

# Are You Ready For Some MEDITECH Advanced Clinicals?

2007 International MUSE Conference

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HEALTHCARE MANAGEMENT CONSULTANTS

# Presentation Agenda

- Introduction
- MEDITECH's Role
- Advanced Clinical Assessment Approach and Methodology
- Project Tools and Resources
- Deliverables
- Case Studies
- Questions and Answers



# MEDITECH's Role



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# MEDITECH's Role

- Assignment of Advanced Clinical Coordinator
- Individualized Advanced Clinical Project Plan
- Two phase EDM and PCM Implementation
- Advanced Clinical Site Visits & Planning Meetings/Calls
- Advanced Clinical Kick Off Visit
- Pre-implementation Education and Support
- Ongoing Project Management & Risk Management
- Continued support after initial pilot go live

(goal: 75-100% utilization of CPOE and fully electronic clinical record)



# Advanced Clinical Project Plan - MEDITECH

	Year 1				Year 2				Year 3				Year 4				Year 5			
	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4
<b>HCIS Phase 1 Applications:</b>																				
Fins, Admins, Depts, Basic OE				S																
EMR, e-signature, PACs				S																
<b>Software Release Upgrade:</b>																				
5.x.x., 6.x.x																				
<b>Advanced Clinicals:</b>																				
Project Management & Governance																				
Readiness Assessment																				
Process Analysis & Redesign																				
Physician & Clinician Engagement																				
Order Set Review & Development																				
System Optimization & Preparation																				
Hardware/Network Preparation																				
Quarterly checkpoints	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Nursing/Patient Care System (PCS)</b>																				
Nurse/Therapist Documentation																				
Electronic MAR, BMV																				
Status Board																				
<b>Emergency Dept Mgmt (EDM)</b>																				
Tracker (patient/dept mgmt)																				
Nurse documentation/charting																				
Physician CPOE & documentation																				
<b>Physician Care Manager (PCM)</b>																				
Physician Desktop/clinical review																				
Pocket PC																				
CPOE - pilot roll out																				
CPOE - full utilization																				
Physician Documentation																				



# Advanced Clinical Project Plan - MEDITECH

	Year1												Year2												Year3		
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR
Computer Infrastructure	XXX	XXX																									
HCIS KickOff			XXX																								
Advanced Clinical Preparation				XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX											
Project Management & Governance																											
Readiness Assessment																											
Process Analysis & Redesign																											
Physician & Clinician Engagement																											
Order Set Review & Development																											
System Optimization & Preparation																											
Hardware/Network Preparation																											
MIS Training				XXX																							
General Financials				IS	D	T	T	T	T	T	L																
Abstracting/Case Mix						IS	D	T	T	T	T	L															
HIM-Admissions/Med Records						IS	D	T	T	T	T	L															
Quality & Risk Management							IS	D	T	T	T	L															
Billing/Accounts Receivable						IS	D	T	T	T	T	L															
Imaging & Therapeutic Services						I		T	T	T	T	L															
Order Entry Enterprise Med Rec						IS	D	T	T	T	T	L															
Pharmacy						IS	D	T	T	T	T	L															
Lab/Mic/BBK/PTH						IS	D	T	T	T	T	L															
Community Wide Scheduling							IS	D	T	T	T	L															
Operating Room Management						IS	D	T	T	T	T	L															
<b>Advanced Clinicals</b>																											
PatientCare SystemPatientSafty													I	D	T	T	T	T	T	T	L						
Phys Care Manager - Phase 1 : phys desktop,e-sign,emr									D	T	T	L															
Emergency Dept. Mgmt-Phase 1 Tracker,nurse docum.																	IS	D	T	T	L						
Emergency Dept. Mgmt-Phase 2 CPOE,phys.Doc., departure																	IS	D	T	T	T	T	L				
Phys Care Manager - Phase 2: CPOE/POM,phys. docum.																		D	T	T	T	T	L				

# New Advanced Clinical Implementation Approach

<b>Pre-Implementation</b>	<b>Implementation</b>	<b>Post-Implementation</b>
<b>12 – 18 Months</b>	<b>7 – 9 Months</b>	<b>3 – 9 Months</b>
<b>Project Management &amp; Governance</b> ✓ Readiness Assessment ✓ Process Analysis & Redesign Physician & Clinician Engagement Order Set Review & Development System Optimization & Preparation Hardware/Network Preparation	<b>Ongoing Project Management</b> Integrated Application Trainings Phased PCM & EDM	<b>Stabilization</b> Maintain Momentum 75% or greater utilization of CPOE

✓ Consulting Service recommended



# Using Outside Consulting Services

- Readiness Assessments
- Process Analysis and Redesign
- Objective Third Party
- Understanding of MEDITECH's ACS approach
- References and methodology reviewed by MEDITECH
- Listed on the new MEDITECH Advanced Clinical website



