid Innovation

Identify, Test, Evaluate and Scale New Models

“The purpose of the Center is to test innovative payment and service delivery models to reduce program expenditures under Medicare, Medicaid, and CHIP...while preserving or enhancing the quality of care furnished.”

- **Opportunity to “scale up”:** The HHS Secretary has the authority to expand successful models to the national level
- **Resources:** \$10 billion funding for FY2011 through 2019

We all start out with the best of intentions.....



- Step 1: Have a plan
- Step 2: Follow the plan
- Step 3: There is no step 3 because the plan always works out perfectly..... right?

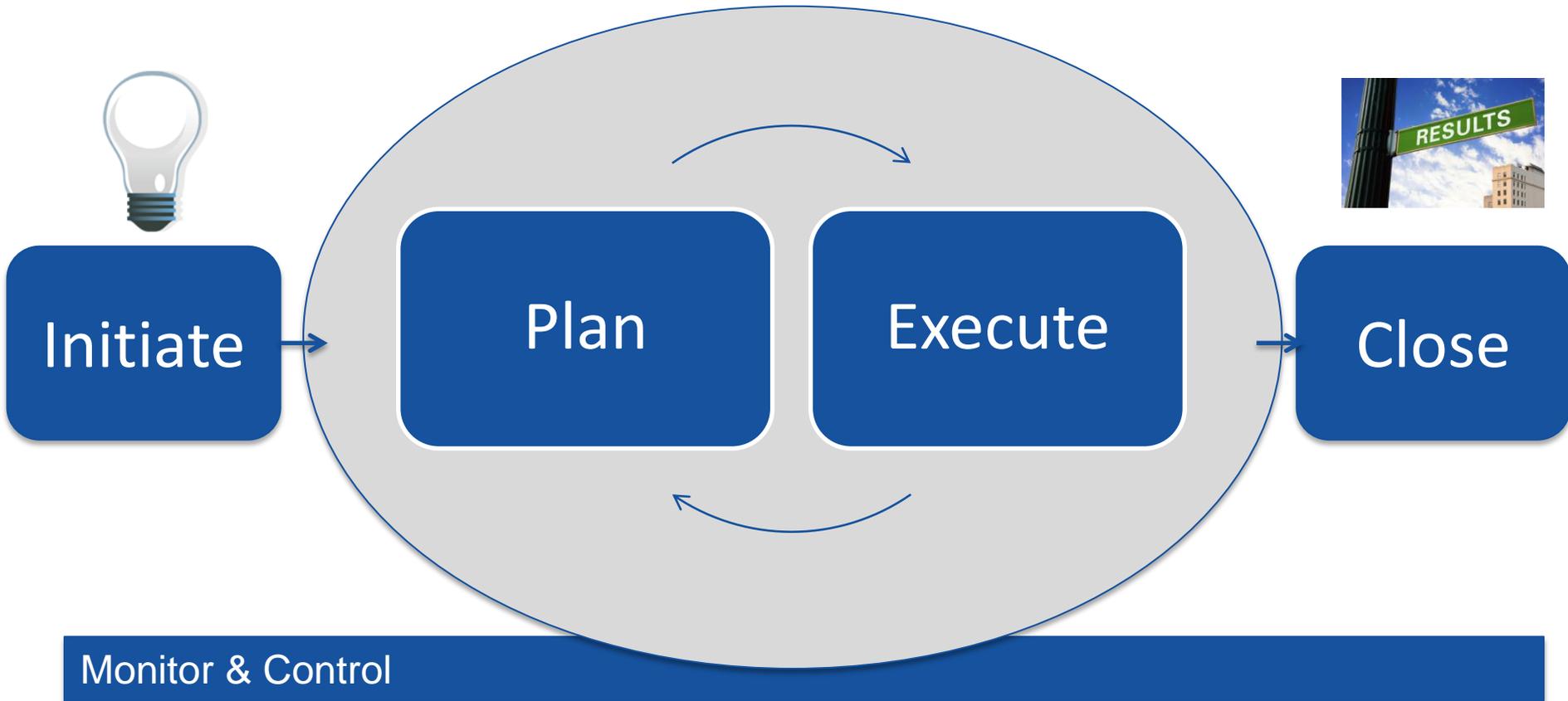
The purpose of project management is to *increase the likelihood* of success.

Foundation Based on Cycles of Continuous Improvement

- Project management practices are rooted in cycles of planning, executing, tracking against the plan and making managed changes to re-align with the plan.
- Continuous cycles and deliberate management of change.



Project Lifecycle



A Project Defined

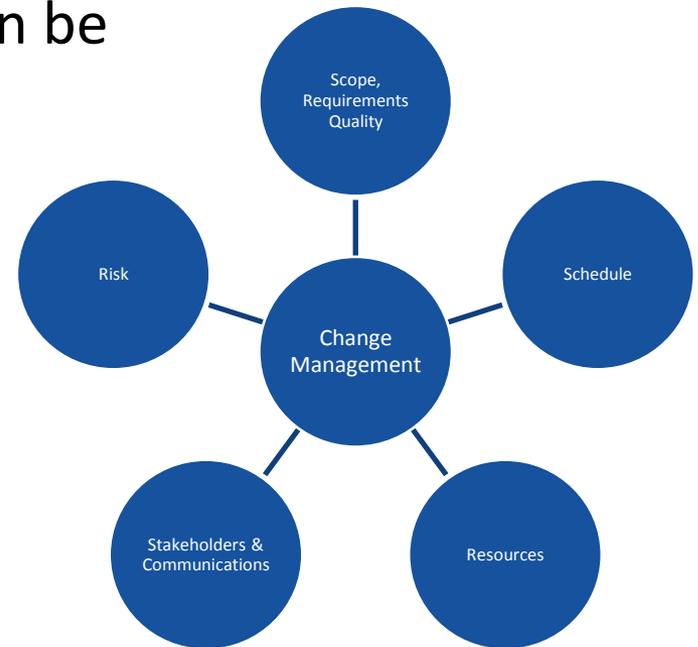
- Projects come in many shapes and sizes but must have two traits by definition:
 - **Temporary** with a defined beginning and end
 - Produces something **unique**, not an assembly line repetitive production
- **“The What” (Scope):** There are expectations about what outcomes the project is expected to produce, what quality standards it must meet
- **“The When” (Time):** The temporary nature of a project means that it has a set amount of time within which to produce its outcomes (products, services or results)
- **“The How” (Resources):** The methods and means by which the project achieves outcomes (people, \$\$, things)



The uniqueness of a project introduces uncertainty and risk

Project Management Domains

- There are processes, tools and techniques to help manage the project which can be organized into domains **such as:*
 - Scope, Requirements & Quality
 - Schedule
 - Resources: Human Resources, Budget, Procurements
 - Stakeholders & Communications
 - Risks
- Each domain should be planned and executed with appropriate adjustments and changes managed



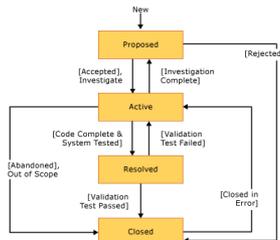
**Not all inclusive*

Planning & Managing Change

Change is inevitable on any project. The key is to have a plan and process for how to manage changes and incorporate approved changes into the plans.



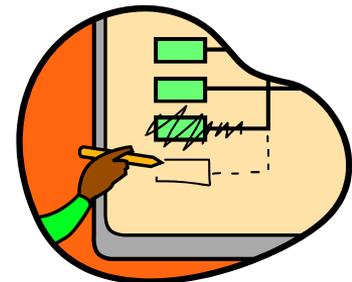
What is the plan for managing changes to scope, schedule, budget etc.



Track all the plans and identify needed changes

Request Type	Request Number	User Email
Change	12345	john.doe@company.com
Requested By	Requested Date	Requested By Position
Requested By	Requested Date	Requested By Telephone
Requested By	Requested Date	Requested By
Requested By	Requested Date	Requested By
Requested By	Requested Date	Requested By
Requested By	Requested Date	Requested By
Requested By	Requested Date	Requested By
Requested By	Requested Date	Requested By
Requested By	Requested Date	Requested By

Manage changes through a change management process



Scope, Requirements & Quality

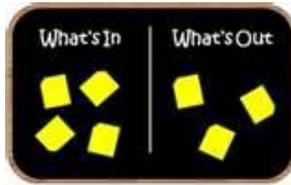
It is crucial to clearly understand what the project intends to produce, have a clear scope, and manage conformance to the requirements to achieve quality.



How are we going to manage scope and quality?



What is this project intending to produce?



What requirements do we have for the outcomes to meet?

Item ID	Item Description	Priority	Dependencies	Responsible Party	Status
4.3	USE CASE - UC_XXX_YYYY	High	None	Project Manager	In Progress
4.3.1	UC_XXX_YYYY - User Authentication	Medium	4.3.2	System Analyst	Completed
4.3.2	UC_XXX_YYYY - Data Entry	High	4.3.1	System Analyst	In Progress
4.3.3	UC_XXX_YYYY - Reporting	Low	4.3.2	System Analyst	Not Started

What are all the parts that make up the project scope?

