Phase Gates in Healthcare

September 28th, 2019

David Bobrow

Agenda

- Welcome and Introductions
- CHOC Children's Overview
- Phase Gates at CHOC
  - Basics
  - In-Depth
- Phase Gate Process Demo
- Why are Phase Gates successful at CHOC?
- Questions

CHOC Children's Overview

- Founded in 1964. Walt Disney and Walter Knott had a concept for a Children's Hospital in Orange County
- 2 Hospitals
  - CHOC Children's Hospital (Orange) - 312 Bed Facility
  - CHOC Children's at Mission Hospital – 50 Bed Facility
- Opened Bill Holmes Tower in 2013 that contains Surgery, Radiology, Laboratory, and ER Departments.

CHOC Children's Hospital

CHOC Children's Overview

- Numerous Outpatient Primary and Specialty Clinics
- CHOC Children's is affiliated with UCI Medical School as well as SOCPA, SeaView, Los Alamitos Pediatric Medical Group, Pediatric and Adult Medicine Inc., Pomona Valley Hospital, and PIH in Whittier.
- Number of visits in 2018
  - Inpatient = 12293
  - Outpatient = 237,734
  - ED = 89013

CHOC Information Services Growth

- 12 employees in 2001
- 50+ employees in 2007
- 110+ employees in 2019
- 286 Applications Supported

- CHOC PMO Evolution
  - 2 PMs in 2007
  - 8 PMs in 2019
- All CHOC PMs have PMPs

Phase Gates at CHOC

Phase Gates at CHOC - Basics

- What is the definition of Phase Gates in Healthcare Projects?
  - This is to verify that the project is going through each of the phases of the project lifecycle.
- Why does this process occur?
  - CHOC PMs are responsible for providing the required project documentation
  - CHOC ISD (Information Services Department) management has basic knowledge of every project going on in the PMO portfolio.
  - Ensure project resource availability

Phase Gates at CHOC - Basics

- Established formal process in June 2018
- The PMO manager leads the Phase Gate meeting
- CHOC ISD Leadership meets once a week for a ½ hour.
- Project Manager has to submit required documentation 1 week in advance.
- The participants are as follows:
  - Chief Technical Officer
  - Associate Chief Technical Officer
  - Chief Information Security Officer
  - Clinical Informatics Exec. Director and Supervisor
  - Revenue Cycle Supervisor
  - Business Intelligence Director and Manager
  - Operations Support Supervisor
  - Technical Services Managers
  - ISD Customer Service Director

Phase Gates at CHOC – In Depth

- Phase Gate consists of 6 phases:
  - Phase 1 – Planning
  - Phase 2 – Design
  - Phase 3 – Build/Unit Testing
  - Phase 4 – Integrated Testing
  - Phase 5 – Deployment Go-Live
  - Phase 6 – Project Closure

