






# PITO Implementation & Transition Support Program (ITSP)

5/14/2008

	1. Application & Enrollment	2. Intake & Orientation	3. Planning & Analysis	4. Procurement	5. Implementation	6. Evaluation
<b>ITSP Services</b> 	<ul style="list-style-type: none"> <li>• Education &amp; Awareness</li> <li>• Physician Engagement</li> </ul>	<ul style="list-style-type: none"> <li>• Welcome phone call</li> <li>• Orientation Meeting</li> </ul>	Regular status meetings		<ul style="list-style-type: none"> <li>• EMR Vendor Hand-off Meeting</li> <li>• Go Live Acceptance Site Visit</li> </ul>	<ul style="list-style-type: none"> <li>• Post Implementation Review (PIR)</li> </ul>
<b>ITSP Tools</b>    	<ul style="list-style-type: none"> <li>• PITO Website</li> <li>• Physician Info Kit</li> <li>• Vendor Profiles</li> </ul>	<ol style="list-style-type: none"> <li>1. Registration Agreement</li> <li>2. Readiness Assessment</li> <li>3. Action Plan</li> </ol>	<ol style="list-style-type: none"> <li>4. Needs Assessment</li> <li>5. Budget Tool</li> <li>6. Privacy Guide</li> <li>7. CMA Privacy Wizard</li> </ol>	<ol style="list-style-type: none"> <li>8. Procurement Guide</li> <li>9. EMR Vendor Assessment Tool</li> </ol>	<ol style="list-style-type: none"> <li>10. Privacy &amp; Security Check List</li> <li>11. Physician EMR Acceptance Sign-Off</li> </ol>	<ol style="list-style-type: none"> <li>12. PIR Survey and Interview</li> </ol> <ul style="list-style-type: none"> <li>• 2-3 week post implementation review survey</li> <li>• 6 month EMR Adoption Survey</li> <li>• Annual EMR Adoption Survey</li> </ul>
Local Relationship Managers and Customer Relationship Management ( <i>Maximizer Database</i> )						
Local Physician Champions and Physician Engagement Activities ( <i>PUGs Tool</i> )						

**Legend**



**PITO Local Relationship Manager**



*PITO Field Resource*



Legal Agreement



Information Collection & Analysis Tool










Word Document














Online tutorial or survey



**“Just because we increase the speed of information  
doesn't mean we can increase the speed of decisions.”**








- Dale Dauten



Phase	Tools	Local Relationship Manager	Group Lead	EMR Vendor	PSP & Health Authority
1. Expression of Interest	<ul style="list-style-type: none"> <li> On-line Application Form</li> </ul>	<ul style="list-style-type: none"> <li>• Answer program questions</li> <li>• Review and validate application information</li> </ul>	<ul style="list-style-type: none"> <li>• Q/A</li> <li>• Complete and submit application form</li> </ul>	<ul style="list-style-type: none"> <li>• Re-direct inquiries to PITO LRM, office or web site</li> </ul>	<ul style="list-style-type: none"> <li>• Re-direct inquiries to PITO LRM, office or web site</li> </ul>
2. Intake & Orientation  (Month 1)	<ul style="list-style-type: none"> <li> Welcome meeting</li> <li> Welcome Phone Call Outline</li> </ul>	<ul style="list-style-type: none"> <li>• Introduce role of LRM and describe ITSP services</li> <li>• Schedule Orientation meeting &amp; Readiness Assessment</li> <li>• Notify PSP and HA contacts</li> </ul>	<ul style="list-style-type: none"> <li>• Ask questions</li> <li>• Schedule Orientation meeting</li> </ul>	<ul style="list-style-type: none"> <li>• N/A</li> </ul>	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
	<ul style="list-style-type: none"> <li> Orientation Meeting</li> <li> Readiness Assessment</li> <li> Registration Agreement</li> <li> Action Plan</li> </ul>	<ul style="list-style-type: none"> <li>• Present orientation presentation</li> <li>• Conduct Readiness Assessment: risk assessment and mitigation plan, stakeholder identification</li> <li>• Draft Action Plan and review with Group Lead</li> <li>• Review Registration Agreement with physicians</li> </ul>	<ul style="list-style-type: none"> <li>• Goal setting</li> <li>• Review Registration Agreement with physicians</li> <li>• Risk Assessment and mitigation plan</li> <li>• Review draft Action Plan</li> <li>• Collect and fax signed Registration Agreements to PITO</li> </ul>	<ul style="list-style-type: none"> <li>• N/A</li> </ul>	<ul style="list-style-type: none"> <li>• Optional attendance at Orientation meeting</li> </ul>