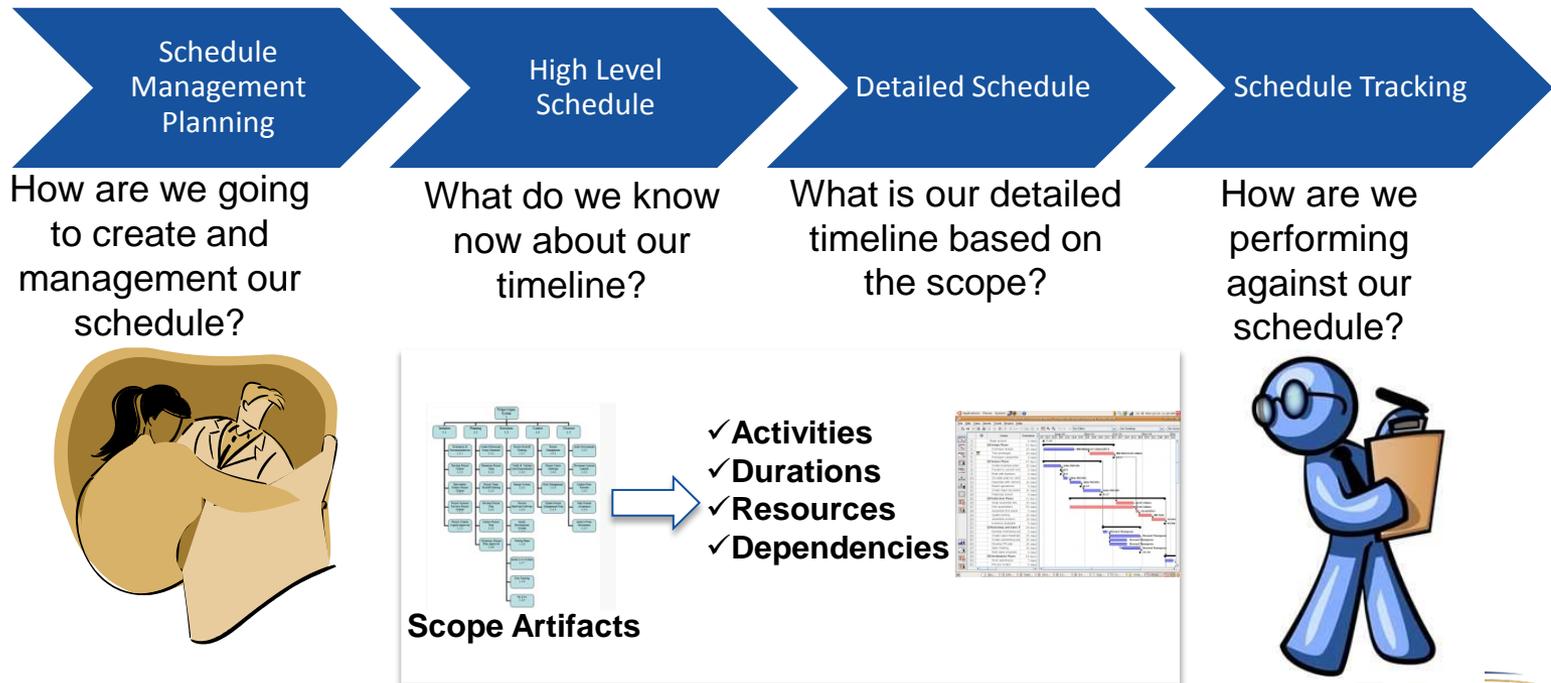


How will we know that we met our requirements and scope?



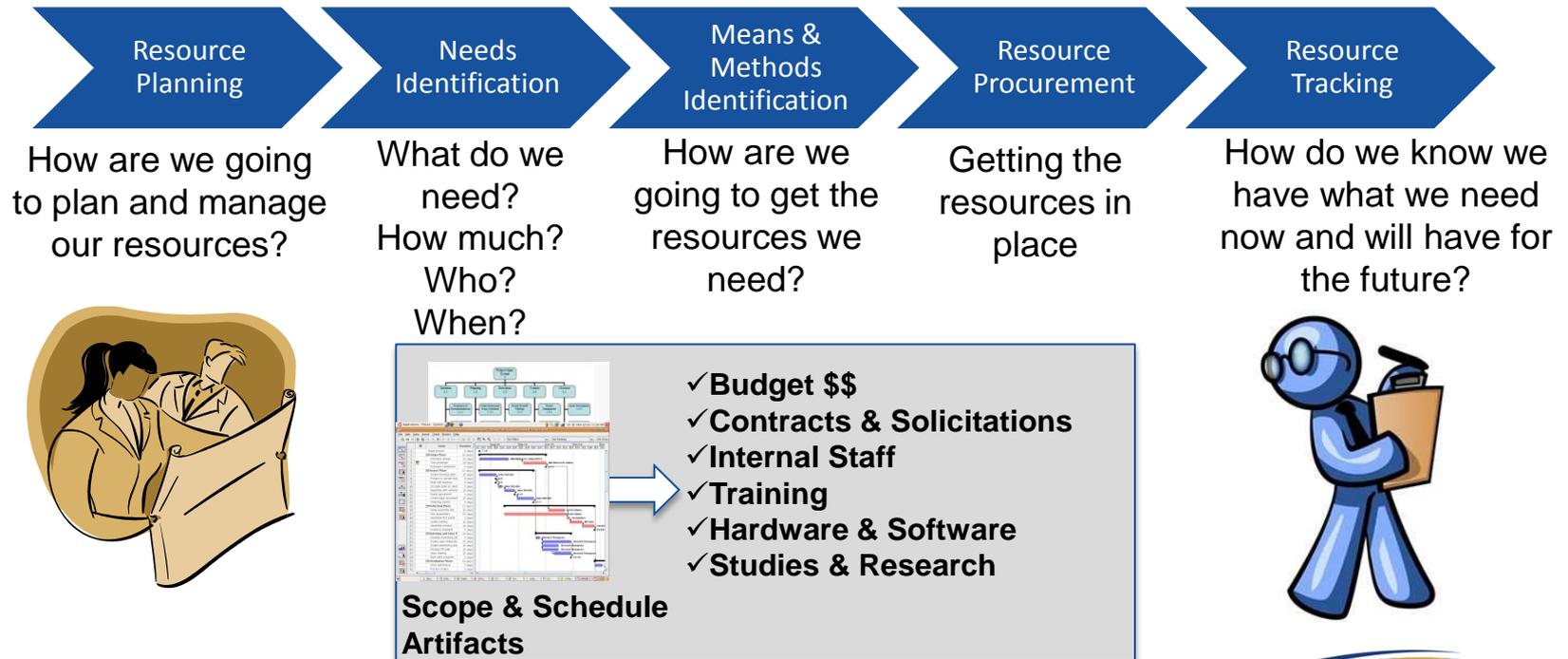
Schedule Management

All projects are temporary and must have, and manage, to a defined schedule. Schedule slippage without proper change control can drain resources and impact quality.



Resource Management

Projects consume resources to achieve progress. Resources take many forms such as human, technology and tools, materials etc. They can be obtained through expense of funding/budget and procurements.

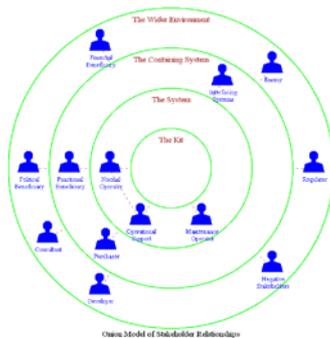


Stakeholders & Communications

Stakeholders are anyone who has an interest in, or can have an impact on, the project. How the project will communicate within the team and across all stakeholders is critical to ensure appropriate communications are in place.

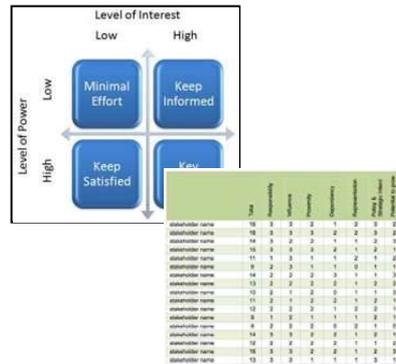
Stakeholder Identification

Who are our stakeholders?



Stakeholder Analysis

What is their interest & impact to our project?
What do they need to know?



Communications Strategy & Planning

What are our communications needs? What will we communicate, when and how?

Stakeholder	Information	Frequency	Communication Method	Format
Steering Committee	High level information, issue escalation only, funding requests, schedule changes, accomplishments, plans, decisions	Monthly	Formal Meeting	Powerpoint, pre-read 2 days before the meeting
Manager - IT	Resourcing, technology issues, progress (operational/tactical level)	Weekly or as needed	Formal Meeting or email	Formal meeting agenda or adhoc
Manager - Business	Business requirements signoff, baseline changes, resourcing, progress	Weekly or as needed	Formal Meeting or email	Formal meeting agenda or adhoc
Project Team	Progress, issues, risks, schedule, plans, solution approach	Weekly or as needed	Formal Meeting	Formal meeting agenda or adhoc