Phase 1 – Requirements for Planning Phase

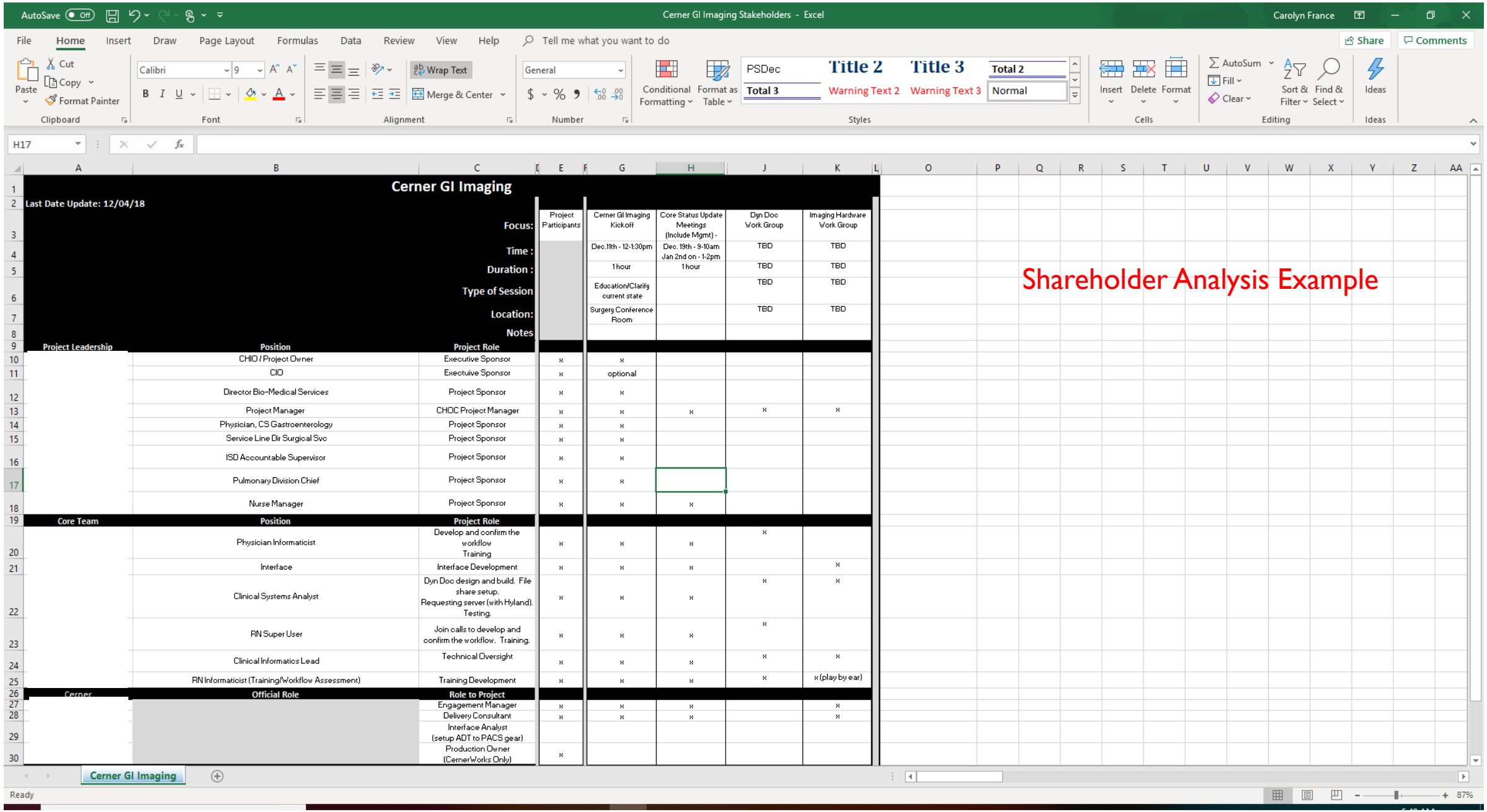
Control Activity	Control Description
Conceptual Technical Design Agreement	Sign off by ARC team
Budget Estimate (High Level)	Non Due Diligence Budget Estimate
Resource Assigned	Slotted through Intake process
Signed Legal Contract	Signed contract with BAA
Signed Charter	Charter with Scope of Work
Project Plan (Preliminary)	Develop Preliminary Project Plan and Publish to Clarizen
Stakeholder Analysis	Individuals who are invested in the project
Kick Off	Hold Kickoff Meeting
Governance/Project Meetings	Scheduled Governance Meetings
Project Team Meetings	Scheduled Project Team Meetings
Project Resources Available	☐ Yes ☐ No