# ACS Approach & Methodology



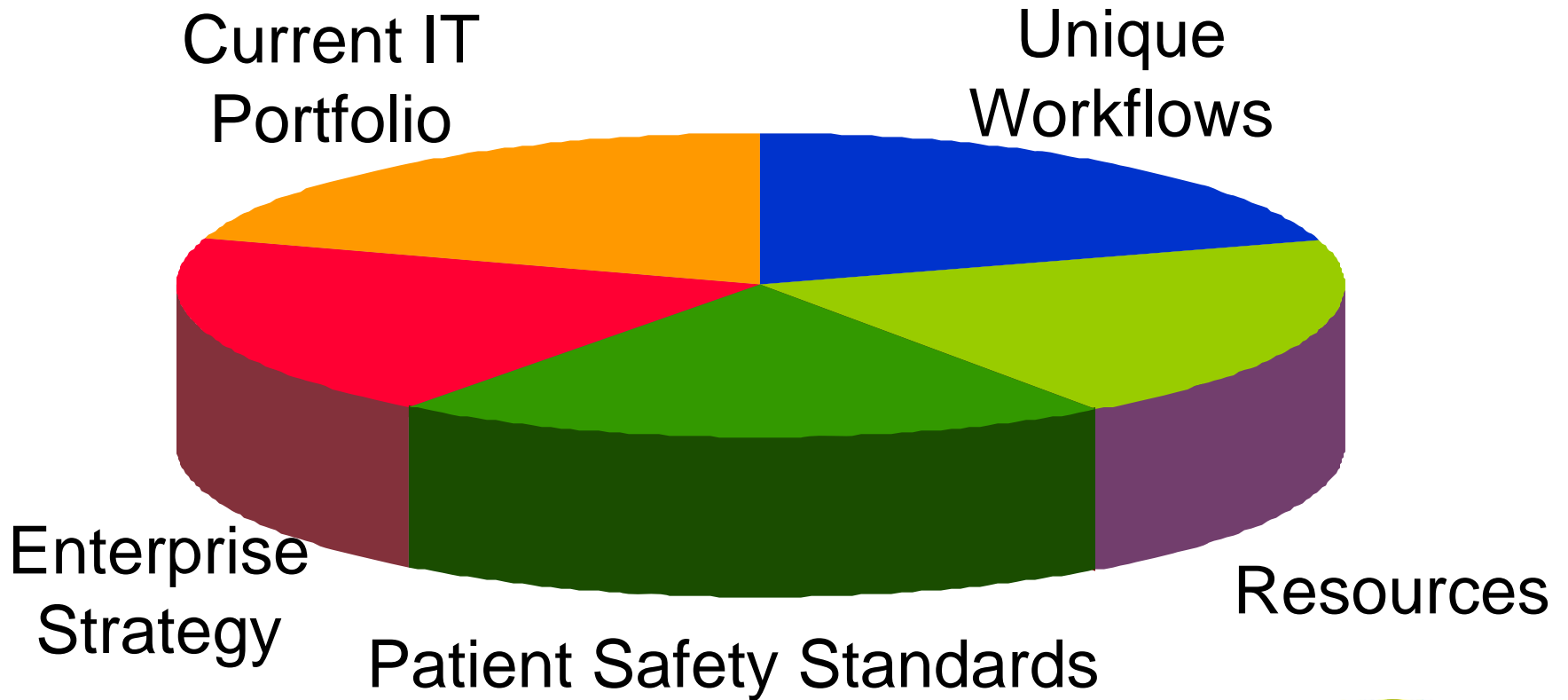
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# Readiness Assessment Approach

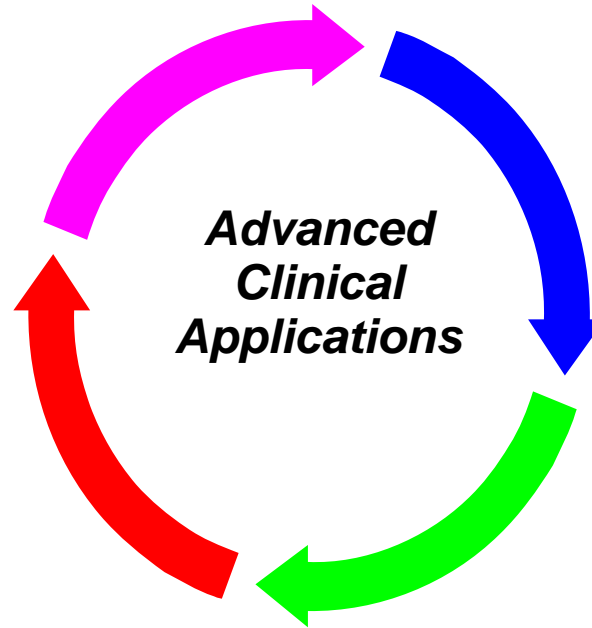
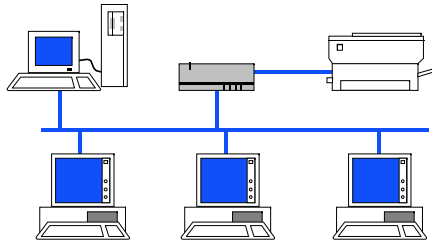
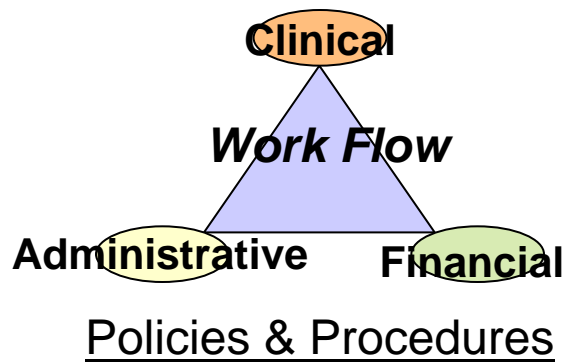
- Develop formula for success
- Targeted areas of evaluation
- Hospital wide analysis
- Executive level to end-user input
- Beyond the applications
- Work flow analysis and change management