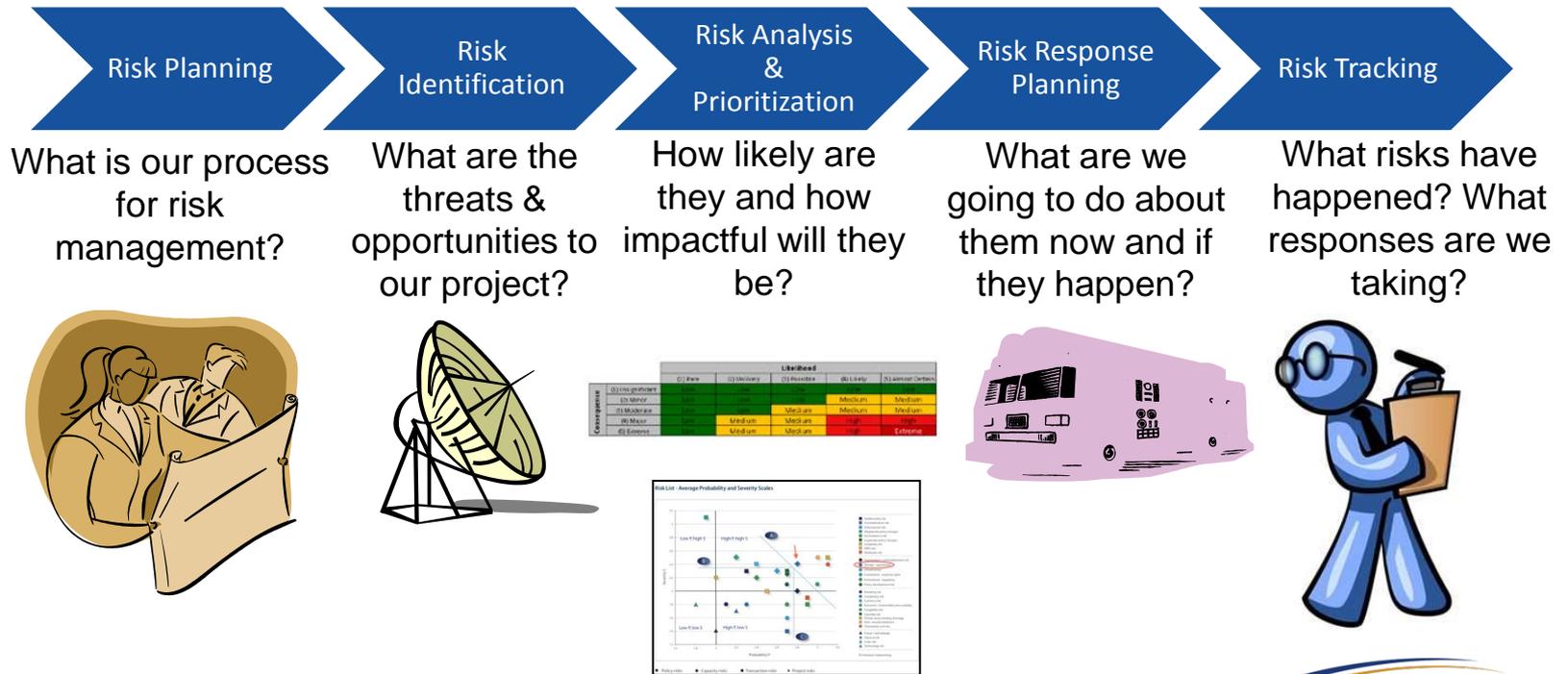
Communications Execution & Monitoring

Are communications occurring per the plan? Are they effective?



Risk Management

Projects, through their temporary and unique nature, inspire uncertainty. There are both risks which are threats which may negatively impact the project but also opportunities which may positively impact the project. Manage both.



Project management can help those good intentions become reality.....



- Step 1: Have a plan
- Step 2: Follow the plan
- Step 3: Track against the plan
- Step 4: Revise the plan



-REPEAT-

Project management alone is not a 100% guarantee of project success but it will create the opportunity.

Find out more....

- Centers for Medicare & Medicaid Services
 - www.cms.gov
- CMS' Center for Medicare & Medicaid Innovation (CMMI)
“The Innovation Center”
 - www.innovations.cms.gov
- Project Management Institute National & Baltimore Chapter
 - www.pmi.org
 - www.pmibaltimore.org





Health IT Project Management 101:How to Avoid Failure

Friday, June 22nd, 2012



Headquartered in Portland, Oregon and founded in 2000, OCHIN is a national non-profit collaborative, nationally recognized for its innovative use of Health IT to improve the integration and delivery of health care services across a wide variety of practices.

With the ultimate goal of transforming health care in the United States, OCHIN provides integrated HIT software products and a wide variety of services, training and education to community health clinics, mental health services and small practices serving the medically underserved.

www.ochin.org

OCHIN Business Lines

Epic Hosted Platform

- Practice Management
- Electronic Health Record
- Health Information Exchange
- Significant customizations for FQHC/RHC
- 55 Member organizations in 11 states

eCW Hosted Platform

- Practice Management
- Electronic Health Record
- Health Information Exchange
- 47 Private Practices in 4 states

Data Services and Products

- Solutions Clinical Repository
- Data Aggregation
- Premium Reporting Services

Practice Based Research

- Safety Net West Practice Based Research Network
- CHARN Node

Professional Business Services

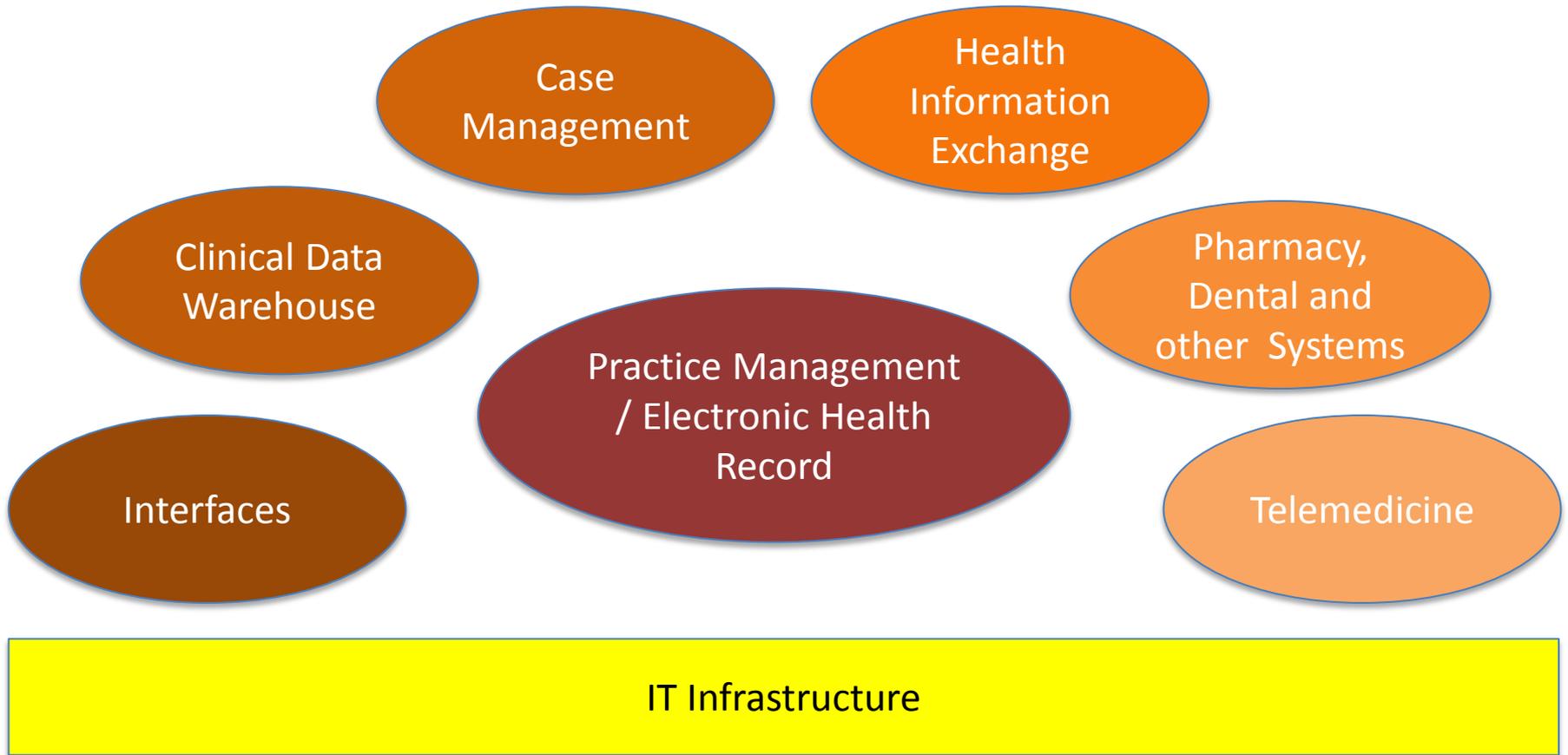
- O-HITEC Regional Extension Center – working with 2600 providers in Oregon get to Meaningful Use
- Outsourced Billing Services
- Group Purchasing Services
- Consulting Services



Health IT Project Management 101:How to Avoid Failure

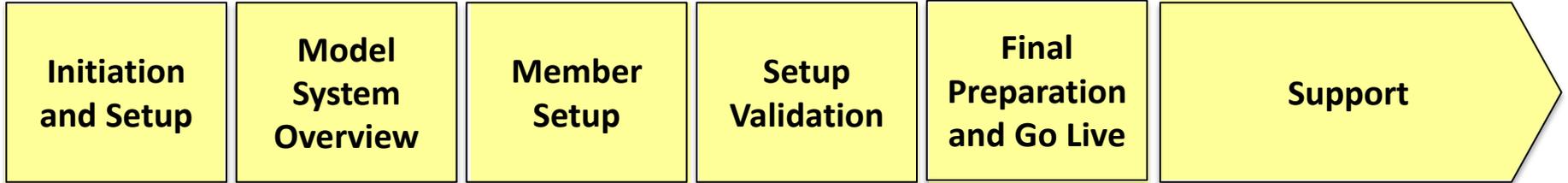


The Technologies



Implementation Process

- Core Initiatives -



Training

Change Management

Collaborative Participation

Workflow Development

Project Management

HIT Implementation Success Factors

Strong Clinic Leadership

Experienced Partners

Time Invested on Workflow Design and Training

Change Management Planning

Plan for Ongoing Support

Understanding the Financial Commitment



Strong Clinic Leadership



- Must have Executive leadership throughout
- Must have Clinical leadership throughout
- Great idea to have Board leadership
- Choose wisely, trust and empower your team
- Be visible, supportive and unwavering in commitment
- Expect the best, plan for the worst
- Recognize successes

Experienced Partners

- Look for Experience
- Financial Viability
- Regional market penetration
- Reference checks / site visits
- Community
- Strong leadership team





Workflow and Training

- Include all departments
- Document workflows from multiple sources
- Consider how appointments are scheduled
- Do not discount anomalies
- Opportunity to streamline and standardize work processes
- Anticipate and embrace new methods

An EHR that does not integrate smoothly within the clinical workflow will not allow for variation in style and risks poor adoption among users or improper and unnecessary workarounds.