CHOC PMO PROJECT CHARTER

Project Name: Cerner GI Imaging

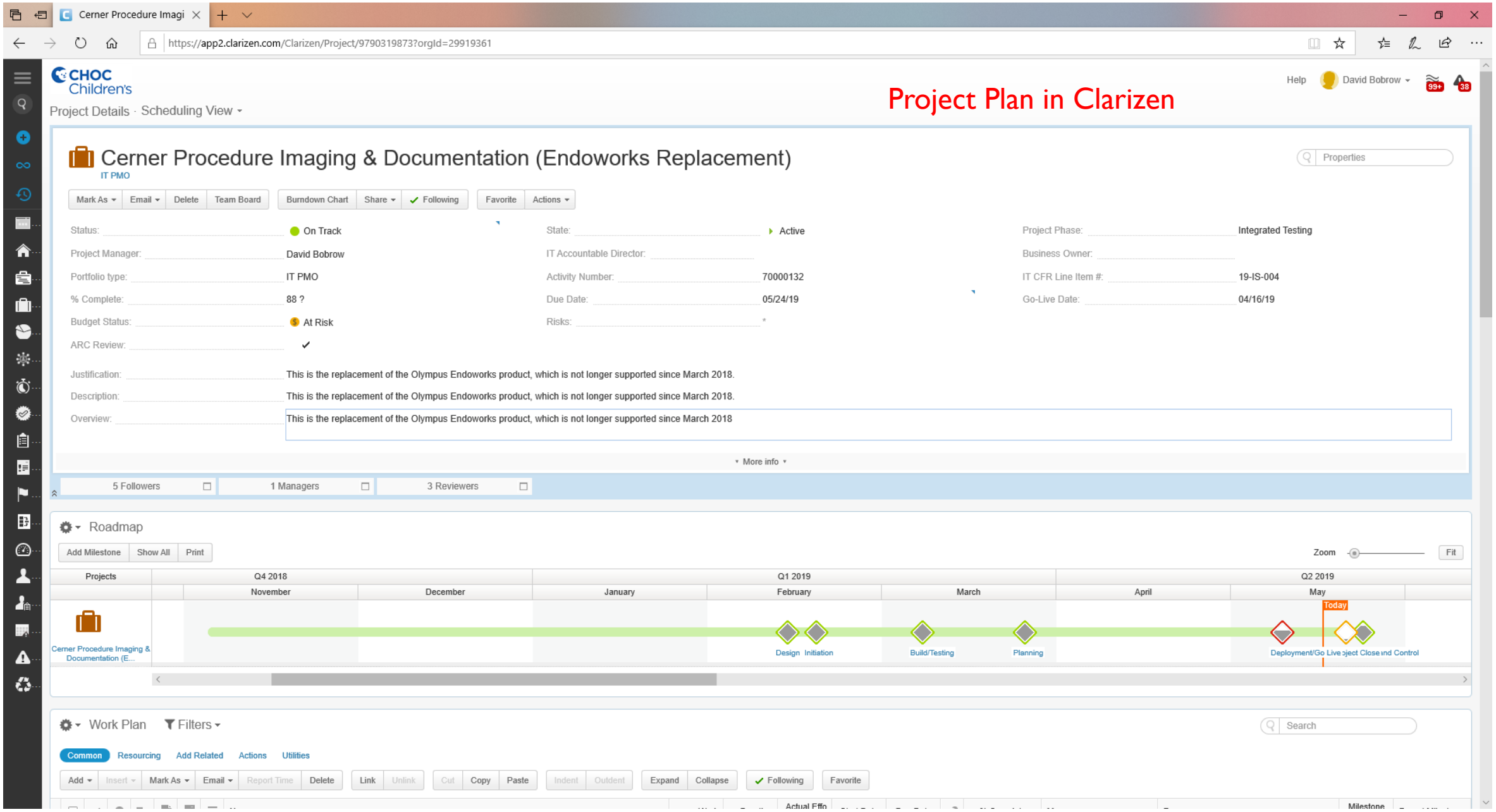
Project Leader: David Bobrow	**Budget/Timeline:** Budget • $43,178 provisioned • TBD estimated to complete Timeline • Initiated: 12/18/2016 • Kick-off: 12/11/2018 • Go-live: mid-late 3/2019 • Close: mid-late 4/2019
Business Case: • Endoworks has no longer been supported by the vendor since March 2018. • Will bring procedure documentation in line with house-wide standard • Images captured stored in Cerner CAMM	**Goal Statement:** • Successful implementation of Cerner GI (Procedure) Imaging System
Project Scope, Constraints, Assumptions: Constraints/Assumptions • CHOC, Cerner, and Hyland Resources are available for the project. • Issue log created and kept current • Resolution of issues is done in a timely manner. Scope/Objectives • Set up Patient Demographics interface from Cerner Millennium to Hyland Video Capture Device • Set up an imaging interface from Hyland to Cerner Millennium • Set up Procedure Imaging Dynamic Documentation • Images captured stored in Cerner CAMM	**Team/Stakeholders:** Project Manager Assigned • David Bobrow Owner/Champions • • • Responsible/Project Leaders • • Subject Matter Experts • • • • • • •

