IMPLEMENTING S.M.A.R.T. HEALTHCARE IT PROJECTS

Presented By:

Jeff Ostrow, MSIT PMP
HCTec Director, Learning & Development

Chad Oglesbay, MBA
IS Training Program Manager,
Saint Luke’s Health System
AGENDA

- Introductions
- Getting to Know HCTec & Saint Luke’s Health System
- General Use Case and Business Benefits
- S.M.A.R.T. Technology
- Q & A
TODAY’S PRESENTERS

Jeff Ostrow, MSIT PMP
- Oversees EMR training development & delivery services
- Training Leader at Johns Hopkins for 14 years with the last five years as the Sr. Training Manager for the entire Epic training program for Johns Hopkins Medicine
- Expert in helping the organization reduce costs, improve clinical outcomes, and reduce medical errors by developing comprehensive Epic training models
- Organizes, manages and implements programs to support training and organizational development
- PMP certified since 2010 as well as Epic Ambulatory and Security Certified
- Bachelor’s of Science from the University of Baltimore and a Master’s of Science and Instructional Technology from Towson University

Chad Oglesbay, MBA
- Oversees Information Systems Training and Epic Training programs for Saint Luke’s Health System in Kansas City
- Key user and pilot testing resource for HCTec’s SMART application
- Expert in helping Saint Luke’s Health System identify opportunities to improve training and business operations and for developing programs that address specific performance gaps.
- Utilizes HCTec’s training and go-live services for Epic implementations
- Bachelor’s of Arts, Geography with emphasis in Computer Science from the University of Missouri-Columbia and a Masters, Business Administration from Webster University
WHO IS HCTEC?

Who We Are
HEALTHCARE. TECHNOLOGY. PEOPLE.

Our Mission is to discover, develop, and deliver dynamic people and innovative solutions to enhance healthcare services and patient care.

Our EMR Footprint
- HCTec has been working with EMR since 2010
- Epic approved consulting partner
- Supported over 100 EMR implementations
- Completed 39 EMR Training & 54 EMR Go-lives
- Corporate offices in Nashville, Tampa, Atlanta & Steamboat Springs

What We Offer

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<th>CONSULTING SERVICES</th>
<th>SOLUTION SERVICES</th>
<th>MANAGED SERVICES</th>
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<td>90</td>
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<tr>
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<td>54</td>
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<td>EMR Training Projects</td>
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Saint Luke’s Health System
Saint Luke’s Health System includes 10 hospitals and campuses across the Kansas City region, home care and hospice, behavioral health care, dozens of physician practices, and more.

Place of Performance:
Kansas City, MO

Period of Performance:
January 2015 – Present

HCTec Resources:
28 Credentialed Trainers
222 ATE Support

Point of Contact:
Chad Oglesbay,
IS Training Program Manager
**Scope**
Implementation of a sizable healthcare IT project requiring extensive training and support programs for thousands of end users.

**Management Goals**
- Recruit Quality Resources
- Onboard Resources Efficiently
- Manage Resources & Logistics Effectively
Planning and Analysis

- Define onboarding requirements
- Establish travel & logistics policy and plan
- Integrate and implement technology
- Introduce HCTec training management to client team
Types of Quality Resources

**Credentialed Trainers (CTs)**
Choose a partner with extensive experience who has the ability to:
- Select from a database of 1,500 CTs
- Ensure CTs have current background checks, immunizations, and compliance documentation completed prior to engagement
- Require all CTs to have been previously credentialed in 1 or more application.

**Go-live At The Elbow Support (ATEs)**
Choose a partner with extensive experience who has the ability to:
- Select from over 1,000 5 star certified ATEs
- Ensure ATEs have current background checks, immunizations, and compliance documentation completed prior to engagement
- Redeploy proven resources
- Require all ATEs to have previous experience in supporting end users in specific applications
Dealing with Project Constraints?