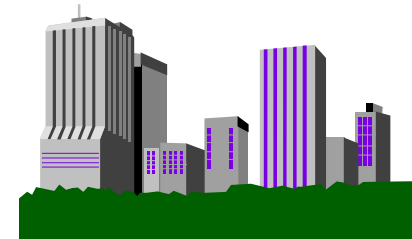
# Tailored for each Client



# Enterprise-Wide Approach



Compliance, Outcomes  
Management, & P4P



Internal/External  
Data Integration



# Example: BMV

## Operational Integration

### Technology Configuration

- wireless devices
- scanners/bc
- COWS

### Operational Process

- meds packaging
- elect. pt. verification
- meds validation

**Impact Analysis**



Staff Resources

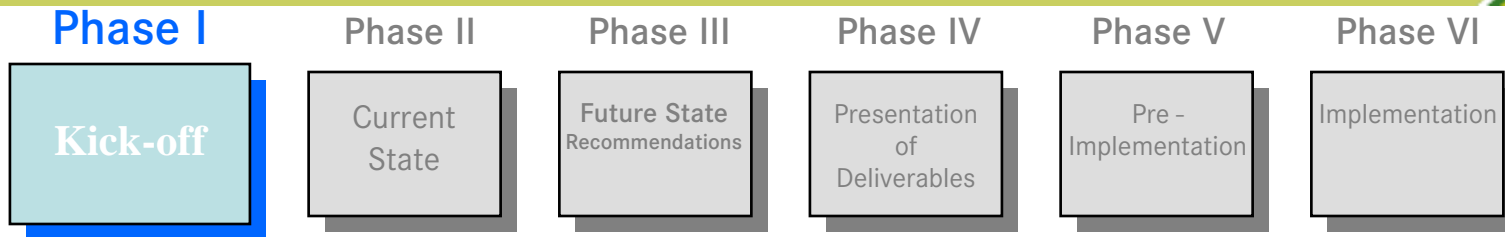
PharmD, R.N., IT



# Methodology – Phased Approach

- Kick-off Meeting
- Current state
- Future state recommendations
- Presentation of deliverables
- Pre-implementation
- Application Implementation

# Clinical Assessment Methodology



## Goals & Objectives

Develop solid foundation of expectations, methodology & timeframe of project

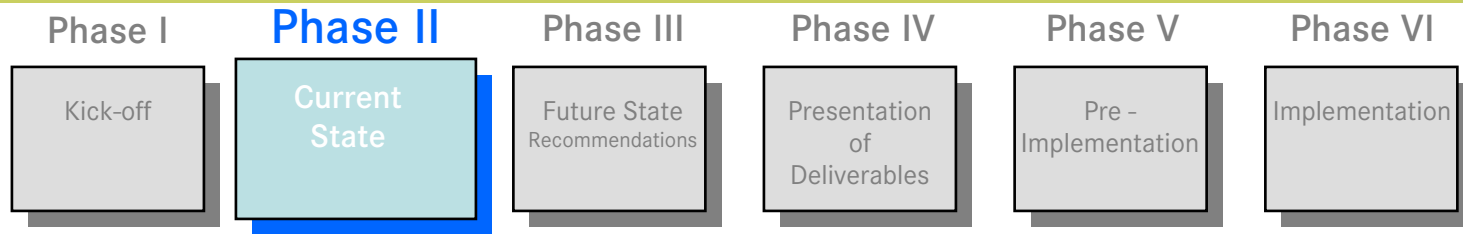
## Activities & Tasks

- Identify roles & responsibilities
- Establish expectations
- Review project methodology & timeframe
- Finalize interview schedule
- Develop project communication plan
- Define project success factors

## Milestones & Deliverables

- Meeting with client sponsor
- Work plan outlining major milestones & tasks

# Clinical Assessment Methodology



## Goals & Objectives

Assess effectiveness of business & clinical process flow & associated business operations including IS functionality

## Activities & Tasks

- Review patient care information collection policies and procedures, clinical data entry performance levels, staffing & quality measures
- Observe processes & work flows, i.e., scheduling, pre-registrations, registration, admissions, order placement, entry of patient vitals, etc.
- Document process and work flows
- Interview key personnel (nursing staff, physicians, physicians' assistants, etc.)
- Evaluate data collection processes and application integration
- Review revenue processes recognition from clinical systems
- Determine current network capacity / expandability
- Review installed wireless elements
- Create written plan for wireless implementation
- Identify weak or missing network components