Approvals:	Date
Chief Health Information OfficerEmployee [Digitally Signed]	12/17/2018 8:38:15 AM
Project Executive Sponsor	
Supervisor ClinicalApplication [Digitally Signed]	12/14/2018 12:37:42 PM
IT Accountable Director	
David Bobrow, Project Manager II [Digitally Signed]	12/14/2018 12:17:21 PM
Project Manager	

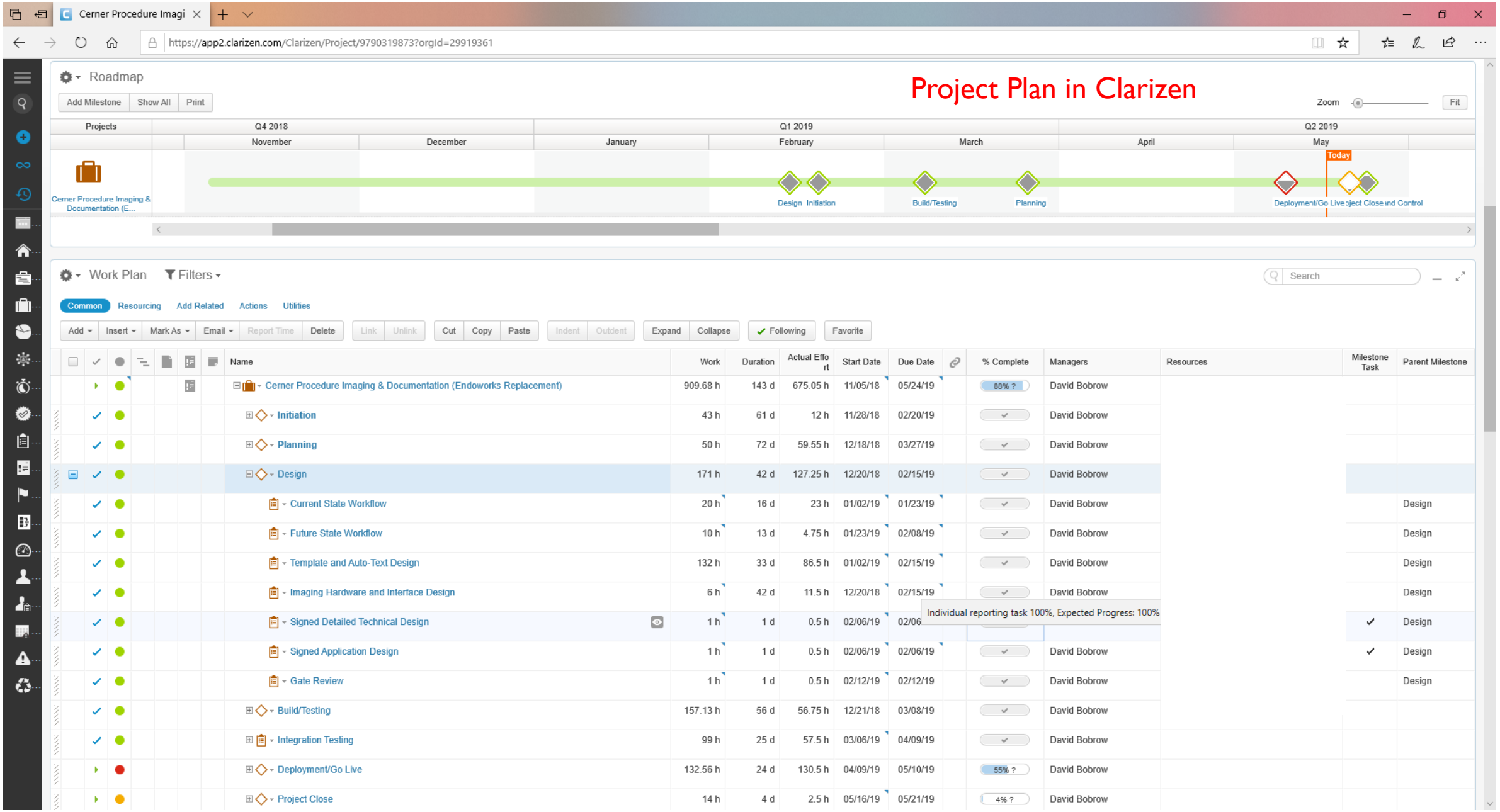

AutoSave
Cerner GI Imaging Stakeholders - Excel
Carolyn France
File Home Insert Draw Page Layout Formulas Data Review View Help
Tell me what you want to do
Share Comments
Cut Copy Format Painter Paste
Calibri 9
Wrap Text
Merge & Center
General
Conditional Formatting
Format as Table
PSDec
Title 2
Title 3
Total 2
Total 3
Warning Text 2
Warning Text 3
Normal
Insert Delete Format
AutoSum Fill Clear
Sort & Filter Find & Select
Ideas
Clipboard Font Alignment Number Styles Cells Editing Ideas
H17
Cerner GI Imaging
Last Date Update: 12/04/18
Focus:
Time :
Duration :
Type of Session
Location:
Notes
Project Participants
Cerner GI Imaging Kickoff
Core Status Update Meetings (Include Mgmt) -
Dyn Doc Work Group
Imaging Hardware Work Group
Dec.11th - 12-1:30pm
Dec. 19th - 9-10am
Jan 2nd on - 1-2pm
TBD
1 hour
Education/Clarify current state
Surgery Conference Room
Project Leadership
Position
Project Role
CHIO / Project Owner
Executive Sponsor
CIO
Exectuive Sponsor
optional
Director Bio-Medical Services
Project Sponsor
Project Manager
CHOC Project Manager
Physician, CS Gastroenterology
Service Line Dir Surgical Svc
ISD Accountable Supervisor
Pulmonary Division Chief
Nurse Manager
Core Team
Physician Informaticist
Develop and confirm the workflow
Training
Interface
Interface Development
Clinical Systems Analyst
Dyn Doc design and build. File share setup.
Requesting server (with Hyland).
Testing.
RN Super User
Join calls to develop and confirm the workflow. Training.
Clinical Informatics Lead
Technical Oversight
RN Informaticist (Training/Workflow Assessment)
Training Development
x (play by ear)
Cerner
Official Role
Role to Project
Engagement Manager
Delivery Consultant
Interface Analyst
(setup ADT to PACS gear)
Production Owner
(CernerWorks Only)
Shareholder Analysis Example
Cerner GI Imaging
Ready
87%