Plan for Ongoing Support

- Support at your site
- Supporting for new programs
- Managing infrastructure
- Software updates
- Ongoing training activities
- Measuring and monitoring success metrics



Understanding the Financial Commitment

- Staff time – training, extraction, novice to expert
- Productivity implications post go-live
- Space renovation
- Hardware, software, connectivity
- Training and education
- Ongoing costs



Review of HIT Implementation Success Factors

Strong Clinic Leadership

Experienced Partners

Time Invested on Workflow Design and Training

Change Management Planning

Plan for Ongoing Support

Understanding the Financial Commitment



Questions?



Amy Cooper, Director of Epic Installation Services

coopera@ochin.org

Health IT Project Management 101

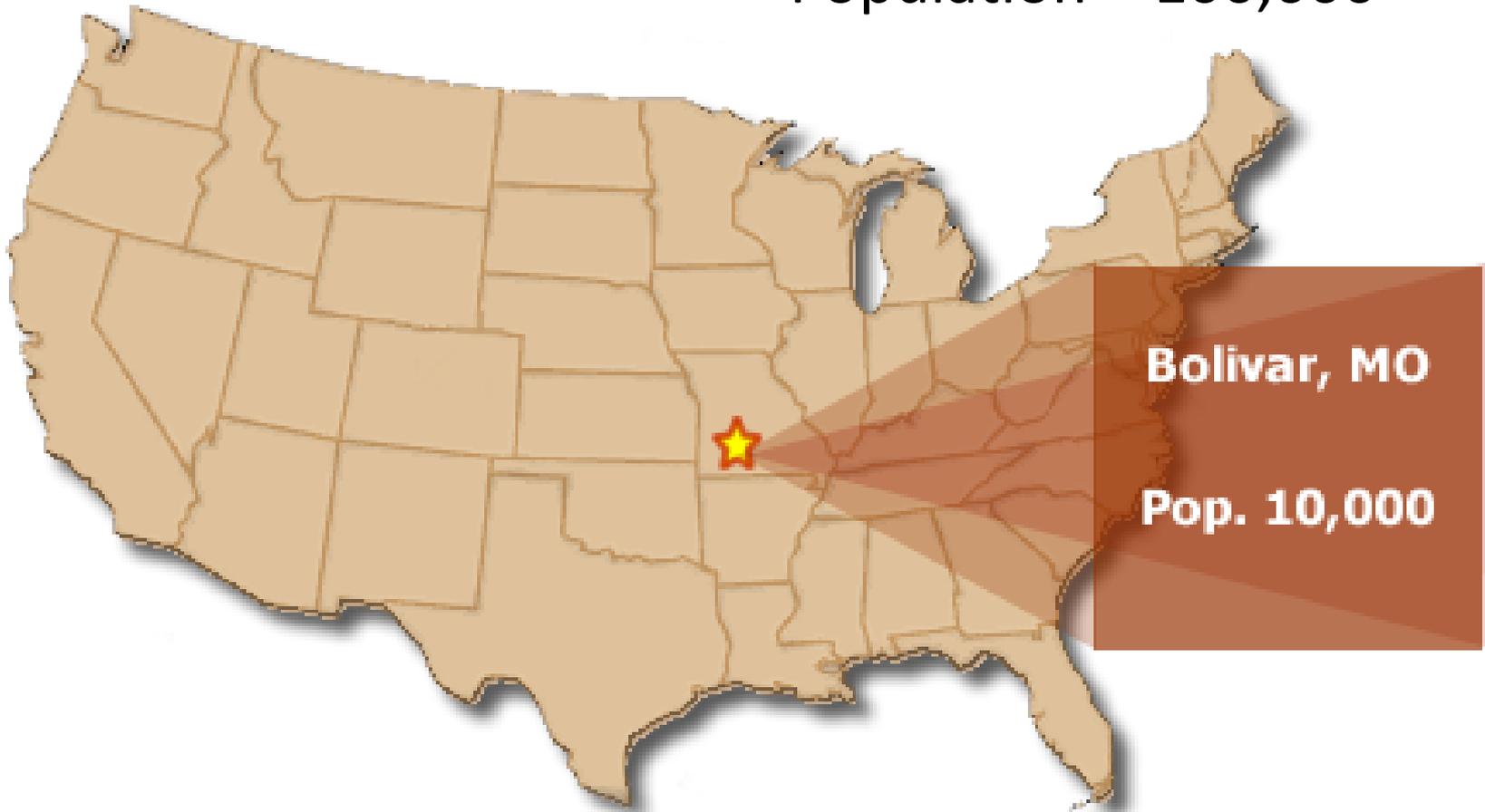
How to Avoid Failure



Karrie Ingram, PMP
Project Manager, Infocare Network

CMH Numbers

- Employees = 1,550
- Physicians = 125
- Service Area
Population = 100,000



Citizens Memorial Healthcare

- JCAHO Accredited
- Sole Community Provider
- Organization
 - Public Hospital District
 - Non Profit Foundation



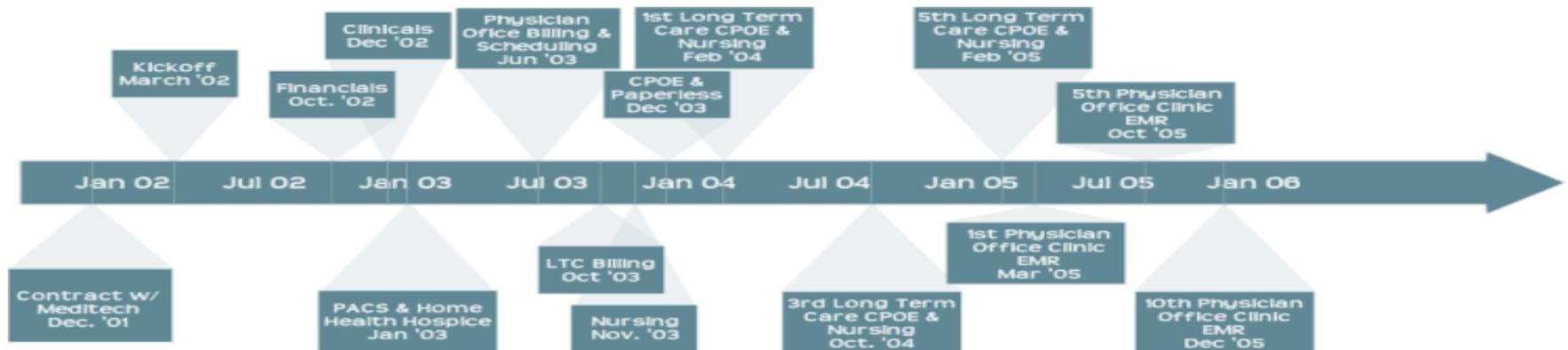
Citizens Memorial Services

- Acute Care (76 beds)
- Emergency Services & Ambulance
- Home Health, Hospice, HME, Health Transit
- Long Term Care Facilities (6)
- Residential Care Facility (1)
- Physician Clinics (26 clinics)
- Outpatient & Rehab Services
- Ambulatory Surgery Center
- Carrie J. Babb Cancer Center

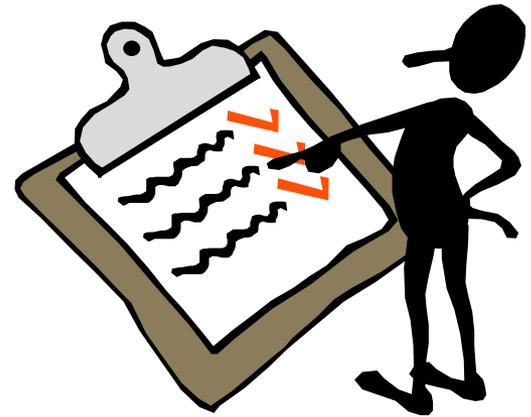


Project Infocare Timeline

1999	Strategic Planning – Seamless Care Across the Continuum
2000	IT Needs Assessment, Goals, Philosophy, Vision
2001	Vendor Selection & Implementation Approach/Plan
2002	Core Financial & Clinical Systems
2003	Physician Practice Management System, home care, LTC Financial, Hospital Nursing, CPOE, Physician Documentation (paperless in hospital)
2004	PACS, LTC Clinical (paperless in LTC)
2005	Electronic Ambulatory Record in Physician Clinics (paperless in clinics)
2006	Emergency Room & bedside medication verification with barcodes
2007	In-home tele-management (Well@Home)
2008	Speech Recognition, PACS expansion
2009	Patient Portal, Integrated vital signs monitors and glucometers, ePrescribing, Maestro
2010	Personal Health Record Integration, HR, Telehealth/Telediagnosics
2011	Quality/Risk Management, Health EMS (Ambulance), Cardiac PACS



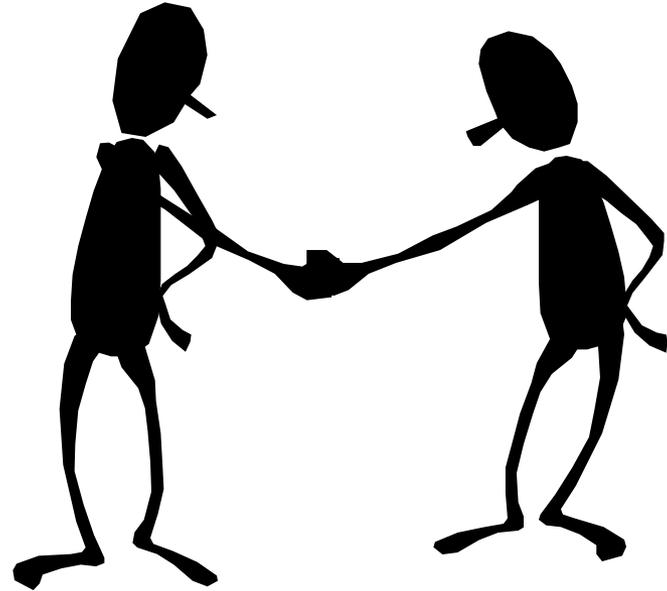
Initiating



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Agree on the Why

- Strategic initiative
 - Seamless care across the continuum
- Expressed in vision statement