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<p><b>3. Planning &amp; Analysis</b>  (Month 2)</p>	<ul style="list-style-type: none"> <li>•  <b>Site Visits (Analyze Needs)</b></li> <li>•  <b>Kick-Off Meeting</b></li> <li>•  <b>Needs Assessment</b></li> <li>•  <b>Needs Assessment - Process Guide</b></li> <li>•  <b>Budget Tool</b></li> <li>•  <b>Privacy Guide</b></li> </ul>	<ul style="list-style-type: none"> <li>• Weekly Status Meetings – review Action Plan and budgeting activities</li> <li>• Conduct practice site visit(s): Needs Assessment(s)                             <ul style="list-style-type: none"> <li>• EMR functional requirements</li> <li>• Future State Needs Summary (Sw, Hw, LAN, PPN, facilities &amp; add'l support)</li> </ul> </li> <li>• Update Action Plan and Create PITO SOW</li> <li>• <b>Collect signed copies of Registration Agreement</b></li> <li>• Present Kick-Off presentation</li> <li>• <b>Initiate PPN Analysis</b></li> <li>• Introduce Privacy Guide and CMA Wizard (not to be completed until closer to Go-Live)</li> </ul>	<ul style="list-style-type: none"> <li>• Weekly Status Meetings</li> <li>• Complete Action Plan</li> <li>• Needs Assessment: confirm EMR functional requirements and future needs</li> <li>• Create project Budget</li> <li>• Review Privacy Guide with appointed clinic Privacy Officer</li> <li>• Start updating the Vendor Assessment Tool, and/or creating a list of demo scripts, with information from Needs Assessment(s)</li> </ul>	<ul style="list-style-type: none"> <li>• N/A</li> </ul>	<ul style="list-style-type: none"> <li>• Optional attendance at group Kick-off meeting</li> </ul>

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	<ul style="list-style-type: none"> <li>•  <b>Field Resources (optional)</b></li> <li>•  <b>Field Resource Statement of Work (SOW)</b></li> </ul>	<p><b>Potential Field Resource Services:</b></p> <ul style="list-style-type: none"> <li>• Dedicated project management</li> <li>• Detailed workflow review</li> <li>• Privacy workshop</li> <li>• Privacy Impact Assessment (PIA)</li> <li>• Coaching/ Team Building</li> <li>• Detailed technical / LAN review</li> </ul>	<ul style="list-style-type: none"> <li>• Work with Field Resource</li> <li>• Update Needs Assessment</li> </ul>	<ul style="list-style-type: none"> <li>• N/A</li> </ul>	<ul style="list-style-type: none"> <li>• Varies</li> </ul>
<p><b>4. Procurement</b>  (Months 3-4)</p>	<ul style="list-style-type: none"> <li>•  <b>Vendor Profiles</b></li> <li>•  <b>Procurement Guide</b></li> <li>•  <b>Vendor Assessment Tool</b></li> </ul>	<ul style="list-style-type: none"> <li>• Introduce Vendor Assessment Tool and discuss preferred approach to vendor selection – Refer to Procurement Guide for recommended approach</li> <li>• Help define final review and selection process</li> </ul>	<ul style="list-style-type: none"> <li>• Review Vendor Profiles</li> <li>• Coordinate group participation and review of Vendor Assessment Tool</li> <li>• Define selection process</li> <li>• Schedule Vendor Demos</li> <li>• Call vendor reference sites</li> <li>• Review quotes and score vendors</li> <li>• Contract negotiations</li> </ul>	<ul style="list-style-type: none"> <li>• Demos and information sessions</li> <li>• Submit quotes</li> <li>• Contract negotiations</li> </ul>	<ul style="list-style-type: none"> <li>• N/A</li> </ul>