Required to Reduce Budget

Need Quality Resources

Plan for Post Go-Live Resources

Innovative RT Program

Recruit
- Local candidates
- Adult education or EMR prior experience, hospital background preferred
- Must pass RT assessments, profiles, and tests

Train
- Attends credentialing at no cost to organization
- Panels with other members of training class

Activate
- Once panels passed, able to be utilized as “CT”
- Reduced bill rate and no travel expenses
- Similar to CTs, typically utilized during GoLive
Accurate Recruitment Concerns?
Ensure that a thorough walkthrough is performed for EVERY facility, floor and location

Evaluation criteria includes:
- Facility layout (Beds, rooms, suites)
- Anticipated Super User staffing
- Printer locations
- Average daily census
- Average daily staffing
- Physician rounding times
- Hours of Operations
- Overlooked Areas

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<th>SU</th>
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<th>Cross</th>
<th>SU</th>
<th>SU-N</th>
<th>Desks</th>
<th>Willis</th>
<th>HIM</th>
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RECRUIT QUALITY RESOURCES

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ONBOARD RESOURCES EFFICIENTLY

Utilize dashboards and video interviews to select resources.

Require all resources to complete LMS Courses (i.e. HIPAA, Customer Service).

Ensure all resources complete compliance requirements (i.e. vaccinations, immunizations).

Evaluate RT requirements (i.e. risk mitigation, budget management).

Onboarding Process
ONBOARD RESOURCES EFFICIENTLY

Too Much To Do, Too Little Time?

Ensure you choose a partner who have the ability to:

- Manage all onboarding and travel logistics for the client.
- Pay and managed travel through a corporate travel partner with 24/7 support for our professionals
- Ensure that all resources will have current records for immunizations, drug screens, background checks and education verifications
- Provides a fully dedicated team to managed onboarding, recruiting & screening, travel management and payroll/invoicing
- Managed over 800+ consultants nationwide on a weekly nationwide in addition to training and Go-live resources
MANAGE RESOURCES & LOGISTICS EFFECTIVELY

Bringing It All Together to Ensure Success

Planning
- Needs Analysis
- Project Planning
- Leadership Updates

Delivery
- Resource Orientation
- Credentialing Support
- Leadership Updates

Development
- Strategy Documents
- Curriculum Mapping
- Leadership Updates

Design
- Schedule Mgmt
- Resource Mgmt
- Leadership Updates

Collaboration is Continuous

Communication is Key
Keys to Success

Ensure you have the following in place:

- Experienced resource and logistics management team
- Collaboration with client training and project management leadership
- Onsite leadership overseeing resources and logistics
- Clear escalation process
- CT team leads with senior experience overseeing CTs and RTs
- ATE team leads with senior experience overseeing ATEs
“Houston, We Have A Problem!”
Common Tools for Manual Schedule Creation

- Wall Charts
- Post It Notes
- Excel Spreadsheets
- SharePoint
- Outlook
- Access Database
- LMS
Common Manual Schedule Creation Process

1. Determine the number of end users per course
2. Create a wall calendar using Post-It easel paper
3. Use smaller Post-It notes to place classes on the calendar
4. Draft Schedule Achieved?
   - Yes: Use smaller Post-It notes to place CT’s on the calendar
   - No: Reconfigure the course Post-It notes as needed
5. Final Schedule Achieved?
   - Yes: Manually enter schedule into the LMS
   - No: Excel Schedule
6. Final Schedule Achieved?
   - Yes: Reconfigure the CT Post-It notes as needed
   - No: Final Schedule Achieved?

RECONFIGURE THE COURSE POST-IT NOTES AS NEEDED

RECONFIGURE THE CT POST-IT NOTES AS NEEDED
Common Manual Schedule Creation Issues

- Limited accessibility
- Limited visibility
- Time Consuming
- Tedious Data Analysis
- Data Volatility
- Process Redundancy
- High costs
- Hard to use
Utilize the Scheduling Management And Resource Technology (S.M.A.R.T.) application to:

- Eliminate Scheduling inefficiencies
- Reduce high costs
- Limit resources
- Eliminate Data Entry Errors
- Utilize a cloud-based web application
- Fully integrate with any LMS
- Easily schedule and assign trainers
SCHEDULE CREATION OPTIONS