Adopt an Approach

- Guided by vision and strategic plan for CMH
- Integration strategy
- Priority to system that meet overall organization needs
- Single core vendor whenever possible
- Develop infrastructure to support systems

Stakeholders

- Define
 - Board
 - C-Suite
 - Physicians
 - Clinical
 - Business
 - Support

- Involve
 - Participate in defining needs
 - Demonstrations
 - Site visits



Communicate how
their input can make a
difference

Project Charter

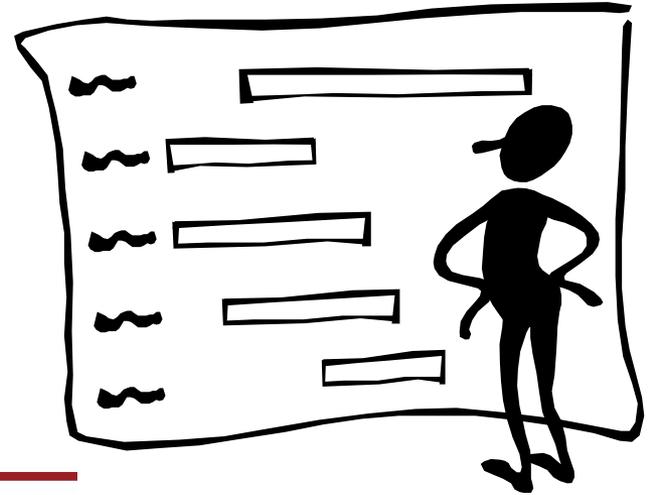
- Enable a patient to enter anywhere into our continuum of care and have a personal identity that is maintained across that continuum
- Physicians and other caregivers will have access to all of that patient's information within the healthcare system
- Providers will be able to document efficiently within the software system, which will free them to have more time to spend with patients
- The investment of time, talent and money will enable CMH to be a technologically advanced healthcare organization poised to grow and offer new services to our patients and the community at large

"Project Infocare has enabled us to achieve the patient-centered integration across our system that I had envisioned for our organization for many years. The system has put us in a position to grow and meet the needs of the community and to adapt rapidly to regulatory and reimbursement changes."

Donald J. Babb | Chief Executive Officer | CMH



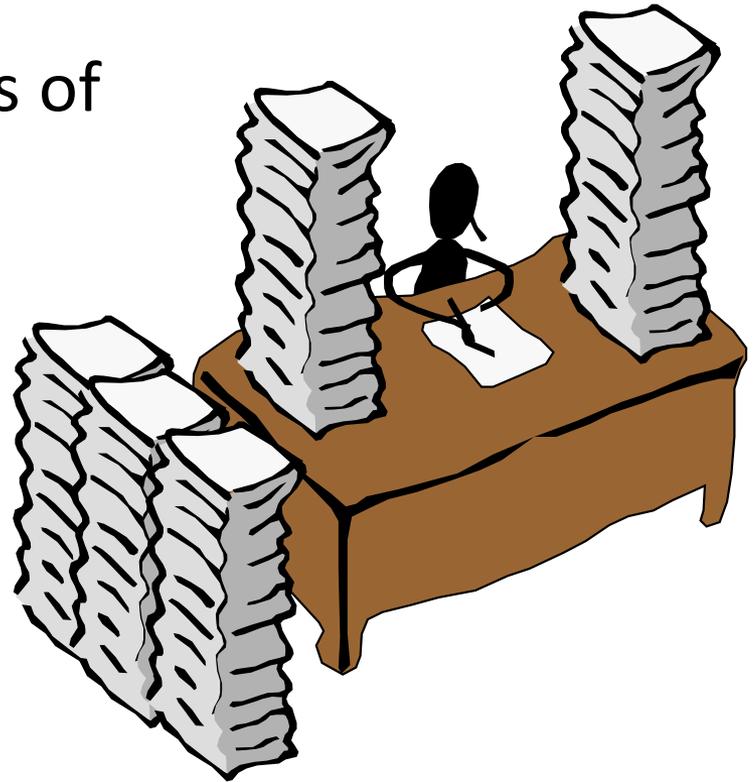
Planning



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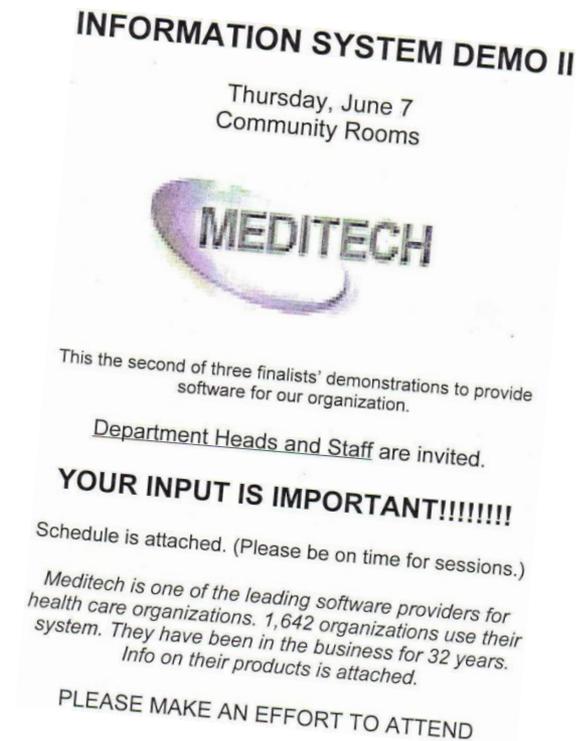
Finding an EMR

- VHA Consulting
- 39 Project Teams representing functions & departments
- Weighting of functions/areas of importance
- 200+ pages of functional requirements
- 8 complete responses
- Narrowed to 3 based on weighted score



Decision Process

- Demonstrations w/user evaluations
- Site Visits (5)
- References
- Additional Demo for Physicians & Board
- Corporate Visit
- Total Cost Analysis
 - Meditech
 - Related Software/Systems (3M, Pyxis, etc.)
 - Hardware
 - Implementation Staffing
 - Implementation Travel/Training

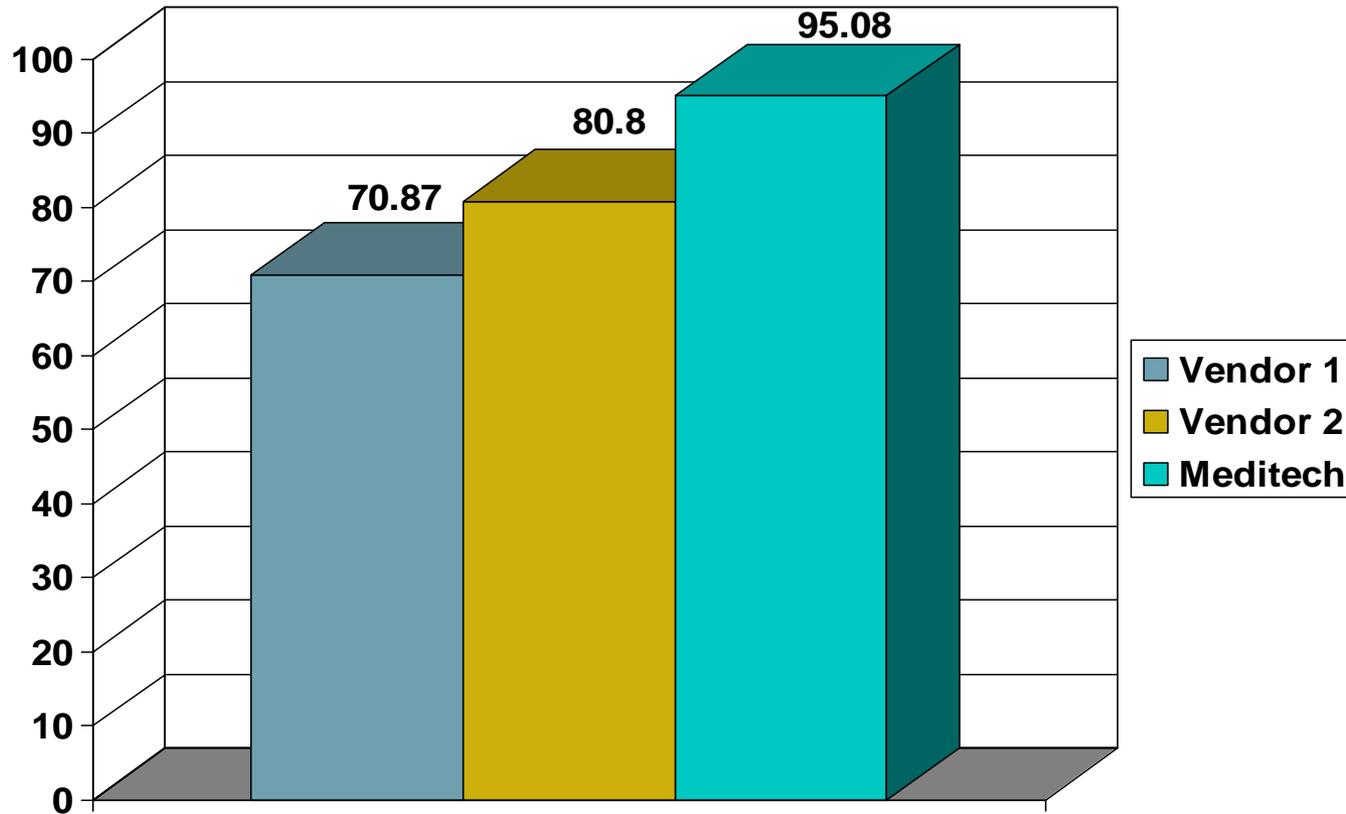


Estimate Costs & Determine Budget

- Administrative, physician & board support
- \$\$\$\$ Money \$\$\$\$
- The right people



