

Project Management for Critical Access Hospitals

Provided By:
The National Learning Consortium (NLC)

Developed By:
Health Information Technology Research Center (HITRC)
Carolyn P. Hartley, MLA, CHP



National Learning Consortium

- The National Learning Consortium (NLC) is a virtual and evolving body of knowledge and resources designed to support healthcare providers and health IT professionals working towards the implementation, adoption and meaningful use of certified EHR systems.
- The NLC represents the collective EHR implementation experiences and knowledge gained directly from the field of ONC's outreach programs ([REC](#), [Beacon](#), [State HIE](#)) and through the [Health Information Technology Research Center \(HITRC\)](#) Communities of Practice (CoPs).
- The following resource can be used in support of the [EHR Implementation Lifecycle](#). It is recommended by “boots-on-the-ground” professionals for use by others who have made the commitment to implement or upgrade to certified EHR systems.

EHR Implementation Lifecycle



The material in this document was developed by Regional Extension Center staff in the performance of technical support and EHR implementation. The information in this document is not intended to serve as legal advice nor should it substitute for legal counsel. Users are encouraged to seek additional detailed technical guidance to supplement the information contained within. The REC staff developed these materials based on the technology and law that were in place at the time this document was developed. Therefore, advances in technology and/or changes to the law subsequent to that date may not have been incorporated into this material.

Description & Instructions

- The Project Management for Critical Access Hospitals presentation is intended to aid providers and health IT implementers with EHR Implementation. It can be used to build consensus among stakeholders, understand a CAH implementation or system upgrade, manage the cultural and resistance factors, manage multiple vendors and their schedules, and identify change management style/preference.
- This resource includes essential project management tips and tools to effectively implement and manage projects.

You Are Here! Case Study

- Critical Access Hospital (CAH)
 - Capital Improvement Plan (CIP) funds were used to upgrade the network, provide additional portable notebooks, and install system upgrades to help meet Meaningful Use. In testing the upgrades seemed to work, but today, medication orders are disappearing and lab values inconsistently misreported. Due to contaminated vials, the nurses have been asked to generate duplicate blood draws. Patients are not happy.



- Triage these problems and determine solutions.

Session Objectives

Upon completion of this session, you will be able to:

- Demonstrate how to build consensus among multiple stakeholders
- Understand how to oversee a CAH implementation or system upgrade between multiple departments
- Manage the cultural and resistance factors
- Manage multiple vendors and their schedules
- Identify your change management style/preference