1. User Created Schedule
   - Drag and Drop Schedule Creation by Course
   - Identify Specific Days of Training
   - Schedule Blackout Dates
   - Fully Dynamic Data Analysis using Dashboard and Reports

2. System Created Schedule
   - Application and/or Courses Offered on Specific Days or Time
   - Application and/or Courses Offered in Specific Classrooms
   - Identify Break Durations Between Offerings
   - Schedule Blackout Dates

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SMART ROLES AND PERMISSIONS

Organization Administrator
Access to All Functionality for the User’s Organization

PTs and CTs
View and Edit Schedules, View Dashboard and Reports

View Only
View Schedules, Dashboard and Reports
# SMART SCHEDULE TEMPLATE

## Mar 26 – Apr 1, 2017

<table>
<thead>
<tr>
<th>Time</th>
<th>Course Title</th>
<th>Room</th>
<th>Instructor</th>
<th>Location</th>
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<td>Charge Captain, Clarke J.</td>
<td>Classrooms 10</td>
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<td>Spanish Way</td>
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<td>Psychologist 100, Johnson S., Clarke J.</td>
<td>1405 Maryland Way Classroom 10</td>
<td></td>
<td>Spanish Way</td>
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<tr>
<td>12:15 PM - 3:45 PM</td>
<td>Secretary 100, Johnson S.</td>
<td>1405 Maryland Way Classroom 11</td>
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<td>Spanish Way</td>
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<td>5:30 PM - 9:30 PM</td>
<td>Behavioral Health Psychiatricist 100, Johnson S.</td>
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<td>Spanish Way</td>
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<td>Nurse Traeger 100, Johnson S.</td>
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<td>Primary Care Provider 100, Johnson S.</td>
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<td>Spanish Way</td>
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<td>Clinic Manager 300, Rocker J.</td>
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<td>Nurse 100, Rutter, S.</td>
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<td>Spanish Way</td>
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<td>Front Desk 100, Rutter, S.</td>
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<tr>
<td>8:00 AM - 12:15 PM</td>
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<td>Behavioral Health Psychiatricist 100, Chang J.</td>
<td>Franklin Hospital Campus</td>
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</table>

**Schedule Template**

**Courses**
SMART DRAG AND DROP TECHNOLOGY

<table>
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<tr>
<th>Application Color</th>
<th>Course Name</th>
<th>Course Duration</th>
<th>Recommended Sessions</th>
<th>Scheduled Sessions</th>
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<tr>
<td>6 hrs. 119 48</td>
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1. Application Color
2. Course Name
3. Course Duration
4. Recommended Sessions
5. Scheduled Sessions
1. Application Color
2. Course Name
3. Course Duration
4. Recommended Sessions
5. Scheduled Sessions
### SMART DATA ANALYSIS

**Export File**
- **Back to Schedule**
- **Export**

**Filters**
- All Courses
- All Applications
- All Locations
- All Classrooms
- All Trainers
- "Clear"

**Search**
- **Search**
- **From Date**
- **To Date**

#### Page Size
- 100

<table>
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<tr>
<th>Course</th>
<th>Application</th>
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<th>End</th>
<th>Classroom</th>
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<th>Duration</th>
<th>Primary CT</th>
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SMART LMS INTEGRATION

S.M.A.R.T. Schedule Data

LMS Specifications File

Managing Schedules

Manage Enrollments
FUTURE FEATURES

1. Automated Trainer Assignments
2. More Efficient User Interface
3. Improved Reporting Capabilities

S.M.A.R.T. Application Additional Features

Virtual Training Program
Delivering Epic training to learners using virtual technology offers a cost-effective, interactive learning environment easily accessible anywhere, anytime.

Realized Benefits of Virtual Training

CONVENIENT AND ADAPTIVE TO TODAY’S WORKING STYLE

FOCUSED LEARNING ENGAGEMENT

RESULTS-ORIENTED OUTCOME IN LESS TIME

REDUCTION IN COSTS (TIME & EXPENSES)

INCREASE IN REVENUE (MORE TIME WITH PATIENTS)