Decision Criteria Weighted Score



Document the Official “Go Ahead”

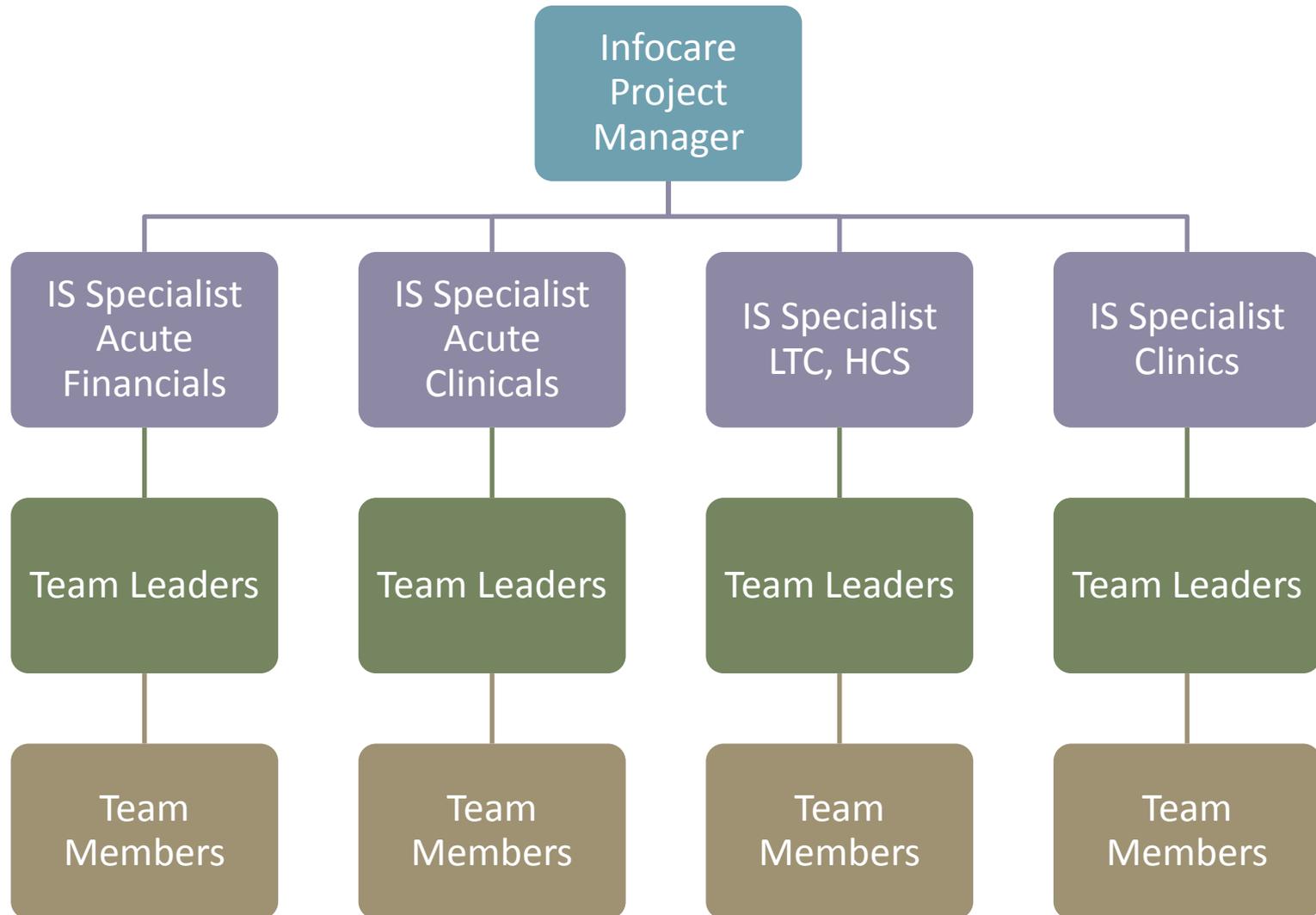
- Include resources
 - \$\$
 - People/time
 - Support
 - Broad timelines



Executing

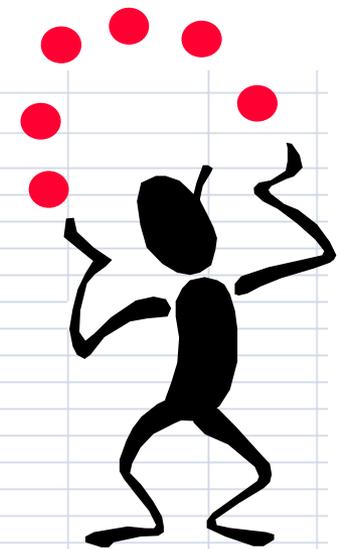


Project Teams



Aggressive Schedule

2002	SOFTWARE DELIVERY	INTRO CALL	ASSESSMENT	DICTIONARY	APPLICATION I	APPLICATION II	APPLICATION III	LIVE!!!			
	PHA	July	April 25 1000 in BR	May 21-23 in CR-2	June 26-28 C BOOKED!! Motel booked	Aug 20-23	Sept. 24-26	N/A	DECEMBER		
OE/EMR	July	May 20 1300 in BR	June 12-13 PVHCF	July 9-11 C BOOKED!!	Aug 6-8	Oct. 22-24	N/A	DECEMBER			
ITS	August	June 21 1300 in BR	July ?????	July 30-Aug 2 BOOKED!! Motel booked	Sept 4-6	Oct. 8-10	Nov 6-8	DECEMBER			
OR		June 20 1300 in BR	July 23-24 in CR 2-1	August 13-15 BOOKED!!	Sept 17-19	Oct 16-17	N/A	DECEMBER			
	SOFTWARE DELIVERY	INTRO CALL	ASSESSMENT	DICTIONARY	APPLICATION I	WIRING CALL	APPLICATION II	INSTRUMENT CALL	APPLICATIONS III	APPLICATIONS IV	LIVE
LAB	June	May 30 1400 in BR	June 18-19 in CR-1	July 15-19 C BOOKED!! Canton	Aug 27-29	Sept. 13	Oct. 1-3	Sept. 27	Oct 29-31	Nov 12-14	DECEMBER

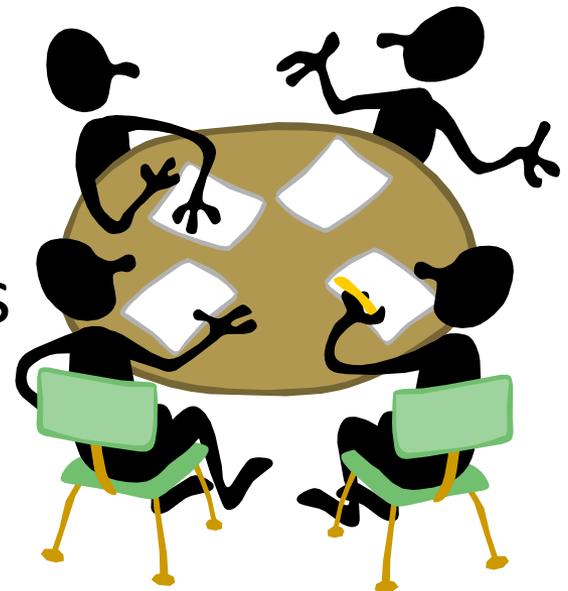


Clinical modules schedule- a juggling act!

Project Teams

Key Qualities

- knowledge of department or function
- trusted/respected, works well with other departments
- interest/enthusiasm
- communicator/listener
- organized/can meet deadlines
- motivated



Responding to Risk

- Get users up to speed
- Ask for what you need
- Avoid Silos



Integration

- Bridging the gap between Pharmacy and Physician Order Management
 - Naming conventions
 - Order strings



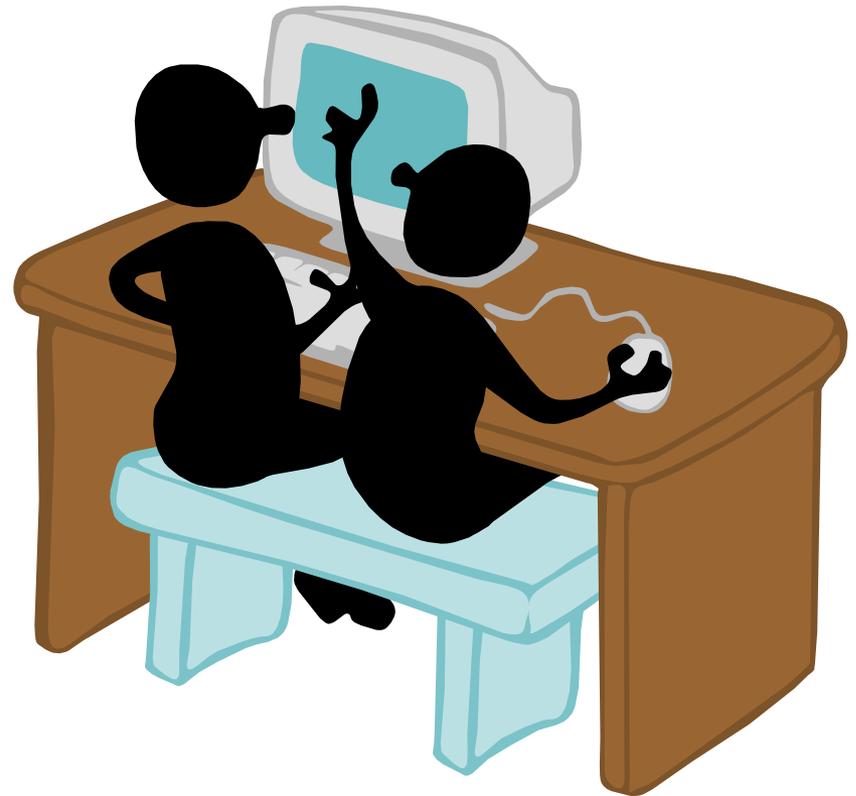
Cater to the Physicians



- Device options
- Physician resource room
- Physician desktop
- Intensive tracking & follow up on issues