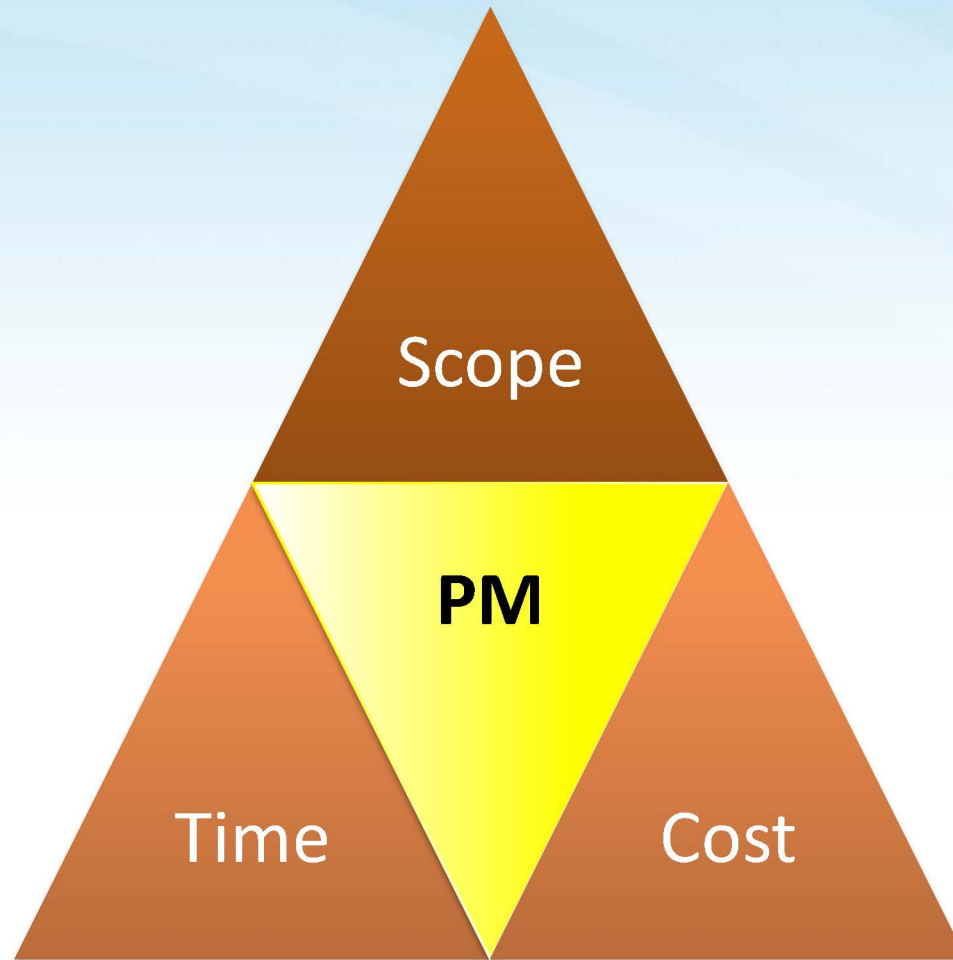
QUALITIES OF AN EHR PROJECT MANAGER

- Intuitive listener and observer
- Persistent about documentation
- Organized for a purpose
- Delegates and manages details
- Motivational and focused on deadline
- Risk manager, anticipates fires
- Thick skinned, broad shoulders
- Consensus builder – knows stakeholders

Common Responsibilities for PM

- Prepare
 - Identify stakeholders, their needs and goals
 - Assess what you have, what you need
- Project Scope
 - What needs to be done?
 - What will get in your way?
- Project Schedule / Implementation
 - Choose a PM system that identifies deliverables, tasks, duration, and resources to complete tasks
- Supporting Plans
 - Resources, Human and Technical
 - Communications
 - Risk management

TRIPLE CONSTRAINT



Identify the Stakeholders – Discussion

- Who are the stakeholders
 - Internal
 - External
- What's in it for them?
- What are their risks / benefits?
- What's in it for the CAH?

Stakeholder Discussion – Flip Chart

Stakeholders	What do they want? What will they give up?	Risks/Benefits
Employed Providers		
Hospital administration		
Departments		
Ancillary Services		
Local physicians		
Payers		
Patients		

Project Manager's Toolkit

- Essential project manager tools
 - Project Charter
 - Agree and post in visible location
 - Project Management Plan for CAHs
 - Project Scope
 - Work Breakdown Structure
 - Communications Plan
 - Budget management
 - Resource Requirements Plan
 - Training Plan
 - Risk Management Plan
 - Timeline / Tool

Critical Access Hospital Roadmap

Assess

Plan

Implement

Evaluate

- Assessment**
- Current state analysis
 - Identify goals
 - Interoperability, workflow, infrastructure, privacy & security

- Vendor selection**
- Education
 - Contract guidance
 - Timeline

- Privacy and Security**
- Policies and procedures
 - Training

• Security risk assessment

- Infrastructure**
- Capacity planning
 - Deployment

- Interfaces / interoperability**
- Coordinate resources

Workflow Redesign

- Workforce Training/Recruitment**
- Identify needs and opportunities
 - Reallocate assignments

- Data integration /validation activities**
- Order sets
 - LOINC mapping

• CPOE
• Rx Formulary

System Configuration/Testing

- Remote connection
- Configuration
- Total system check

Implementation (Training/go-live)

- Project management
- Training preparation
- Schedule

• Go-live method
• Support plan
• Readiness assessment
• Go-live



Post Go-live Assessment/Optimization

- Optimization (workflow, infrastructure, privacy & security, workforce)
- Support transition
- Register for Medicare incentive program

Meaningful Use

- CMS attestation
- ONC attestation

National Learning
www.HealthIT.gov

Quality Improvement

- Preparation for Stage 2 & 3 MU
- HIE connectivity
- Monitor compliance (MU objectives)

Exercise: Manage Timetable

Exercise: Manage Timetable

- Description
 - Using the timeline, map the 25 items into a CAH implementation timeline.
- Mode of Participation – Table with feedback to larger group
- Time Allotted – 20 minutes
- Directions
 1. Review the cards
 2. Map them into a CAH implementation timeline
 3. Share findings with larger group

Observations

- How did your group's timeline differ from other groups?
- What were some of the interdependencies?

Is Change Management Part of Project Management?