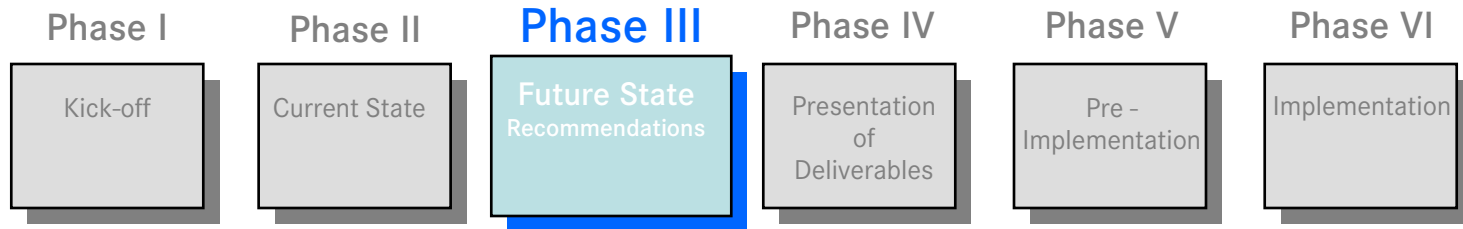
## Milestones & Deliverables

- Meeting with client to discuss initial observations

**Patient Safety**



# Clinical Assessment Methodology



## Goals & Objectives

- Develop future state model for IS improvements and introduction of new technology
- Develop transition recommendations

## Activities & Tasks

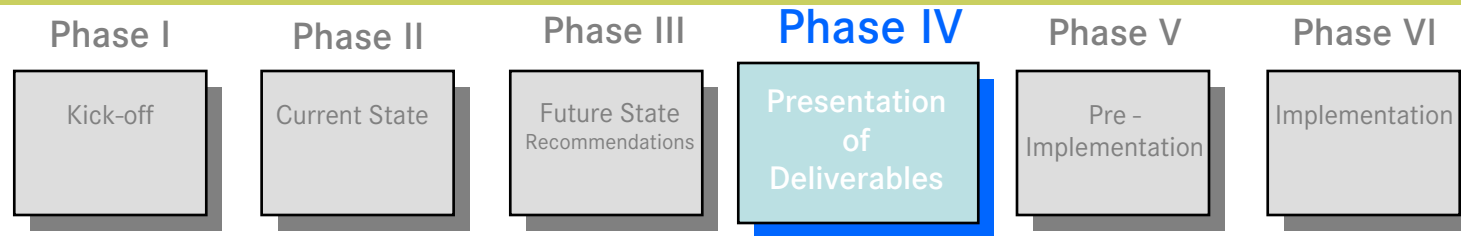
- Identify optimal work flow, policies & procedures, staffing & performance measures
- Validate efficiencies and/or recommend improvements
- Identify opportunities to improve application functionality and introduce new applications to support patient care, delivery & data collection
- Develop benchmarks & key indicators
- Provide network upgrade recommendations

## Milestones & Deliverables

- Future state model & recommendations

**Patient Safety**

# Clinical Assessment Methodology



## Goals & Objectives

Provide client with a concise report & presentation outlining realistic opportunities for improvements

## Activities & Tasks

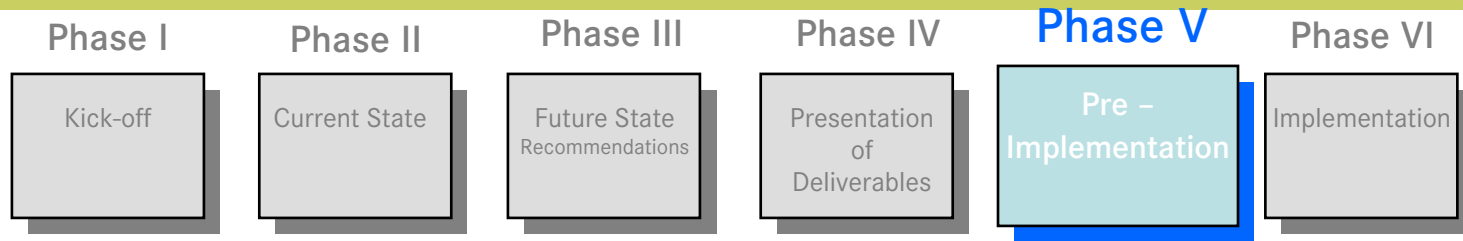
- Submit draft report to client
- Discuss findings & recommendations
- Provide clarification
- Obtain additional information for outstanding issues
- Revise report as appropriate
- Submit final report
- Formal presentation of findings & recommendations

## Milestones & Deliverables

- Report containing
  - executive summary
  - current state
  - transition recommendations
  - future state recommendations
- Outline of next steps
- Meeting with client