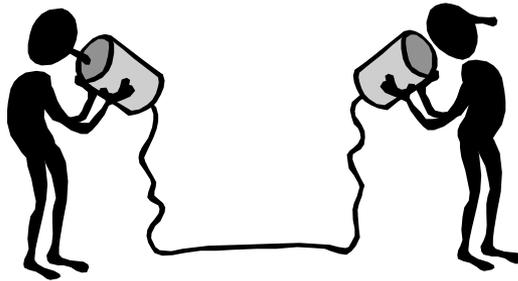
Make it Personal

- One-on-one training
- Order sets
- Favorites



Communication

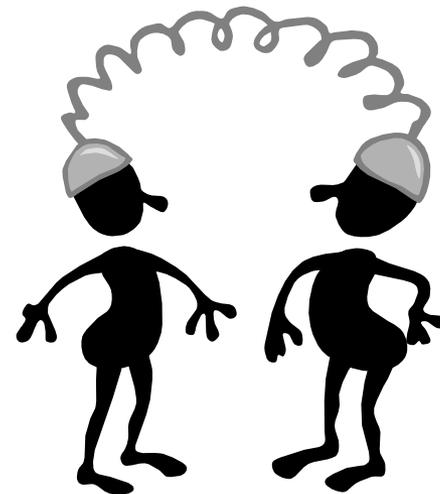
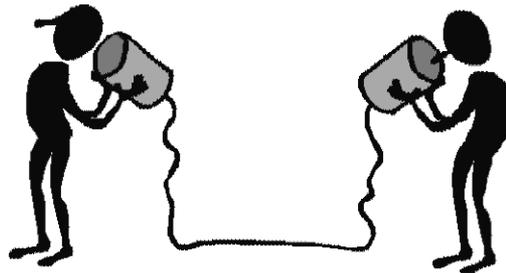
- Outbound communication / marketing



- Active solicitation of issues and concerns

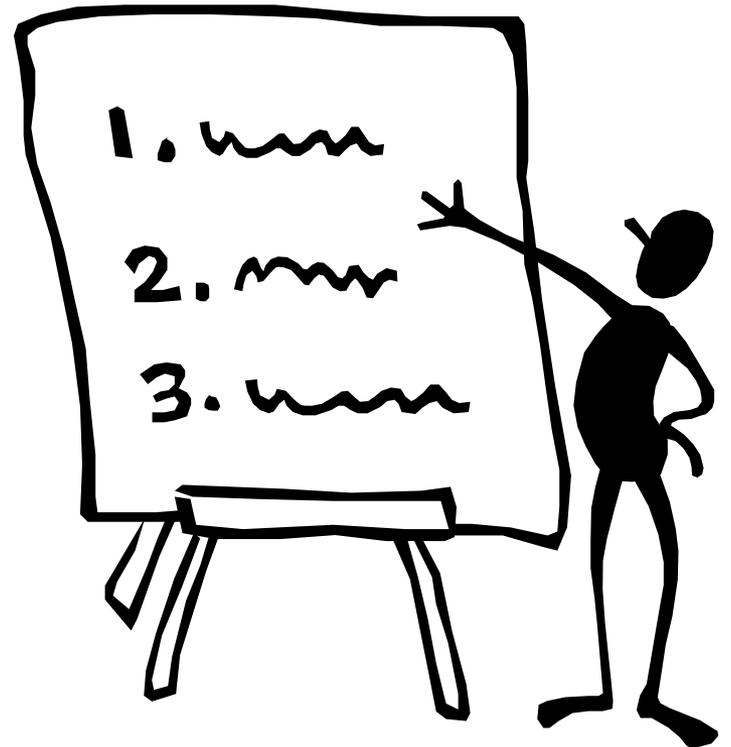
- Medical staff meetings
- Suggestion forms
- CPOE team forums
- Newsletters & Posters

- Inbound communication / listening



Phased Approach

- Viewing results, e-signature & entering notes
- Procedure ordering
- Medication ordering



Keep Moving Forward

- Go paperless
- Remove old forms from the area
- Be available



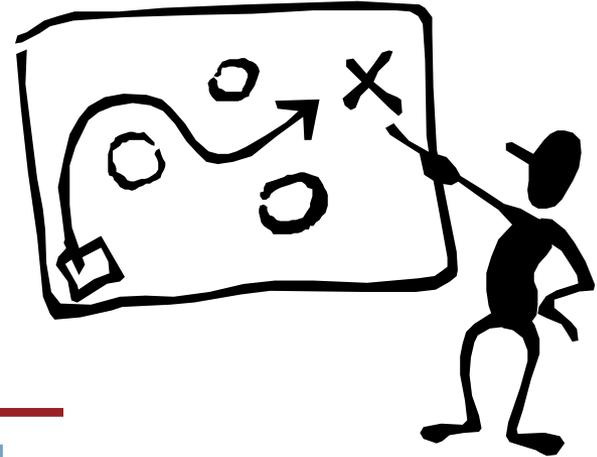
Manage Stakeholder Expectations

	May 20, 2011 Atrial Fib/Cardiomyopathy
	Citizens Memorial Hospital - Radiology/Diagnostic Imaging
	Provider Practice Visits
	Cmh Clinics
	Unknown Service Date Prost Cancer W/Mets/Hosp F/U
	Cmh Clinics - Cmh Urological Clinic
	Apr 19, 2011 Gi Bleed And Thrombocytopenia
	Citizens Memorial Hospital - Discharged: Apr 23, 2011
	Apr 19, 2011 Ambulance Only
	Citizens Memorial Hospital - Ambulance
	Apr 18, 2011 Sbed/Pneumothorax, Rib Fractures
	Parkview Healthcare - Parkview Northwest Hall - KH140/B
	Apr 12, 2011 Sbed/Pneumothorax, Rib Fractures
	Citizens Memorial Hospital - Discharged: Apr 18, 2011
	Apr 4, 2011 Fractured Left Ribs,6,7,With S...
	Citizens Memorial Hospital - Discharged: Apr 12, 2011

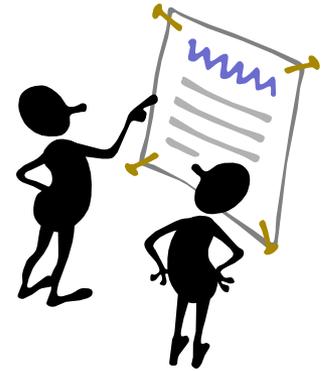


Monitoring and Controlling

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Articulate the Objectives



- Patients will be asked to supply information only once.
- Patients will be able to schedule appointments for all services from all locations.
- Documentation will be captured at the point of care.
- Charges to accounts will be created automatically as care providers document.
- CMH will give care providers easy-to-use, reliable, timely, accurate, and complete information available from any location.
- CMH will employ the new system tools to enhance patient care, improve delivery and safety of care and support decisions with access to knowledge bases.
- CMH will phase out paper documents and select query-able data elements over scanned images.

Common Through CMH System

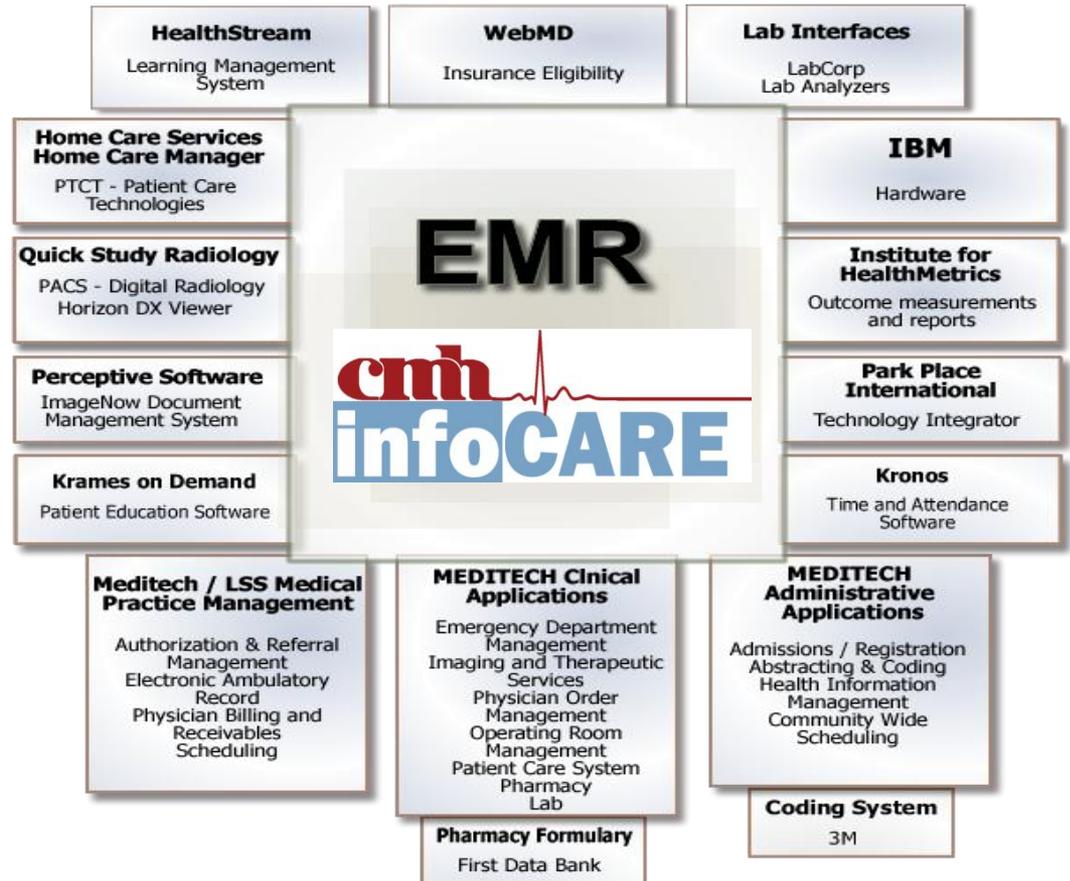
Allergies for Interaction Checking	Type	Severity	Date	Verified
Codeine (Codeine)	Allergy	Mild	1/29/09	Yes
Exenatide (From Byetta)	Adverse Reaction	Severe	8/5/10	Yes
Sulfa (Sulfonamide Antibiotics)	Allergy	Mild	12/15/08	Yes