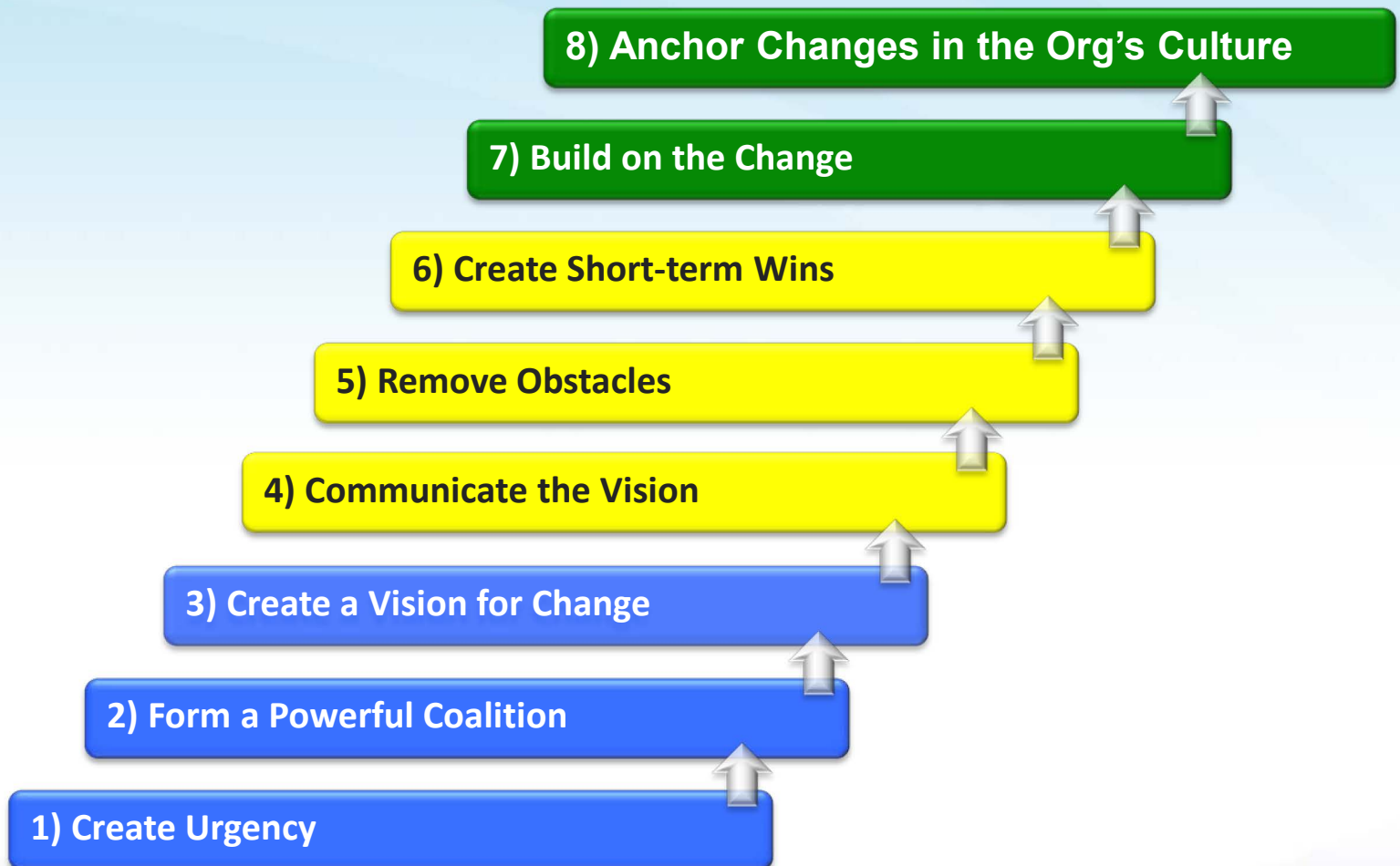
- Change Management
 - Builds on Assessment, Strengths and Limitations
- Project Management Identifies
 - What has to be done?
 - Who has to do it?
 - How much will it cost?
 - What are our risks?
 - Where will we need help?

Project Management Approaches to Managing Change

- Plan Do Study Act
 - W. Edwards Deming “Survival is not mandatory.”
- PMBOK – Project Management Body of Knowledge
 - Six Sigma
- Kotter’s 8-Step Plan
 - Harvard University

