

EKOLU & Associates, LLC

Health Information Systems Management

Lessons Learned



Lessons Learned

‘History is a giant. The present is a gnome on the giant’s shoulders; as long as the gnome is able to keep his place, he can see farther than the giant.’

A High School history teacher in Mighty Ducks III

Lessons Learned

- Start planning early.
- Keep CMS in the loop (on everything).
- Document staffing needs, roles, and responsibilities.
- Decide how the existing operation will be supported.
- ‘Rushing produces unintended consequences.’

Procurement

- Assign full time staff.
- Educate the team.
- Identify and verify requirements.
- Talk to CMS and other States.
- Get outside help.
- 4 to 6 months to write the APD and RFP.
- 2 to 3 months for CMS review and approval of the APD and RFP.
- Generate a Procurement Evaluation Plan.

Procurement Evaluation

- Give vendors 3 to 4 months to respond.
- Give the evaluation team 2 to 3 months to study and evaluate proposals.
- Prepare for the bidders conference.
- Set up the web site and procurement library ahead of time.
- Invite questions; go over concerns and questions with the team.
- Consider requests for more time.

Build Consensus

- Establish evaluation team meeting schedules.
- Review individual notes with the group.
- Discuss the scoring process.
- Prepare scores that represent the recommendation of the evaluation team.
- Assign specific resources to collect and summarize the evaluation teams' scores.
- Document all recommendations.

Choosing a DDI Contractor

- Remember they do this for money.
- Require an oral presentation.
- Consider requiring demonstrations.
- Visit their site.
- Interview the proposed management team.
- Talk with their references.
- Plan and negotiate a change.

Contract Negotiations

- Choose a lead negotiator.
- Review good negotiation practices.
- Define what you want in the contract.
 - Standard deliverable formats.
 - Standard review times.
 - Regular status reporting.
 - Performance metrics.
- Meet with the State negotiation team.
- Listen to the contractor.

Contract Negotiations

- Avoid collective amnesia.
- Define consensus.
- Track everything you give up.
- Back up the lead negotiator.
- Establish change control procedures.
 - Write them down.
 - Assign owners.
- Revise the project work plan.

Celebrate Accomplishments



Getting Started

- Organize a meet and greet.
 - High level State and contractor leads need to attend and to welcome their work teams.
 - Review the goals.
 - Review the timeline.
 - Schedule celebrations.
- Establish a common library - website
 - APD, RFP, Contract.
 - Standards documents.
 - Deliverable templates.
 - Work Plans

Getting Started

- Set up a common work area.
- Make sure the work space and communications are ready.
- Provide some private space.
- Establish a meeting schedule.
 - Define adequate meeting preparation.
 - Define meeting record requirements.
 - Define change control procedures.

Ongoing Work

- Establish contractor and State staff owner-counterparts.
- Regular mandatory team meetings.
- Reject unacceptable deliverables immediately.
- Everybody does a status report and tracks their time.
- Update the work plan.

Organizing The Team

- Identify needed roles and skills.
- Build and share the skills inventory.
- Review and update the team roles and responsibilities.
- Orient the team to your management style.
- Gather lessons learned.
- Set the team meeting schedule.
- Anticipate turnover.

Serving The Project

- No one is waiting for an assignment.
- Work on the items in the RFP.
- Anticipate change, propose solutions.
- The Golden Rule:
‘Yes, and as soon as I check with (*leaders name*) I will give you a sense for how long that might take.’

Serving The Project

- Remember the Golden Rule.
- Study the RFP, know it by heart.
- Establish a party line for the project and its current status.
- Identify problems and mistakes; always bring a proposed solution; options are nice.

Planning

- Pull out the calendar, propose a schedule.
- Finalize the management guides.
- Contact needed stakeholders.
- Adjust the schedule.
- Track delays.
- Consider contingencies.
- Test the water.
- Make sure the facilities are still ready.

Requirements Verification

- Gather-prepare materials.
- Sell the transfer system; demonstrate it.
- Refer to the RFP.
- Record the JAD sessions.
- Stakeholder review.
- Track all issues.
- Verify issue resolution.

Design

- Spend time; ask more questions.
- Review proposed modules with the stakeholders.
- Track issues.
- Resolve issues.
- Test the water.
- Update the work plan.

Construction

- Practice good configuration management.
- Stay in the Unit Test environment.
- Use naming conventions.
- Build the data dictionary.
- Prepare re-useable test data.
- Verify results against the requirements.
- Adjust the work plan.

Conversion

- Identify source systems.
- Establish a team to address each source.
- Produce a conversion plan.
- Decide what new data is needed (HIPAA).
- Use source data whenever possible.
- Document data translations.
- Test, test, test.

Testing

- Build the ITF.
- Put one person in charge.
- Document expected results.
- Iterate the test data; build on it a little at a time.
- Set up the test schedule.
- Separate SIT from UAT.

Implementation

- Generate a separate implementation plan.
- Look at contingencies.
- Staff the phones.
- Celebrate going live.

Post Implementation

- Collect the output.
- Run the year end processes.
- Keep track of user issues and stakeholder queries.
- Identify change control priorities.
- Document lessons learned
- Store the library somewhere safe.

Prepare for Procurement

- Remember lessons learned!
- Remember where the library is.