Recent Visit Problems
ANXIETY
Dysphagia
EDEMA
Epigastric pain
Gastroesophageal reflux (GERD)
HIGH RISK MED USE
INSOMNIA
NECK PAIN
Nausea and vomiting
Medication

Social	
Smoking Status	<input type="radio"/> EVERY Day Smoker <input type="radio"/> SOME Day Smoker <input checked="" type="radio"/> FORMER Smoker <input type="radio"/> NEVER Smoker <input type="radio"/> AIN
Smoking Cessation Info Given?	<input type="radio"/> Smoker, Status Unknown <input type="radio"/> Unknown If Ever Smoked <input type="radio"/> Smokeless Tobacco User
Smoking Cessation Info Given?	<input type="radio"/> Yes <input type="radio"/> No
Positive for:	<input checked="" type="radio"/> Pregnant <input checked="" type="radio"/> Alcohol Use <input checked="" type="radio"/> Substance Abuse <input checked="" type="radio"/> Lactating <input type="radio"/> not really, just testing
Family	
Positive for:	<input checked="" type="radio"/> Cancer <input checked="" type="radio"/> Diabetes <input checked="" type="radio"/> Neurologic Problems <input type="radio"/> Psych Problems <input checked="" type="radio"/> Cardiac Disorder <input type="radio"/> Respiratory Disease <input checked="" type="radio"/> GI Disorders <input type="radio"/> Renal Disease
Past Surgeries	
Include:	<input checked="" type="radio"/> Neurologic Surgery <input type="radio"/> Transurethral Re: <input type="radio"/> Anesthesia Reactions <input checked="" type="radio"/> Cardiac Surgery <input type="radio"/> Dialysis <input type="radio"/> Genitourinary Surgery <input checked="" type="radio"/> Coronary Stent <input type="radio"/> Gynecologic Surg <input type="radio"/> Breast Surgery <input checked="" type="radio"/> Pacemaker <input checked="" type="radio"/> Hysterectomy <input checked="" type="radio"/> Surgeries <input type="radio"/> Thyroidectomy <input type="radio"/> Tubal Ligation <input checked="" type="radio"/> Hospitalization <input type="radio"/> Chest Surgery <input type="radio"/> Cesarean Section <input type="radio"/> Abdominal Surgery <input type="radio"/> Orthopedic Surgery <input type="radio"/> Cholecystectomy <input checked="" type="radio"/> Ear Surgery <input type="radio"/> Appendectomy <input type="radio"/> Eye Surgery <input checked="" type="radio"/> Urinary Tract Surgery

- Medication List
- Allergies
- Medical History
- Problem List

- EMR that crosses continuum
- 100% use of CPOE
- No paper charts



Continued Support

- Daily staffing
- Training on enhancements & upgrades
- Training for new physicians
- Continued communications
- Monthly physician champion meetings

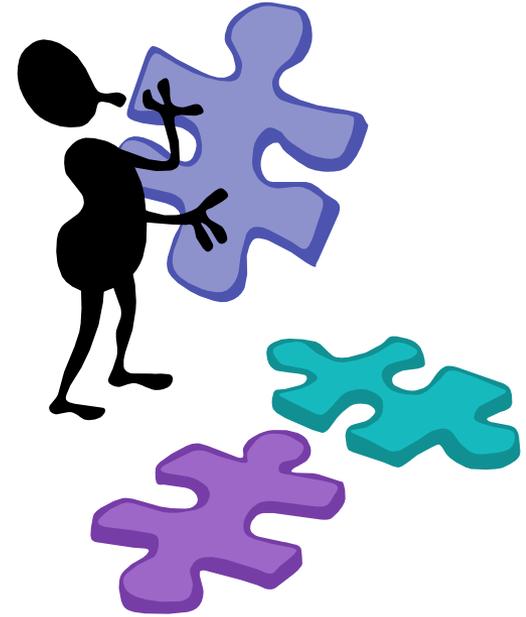


Expect it to be Hard

- Denial, Anger, Bargaining, Depression, Acceptance
- HIT the wall
- Secure CEO/Administrative support
- Keep on going



Closing



cmh
infoCARE

Closing

- Subject matter experts with technical aptitude = the best support team
- Extend and enhance through superusers



Because Information Technology Matters, an Invitation to be a Superuser

We spend a good portion of our lives at work. Here at CMH, that's a good thing - we have opportunities to work with great people, a worthy mission and a great environment.

Still, there are things that we might want to change. While we may not be able to knock out that wall for our own "backstage", get the thermostat set "correctly" or offload the monthly reporting time, we can make changes to the "virtual" workplace of Meditech. The profiles, rules, and dictionaries are, in large part, created and maintained by us. We would like your help in making our Meditech workplace more efficient, more integrated and more comfortable.

Because of your experience, your work with Meditech and your commitment to CMH, we would like to invite you to become a Meditech Superuser. The Superuser is now a formal agreement between you and CMH, which will allow CMH to compensate you for your work in creating the Meditech environment. The details of this agreement are in a separate document that you will sign. Mr. Bibb, your supervisor and the executive team for CMH have already approved this arrangement for you.

If making a difference matters to you, please join us as a Superuser.

Miscellaneous Tips & Tricks

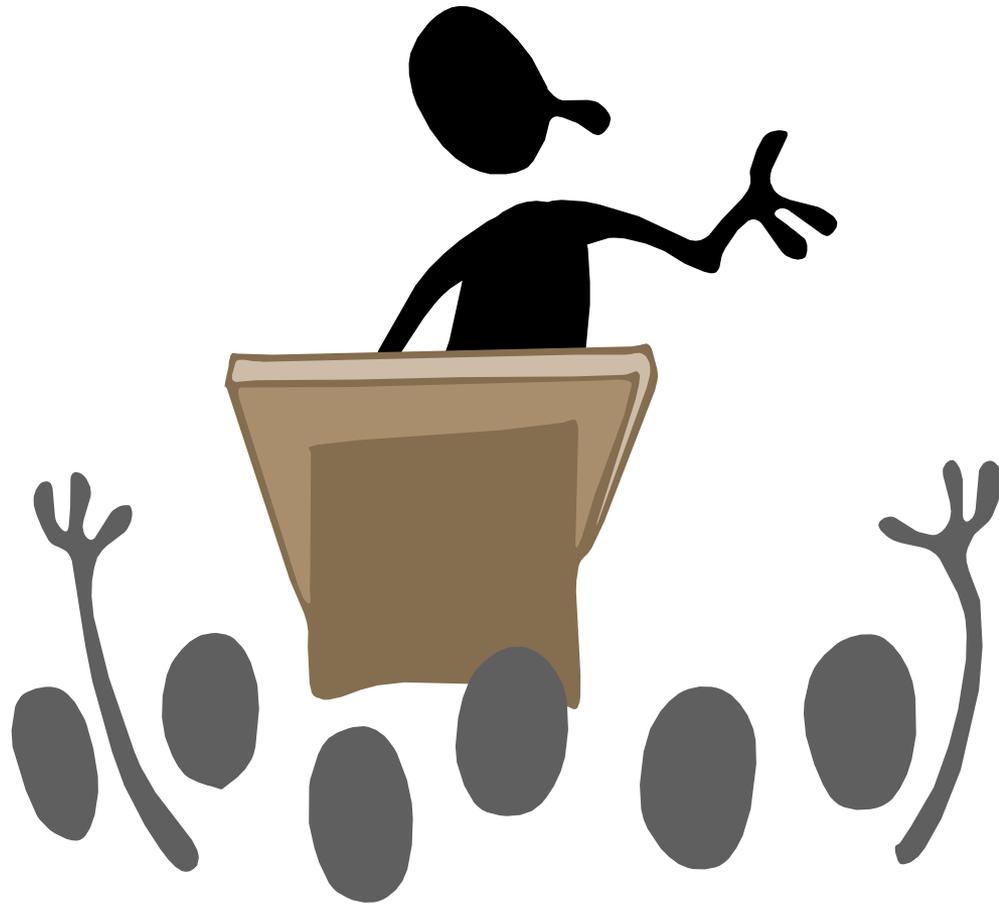
- Train for patient-friendly use
- Plan for quality reporting early
- Revisit the vision and objectives
- Become the tribal storyteller



Lessons Learned



- Top down support is paramount to success
- Communicate the fact that this isn't an IS driven initiative
- If you aren't moving forward, you are falling behind
- Market your accomplishments
- Your vendor is a partner
- If it's broke, fix it
- Exploit the software
- Be willing to beta things that are important to you



Thank you!

<http://www.citizensmemorial.com/>

Health IT Project Management Resources

- HRSA Health IT Toolboxes

- Resources Include:

- Rural Health
- Oral Health
- Meaningful Use
- Health IT Adoption
- HIV/AIDS
- Webinars
- Kids/Pediatrics

<http://www.hrsa.gov/healthit/toolbox/index.html>

- AHRQ Health IT Tools and Resources

http://healthit.ahrq.gov/portal/server.pt/community/health_it_tools_and_resources/919

- Office of the National Coordinator for Health IT's Regional Extension Center Program

<http://www.healthit.hhs.gov/REC/>