**Patient Safety**

# Clinical Assessment Methodology



## Goals & Objectives

Organize project teams and resources

Kick-Off Implementation

Define critical dates

Confirm implementation methodology and roll-out strategies

## Activities & Tasks

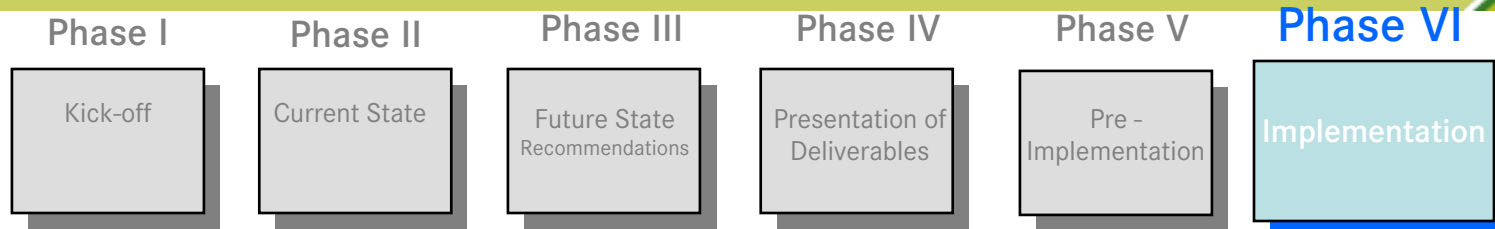
- Conduct Kick-off Meeting
- “Current Trends” Educational Session
- Review/revise IT vision
- Review/revise IT guiding principles
- Finalize engagement timeline/resources
- Review Workflows and System
- Compatibility (operational\*)
- Develop Interface Conversion Strategy
- Further Departmental interviews
- Review implementation-critical success factors
- Develop preliminary implementation sequencing
- Policies & Procedures
- Define Reporting Requirements

## Milestones & Deliverables

- Conduct MEDITECH site visits
- Conduct corporate visits (optional)
- Review MEDITECH documentation

**Patient Safety**

# Clinical Assessment Methodology



## Goals & Objectives

Application Configuration  
Review Workflows and System  
Compatibility (operational\*)  
Develop Interface Conversion Strategy  
Screen Design & File Building  
Design Security Matrix  
Unit Testing  
Volume Testing  
Simulation Testing  
Security Testing

## Activities & Tasks

- Finalize project team and resources
- Confirm project sponsorship and project team accountability
- Assign priorities to recommendations
- Develop detail project plan with timelines and resources
- Develop & Complete Test Plans
- Build Files & Screens
- Develop & Complete Testing

## Milestones & Deliverables

- Detailed project plan
- Project organizational chart
- Unit Testing
- Integrated/Parallel Testing
- Go-Live
- Testing Plans
- Status reports
- Final Engagement Summary

**Patient Safety**



# Project Tools and Resources



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# Assessment Tool - Overview

- Menu driven system that guides consultant through project
- Includes detailed forms and templates for:
  - Project plans and work steps
  - Assessment checklists
  - Information collection and analysis
  - Deliverable templates



# Assessment Tool Benefits

- Ensures timely and predictable work product
- Extremely comprehensive
- Saves time, is cost effective, and provides thorough and consistent results



# Assessment Tool - Resource

- Resource Center
  - Best Practices
  - Information website links
  - Relevant studies, papers, findings
- Provides timely and up-to-date information drawing on Beacon's considerable internal resources as well as credible external resources



# Example - Readiness Assessment Template

Beacon Partners, Inc.  
 Readiness Assessment Template  
 BMV

	Current Readiness	Comments
--	-------------------	----------

Weak Strong  
 1-----6

## 1. Change Readiness

Have all stakeholders been identified and the degree of impact assessed?

Is the Risk Manager considered a key stakeholder?

Do Key Stakeholders understand the need and feel motivated to change?

Do Key Stakeholders have a clear vision of the project?



# Beacon's Workflow Tool

- “Align-IT”
  - Business process documentation
  - Workflow modeling and analysis
  - Aligns people, operations, and technology
  - Streamlined business operations
  - Current State vs. Future State
  - Functional flowcharts



# Deliverables



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# Deliverables

- Executive summary
- Readiness assessment
- Current state, gap analysis & recommendations
- Risk analysis
- Work plan
- Out briefing

# ACS Readiness Assessment

- Written Observations & Recommendations
  - Project Charter
  - Roll Out Strategies
  - Communication Plan
  - Awareness Campaign
  - Application Readiness
  - Staffing Impact
  - Training Strategy



# ACST Assessment

(Sample Deliverable Excerpt)