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<p>5. Implementation  (Month 4-6+)</p>	<ul style="list-style-type: none"> <li> <b>EMR Vendor Hand-off Meeting</b></li> </ul>	<ul style="list-style-type: none"> <li>• Conduct vendor hand-off meeting</li> <li>• Planning continuity (hold regular status meetings with Group/Practice Lead and Vendor)</li> <li>• Ongoing coordination with PSP, HA and TELUS regarding any connectivity issues</li> </ul>	<ul style="list-style-type: none"> <li>• Confirmation of Needs and implementation plan w/Vendor</li> <li>• Facilities orders</li> <li>• Communications Plan</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Confirm target timeline</b></li> <li>• Workflow Review</li> <li>• Needs confirmation</li> <li>• Data conversions</li> <li>• Interfaces</li> <li>• SW installation, configurations, customizations</li> </ul>	<ul style="list-style-type: none"> <li>• Any PSP deliverables (ex. CDM toolkit, rapid access, etc.) and related process changes</li> </ul>
	<ul style="list-style-type: none"> <li> <b>Coordination of any multi-stakeholder issue action items</b></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Obtain confirmation from group lead or physician lead that everyone is ready for training</i></li> </ul>	<ul style="list-style-type: none"> <li>• Test Plan</li> <li>• Test cases</li> <li>• Testing</li> <li>• Training Plan</li> <li>• Go-Live Plan</li> </ul>	<ul style="list-style-type: none"> <li>• Test Plan</li> <li>• Integration Testing</li> <li>• User Acceptance Testing</li> <li>• Training Plan</li> <li>• Go-Live plan</li> </ul>	<ul style="list-style-type: none"> <li>• IM/IS: VPN access from health authority sites</li> <li>• IM/IS: Testing or re-development of any pre-existing interfaces</li> </ul>

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	<ul style="list-style-type: none"> <li> <b>Go-Live Site Visit</b></li> <li> <b>CMA Privacy Wizard</b></li> <li> <b>Privacy &amp; Security Checklist</b></li> <li> <b>Acceptance Sign-off</b></li> </ul>	<ul style="list-style-type: none"> <li>• Review Privacy &amp; Security Checklist with Group Lead</li> <li>• Review any gaps</li> </ul>	<ul style="list-style-type: none"> <li>• Complete CMA Privacy Wizard</li> <li>• Workflow changes</li> <li>• Business process training</li> <li>• EMR Training</li> <li>• Go-Live communications</li> <li>• Complete Go-Live Check List and address any gaps</li> </ul>	<ul style="list-style-type: none"> <li>• De-Commissioning</li> <li>• EMR Training</li> <li>• Workflow changes</li> <li>• Go-Live Support</li> <li>• Vendors can invoice physician(s)</li> </ul>	<ul style="list-style-type: none"> <li>• Any PSP deliverables (CDM Toolkit, Advanced Access, etc.) and related workflow process changes</li> </ul>
<p><b>6. Evaluation</b> <b>(Ongoing)</b></p>	<ul style="list-style-type: none"> <li> <b>Post-Implementation Review</b></li> <li> <b>PIR Survey</b></li> <li> <b>PIR Interview</b></li> </ul>	<ul style="list-style-type: none"> <li>• Conduct PIR 4-6 weeks after Go-Live</li> <li>• Review results of PIR with Vendor and Practice Lead</li> <li>• Follow up with any action items that result from the PIR interview questions</li> </ul>	<ul style="list-style-type: none"> <li>• Participate in Post - Implementation Review</li> </ul>	<ul style="list-style-type: none"> <li>• Ongoing Support</li> <li>• Review results of PIR with PITO</li> <li>• Follow up with any action items that result from the PIR</li> </ul>	

Phase	Tools	Local Relationship Manager	Group Lead	EMR Vendor	PSP & Health Authority
	<ul style="list-style-type: none"> <li data-bbox="359 302 636 418">  <b>6 month EMR Adoption Survey</b> </li> <li data-bbox="359 435 636 552">  <b>Annual EMR Adoption Survey</b> </li> </ul>	<ul style="list-style-type: none"> <li data-bbox="726 302 1087 370">• Follow up with Practice Lead(s) to complete surveys</li> <li data-bbox="726 386 1087 519">• Review survey results with Vendors, Health Authority, Primary Care teams / PSP and other stakeholders</li> </ul>	<ul style="list-style-type: none"> <li data-bbox="1121 302 1325 370">• Complete and submit surveys</li> </ul>	<ul style="list-style-type: none"> <li data-bbox="1417 302 1646 402">• Review results of adoption surveys with PITO</li> </ul>	<ul style="list-style-type: none"> <li data-bbox="1711 302 1980 402">• Review possible next steps and PSP programs of interest</li> </ul>