IT’S ABOUT PEOPLE, NOT TECHNOLOGY

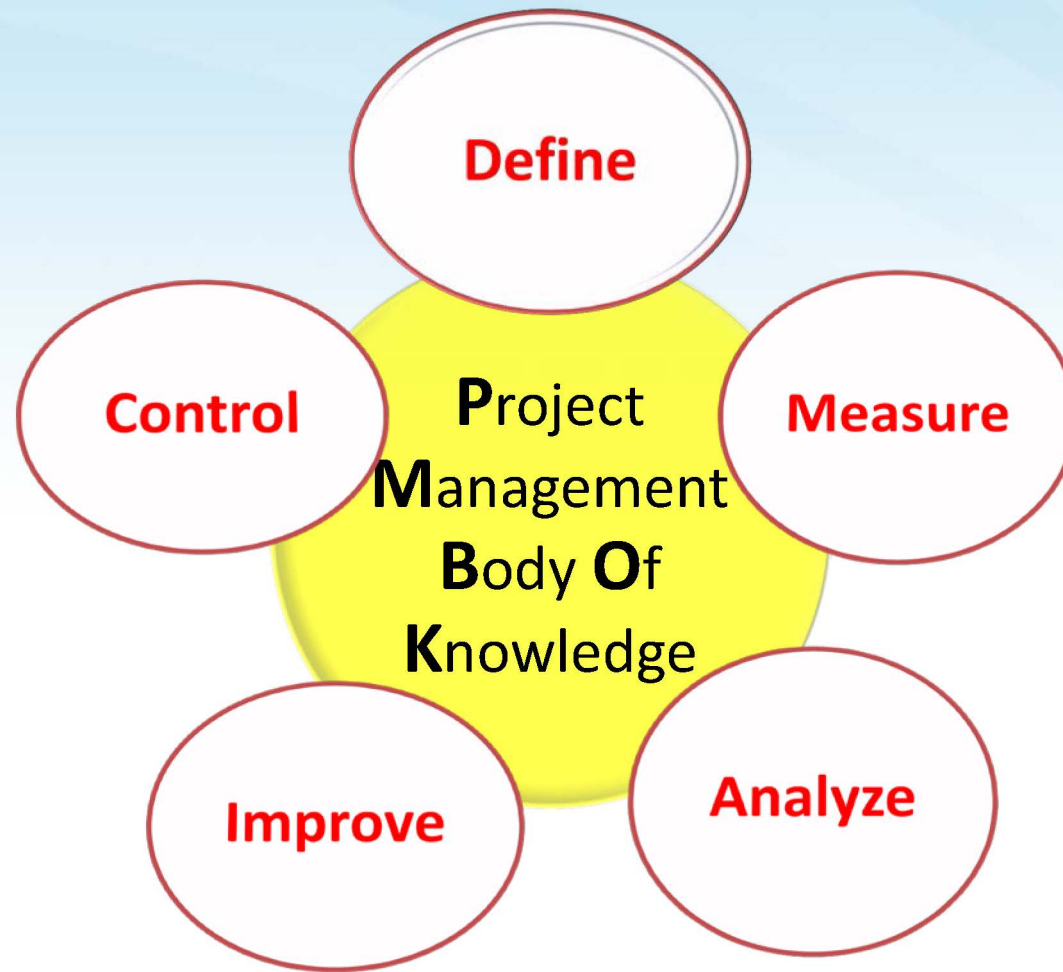
Kotter's Eight Step Process



Demining Principles for Project Managing Change



SIX SIGMA - PMBOK



Transition to Process – Aware Lean Methodology (SIX SIGMA)

Productivity

Encounter profitability
Additional resources?
Focus switch from ROI to efficiency
Activity-based measurements

Usability

Who says it's easy to use?
Number of clicks to accomplish task
In Certification process
Currently adding time to documentation

Workflows

Driven by Clinician, not programmer
Analysis drives strategy

- At point of care
- Between care points

Strategy drives implementation
Data migration

Culture

Tool: Identifying Processes/ Tasks Halting the Implementation

Category	Areas needing strengthening	Cause / Effect	Responsible Party
Admitting	Insufficient information captured	Charges denied Physician has inadequate info	

Project Charter

- Establishes formal authority for the project
- Defines goals of the project
- Documents requirements to meet stakeholder needs and expectations
- Identifies project leadership/decision makers
- Provides framework for project decisions

Exercise: What Would You Do If...

Exercise: What Would You Do If...

- Description
 - Determine solutions to the problems in the given scenario using the tools provided
- Mode of Participation – Table with feedback to larger group
- Time Allotted – 20 minutes
- Directions
 1. Review the given scenario.
 2. Analyze and determine the effect on the project.
 3. Document an action plan.
 4. Share findings with larger group.

Lessons Learned

- Holding people accountable is a key success factor
- Communicate, communicate, communicate
- Beware of “scope creep”
- “Stuff” happens and you have to adjust
 - If there is no plan in place, then you don’t know what to adjust!

SESSION REVIEW

In this session we reviewed:

- Essential project management tools and how to use them for effective project implementation
- How to manage multiple stakeholders, staff differences, outside and internal influences as project manager for updates, changes and implementations