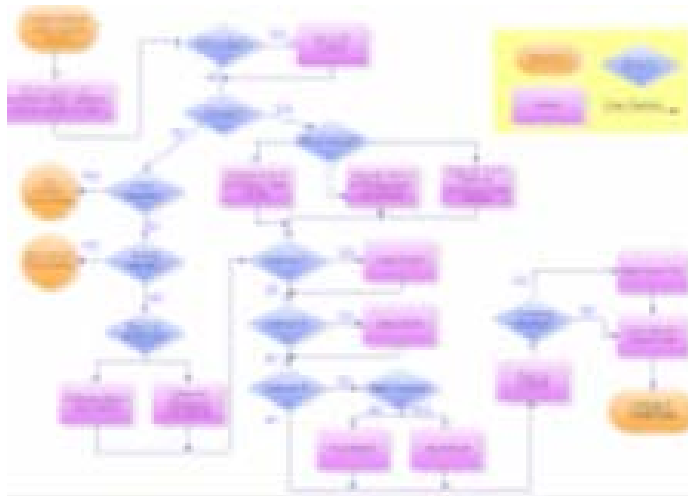
Item #	Readiness Component	Description	What it Exposes	Score 1 to 10	Possible Action Items
7	Access to Information <ul style="list-style-type: none"> <li>• Availability of Client Information</li> <li>• Clinician Use</li> <li>• Clinical Decision Support</li> </ul>	Clinician experience with clinical computing as an element of routine clinical work	Physician, nurse, clinicians, and all other end-users learning curve for clinical and computer functions  <b>High:</b> <ul style="list-style-type: none"> <li>• This process is being started with the Allscripts implementation for both hardware needs and core clinical data composition</li> </ul> <b>Low:</b> <ul style="list-style-type: none"> <li>• Mobile needs of staff for hardware has not been assessed</li> <li>• Many future end-users of the ECR do not have computer skills</li> </ul>	5	<ul style="list-style-type: none"> <li>• Increase clinician use of current clinical information systems</li> <li>• Deploy high- value automated tools to clinicians</li> <li>• Improve the reliability of client-specific core clinical data</li> <li>• Develop clinical decision support strategy</li> <li>• Develop integrated networks of care process</li> </ul>

# Current State vs. Future State

- Change Readiness
- Project Structure
- Workflow Documentation
- Policy and Process
- Technical Assessment
- Application Assessment
- Staffing Analysis
- Communication Analysis

# Workflows/Standardization

- More is not better!



# Current State vs. Future State

(Sample Deliverable)

<b>Section I</b>				
<b>TOPIC:</b> BMV				
<b>Goals:</b>				
<b>Item #</b>	<b>Current State Observations</b>	<b>Transition Recommendations</b>	<b>Future State Recommendations</b>	<b>Benefits</b>
Change Readiness				
Project Structure				
Workflow Documentation				
Policy and Process				
Technical Assessment				
Application Assessment				
Staffing Analysis				
Roll out Analysis				
Communication Analysis				



# ACS Readiness Scorecard

<i><u>Operational Readiness</u></i>	<i>Departments affected</i>	<i>Readiness Rating</i>	<i>Resource Requirements</i>
Clinician Adoption	All		
Workflow(s)			
System Access Controls			
Integration			
Quality Reporting			
Patient Safety			
Implementation			

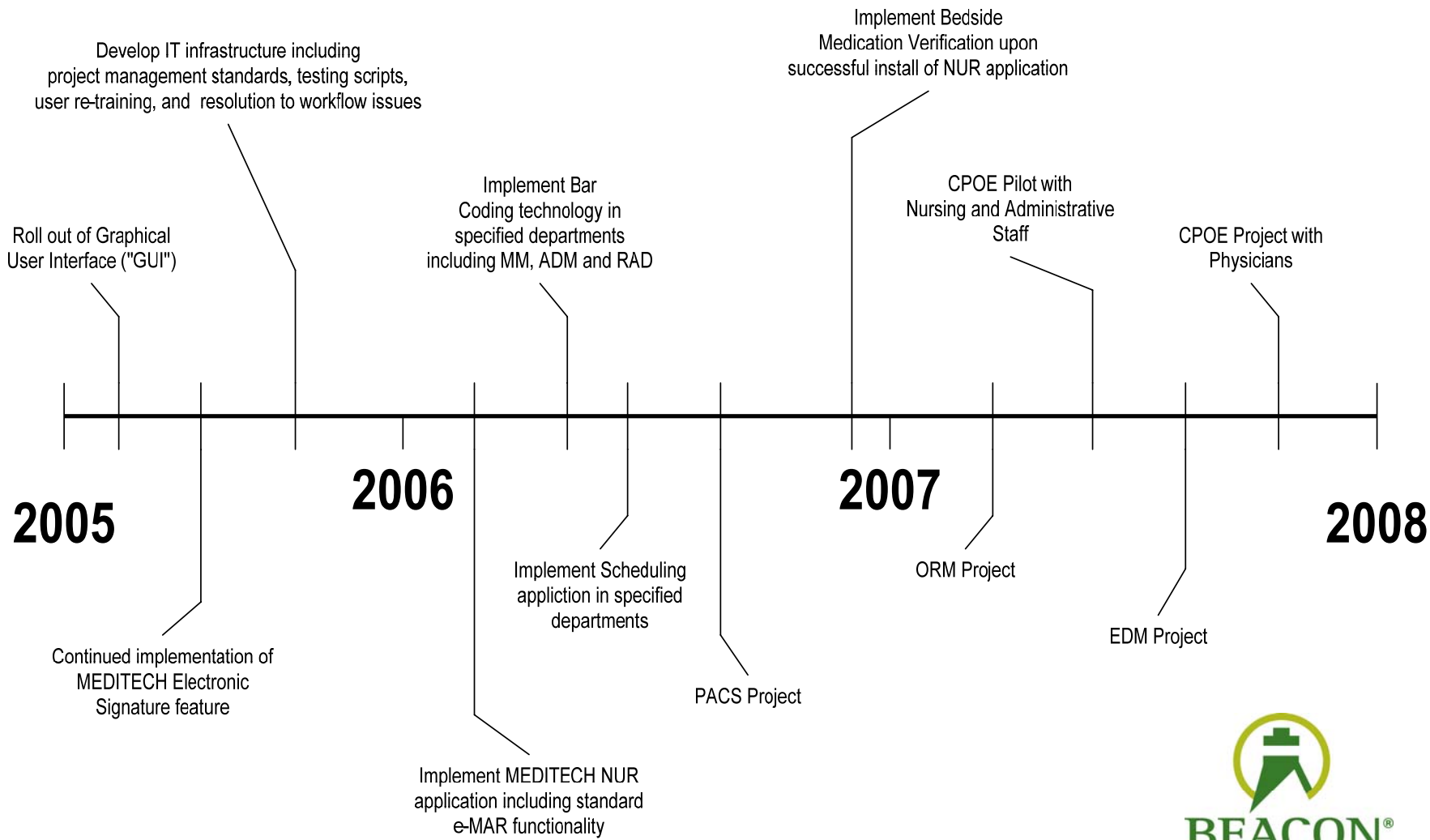


# Risk Analysis

<i>Risks</i>	<i>Frequency</i>	<i>Expected Impact</i>
Clinician Adoption	<b>High</b>	<b>High</b>
Workflow(s)	<b>Medium</b>	<b>High</b>
System Access Controls	<b>Low</b>	<b>High</b>
Integration	<b>Low</b>	<b>High</b>
Quality Reporting	<b>High</b>	<b>Medium</b>
Patient Safety	<b>Medium</b>	<b>Medium</b>
ROI	<b>Medium</b>	<b>Medium</b>
Implementation	<b>Medium</b>	<b>Medium</b>
Assigned Security Responsibility	<b>Low</b>	<b>Medium</b>

# Work Plan Summary

<i>Activity</i>	<i>Duration</i>	<i>Start</i>	<i>Finish</i>
<b>Phase 1: Education &amp; Awareness</b>	60d	Mon 12/18/06	Mon 2/16/07
Identify Role-based educational needs	10d	Mon 12/18/06	Thu 12/28/07
Design organizational policy and procedure requirements for ACS implementation	40d	Mon 12/18/06	Mon 1/29/07
Develop curriculum	18d	Thu 12/28/07	Mon 1/15/07
Develop Education Schedule	10d	Thu 12/28/07	Mon 1/8/07
Conduct Awareness Training	30d	Mon 1/8/07	Mon 2/9/07
Assess Clinician Adoption	7d	Mon 2/9/07	Mon 2/16/07



# Project Plan

ID	Task Name	Duration	Start	Finish	% Complete	Resource Initials	% Work Complete	Comment	S
1	<b>Phase 1: Pre-Scope Planning</b>	<b>5 days?</b>	<b>Wed 12/1/04</b>	<b>Tue 12/7/04</b>	<b>100%</b>		<b>100%</b>		
2	<b>Internal Organizational Meeting</b>	<b>1 day</b>	<b>Wed 12/1/04</b>	<b>Wed 12/1/04</b>	<b>100%</b>	Client	<b>100%</b>		
3	Review Preliminary MEDITECH Work plan	1 day	Wed 12/1/04	Wed 12/1/04	100%	Client	100%		
4	Develop Project Communication Plan	1 day	Wed 12/1/04	Wed 12/1/04	100%	Client	100%		
5	Core Team Selection	1 day	Wed 12/1/04	Wed 12/1/04	100%	Client	100%		
6	<b>Initiate Core Team Meetings</b>	<b>1 day?</b>	<b>Wed 12/1/04</b>	<b>Wed 12/1/04</b>	<b>100%</b>		<b>100%</b>		
7	Develop Team Roles and Responsibilities	1 day?	Wed 12/1/04	Wed 12/1/04	100%	Client	100%		
8	Develop Project Contact List	1 day?	Wed 12/1/04	Wed 12/1/04	100%	Client	100%		
9	Develop Project Meeting Structure and List	1 day?	Wed 12/1/04	Wed 12/1/04	100%	Client	100%		
10	<b>Perform current state assessment</b>	<b>5 days?</b>	<b>Wed 12/1/04</b>	<b>Tue 12/7/04</b>	<b>100%</b>		<b>100%</b>		
11	Complete MEDITECH questionnaires	1 wk	Wed 12/1/04	Tue 12/7/04	100%	Client	100%		
12	Compile policies and procedures pertaining to computerized proces	1 wk	Wed 12/1/04	Tue 12/7/04	100%	Client	100%		
13	Compile current reports and unmet reporting needs	1 wk	Wed 12/1/04	Tue 12/7/04	100%	Client	100%		
14	Document current processes and planned improvement	1 wk	Wed 12/1/04	Tue 12/7/04	100%	Client	100%		
15	Conduct interviews to identify opportunities for improvement	1 wk	Wed 12/1/04	Tue 12/7/04	100%	MT	100%		
16	Utilize information gathered to identify opportunities for improvemen	1 wk	Wed 12/1/04	Tue 12/7/04	100%	MT	100%		
17	Present current state to steering committee	1 day	Wed 12/1/04	Wed 12/1/04	100%	Client	100%		
18	Modify project work plan if needed	1 day?	Wed 12/1/04	Wed 12/1/04	100%	Client	100%		
19	<b>Work plan Approval</b>	<b>1 day?</b>	<b>Wed 12/1/04</b>	<b>Wed 12/1/04</b>	<b>100%</b>		<b>100%</b>		
20	Final review of work plan and project charter with steering committe	1 day?	Wed 12/1/04	Wed 12/1/04	100%	Client	100%		
21	Obtain steering committee approvals	1 day?	Wed 12/1/04	Wed 12/1/04	100%	Client	100%		
22	<b>Phase 2: Phase Scope Planning</b>	<b>44 days?</b>	<b>Wed 12/1/04</b>	<b>Mon 1/31/05</b>	<b>100%</b>		<b>100%</b>		
23	<b>MEDITECH Intro Call</b>	<b>1 day?</b>	<b>Wed 12/1/04</b>	<b>Wed 12/1/04</b>	<b>100%</b>		<b>100%</b>		
24	Review Product Resource Page with Specialist	1 day?	Wed 12/1/04	Wed 12/1/04	100%	Client	100%		
25	<b>MEDITECH Spec Visit</b>	<b>3 days</b>	<b>Wed 1/5/05</b>	<b>Fri 1/7/05</b>	<b>100%</b>		<b>100%</b>		
26	Conduct Tour of Emergency Department	3 days	Wed 1/5/05	Fri 1/7/05	100%	MT	100%		
27	Review Current Workflow with MEDITECH	3 days	Wed 1/5/05	Fri 1/7/05	100%	MT	100%		
28	Demonstration of Application focusing on current workflow	3 days	Wed 1/5/05	Fri 1/7/05	100%	MT	100%		
29	Presentation of implementation plan	3 days	Wed 1/5/05	Fri 1/7/05	100%	MT	100%		
30	Collect paperwork and assessments from site	3 days	Wed 1/5/05	Fri 1/7/05	100%	MT	100%		
31	<b>Completion of Post-Spec Visit Goals</b>	<b>5 days</b>	<b>Mon 1/24/05</b>	<b>Fri 1/28/05</b>	<b>100%</b>		<b>100%</b>		
32	Enter sample dictionaries on MEDITECH input sheets	1 wk	Mon 1/24/05	Fri 1/28/05	100%	Client	100%		
33	Design tracker on graph paper	1 wk	Mon 1/24/05	Fri 1/28/05	100%	Client	100%		
34	Gather sample assessments to bring to dictionary training	1 wk	Mon 1/24/05	Fri 1/28/05	100%	Client	100%		
35	Begin to make parameter decisions	1 wk	Mon 1/24/05	Fri 1/28/05	100%	Client	100%		
36	EDM and RXM Software is delivered to Test	1 day	Mon 1/31/05	Mon 1/31/05	100%	Client	100%		
37	<b>Phase 3: Design/Build</b>	<b>#### #### #</b>	<b>Wed 12/1/04</b>	<b>Mon 8/29/05</b>	<b>100%</b>		<b>100%</b>		
38	Dictionary Training Visit at MEDITECH	4 days	Mon 1/31/05	Thu 2/3/05	100%	Client	100%		
39	<b>Dictionary Input</b>	<b>#### #### #</b>	<b>Wed 12/1/04</b>	<b>Mon 8/29/05</b>	<b>100%</b>		<b>100%</b>		
40	MIS Location	26 days?	Mon 2/7/05	Mon 3/14/05	100%	Client	100%		
41	EDM Location	26 days	Mon 2/7/05	Mon 3/14/05	100%		100%		
42	Waitlist	26 days	Mon 2/7/05	Mon 3/14/05	100%		100%		
43	Room & Treatment	26 days	Mon 2/7/05	Mon 3/14/05	100%		100%		
44	Care Level	26 days	Mon 2/7/05	Mon 3/14/05	100%		100%		

# Case Studies



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# Case 1 : Confidential Client

- Readiness Assessment and “Master Plan” for Electronic Medical Record
- Identification of Barriers to Success
  - Clinician/staff-buy in
  - Slow decision making
  - Staff retention
  - “Silos” of knowledge
- Development of Project Controls
- Documentation of current environment and desired future state
- Needs Analysis and Committee Development



## Case 2: Confidential Client

- PHA Optimization study with a focus on BMV readiness
- “Gap Analysis” comparing current state versus improvement opportunities
- Audit system production activities and identify areas for increased efficiency
- PHA Formulary management and redesign
- PHA Application workflow issues and observations
- Preparation and timeline for future project (e-MAR, BMV, CPOE)

# Questions and Open Discussion



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Thank You!

Michael Kirby

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