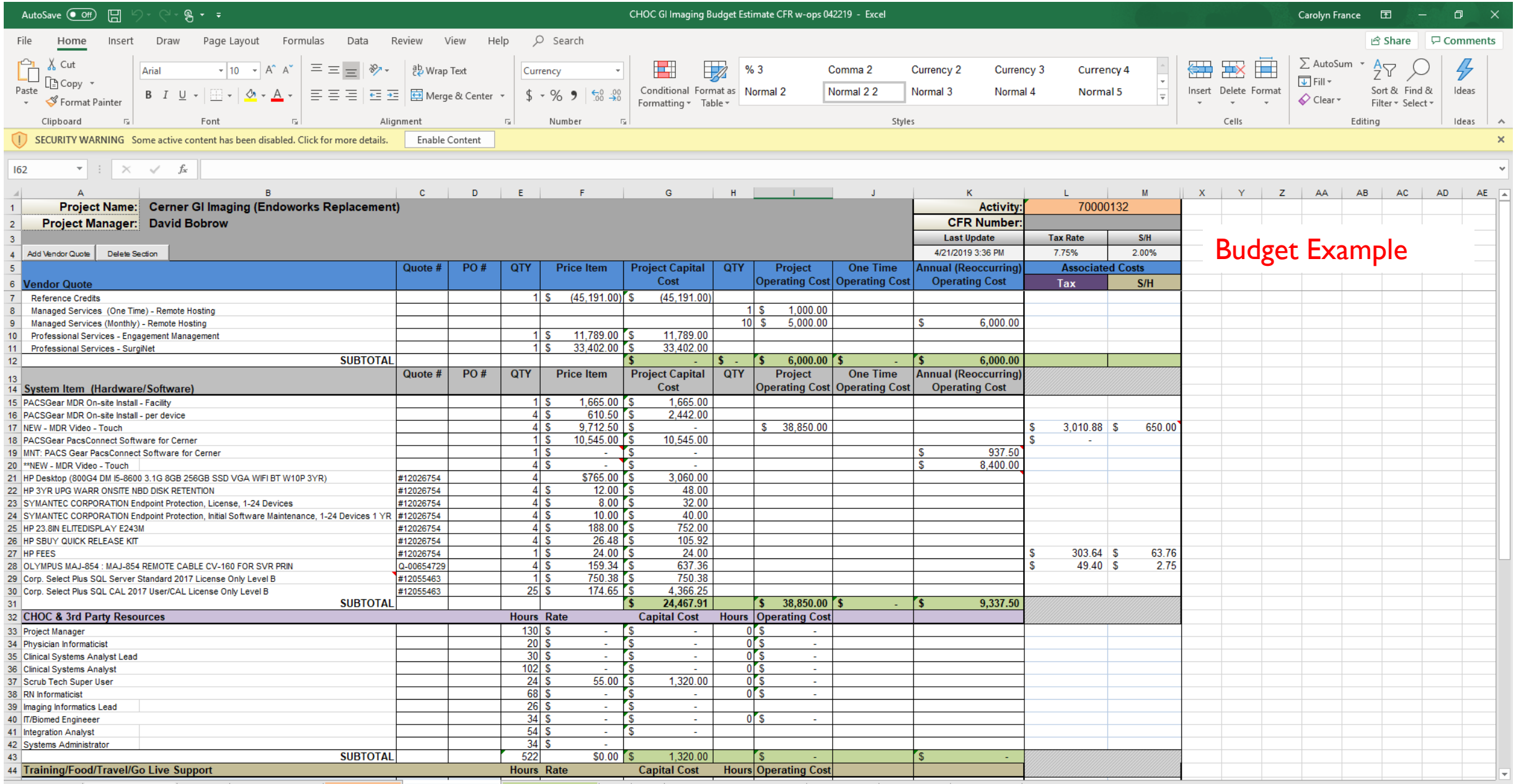
Phase 11 – Requirements for Design Phase

Control Activity	Control Description
Project Plan - Baselined	Baselined Project Plan
Detailed Budget	Budget Estimate and Resource Worksheet
RACI Chart	Responsible, Accountable, Consulted, Informed
Develop Testing Strategy	Testing strategy developed by project team
Develop Training Strategy	Training strategy developed by project team
Project Resources Available	☐ Yes ☐ No


Cerner Procedure Imagi
https://app2.clarizen.com/Clarizen/Project/9790319873?orgId=29919361
CHOC Children's
Project Details · Scheduling View
Project Plan in Clarizen
Help
David Bobrow
Cerner Procedure Imaging & Documentation (Endoworks Replacement)
IT PMO
Properties
Mark As
Email
Delete
Team Board
Burndown Chart
Share
Following
Favorite
Actions
Status: On Track
State: Active
Project Phase: Integrated Testing
Project Manager: David Bobrow
IT Accountable Director:
Business Owner:
Portfolio type: IT PMO
Activity Number: 70000132
IT CFR Line Item #: 19-IS-004
% Complete: 88 ?
Due Date: 05/24/19
Go-Live Date: 04/16/19
Budget Status: At Risk
Risks:
ARC Review:
Justification: This is the replacement of the Olympus Endoworks product, which is not longer supported since March 2018.
Description: This is the replacement of the Olympus Endoworks product, which is not longer supported since March 2018.
Overview: This is the replacement of the Olympus Endoworks product, which is not longer supported since March 2018
More info
5 Followers
1 Managers
3 Reviewers
Roadmap
Add Milestone
Show All
Print
Zoom
Fit
Projects
Q4 2018
Q1 2019
Q2 2019
November
December
January
February
March
April
May
Today
Cerner Procedure Imaging & Documentation (E...
Design
Initiation
Build/Testing
Planning
Deployment/Go Live
Project Close and Control
Work Plan
Filters
Search
Common
Resourcing
Add Related
Actions
Utilities
Add
Insert
Mark As
Email
Report Time
Delete
Link
Unlink
Cut
Copy
Paste
Indent
Outdent
Expand
Collapse
Following
Favorite

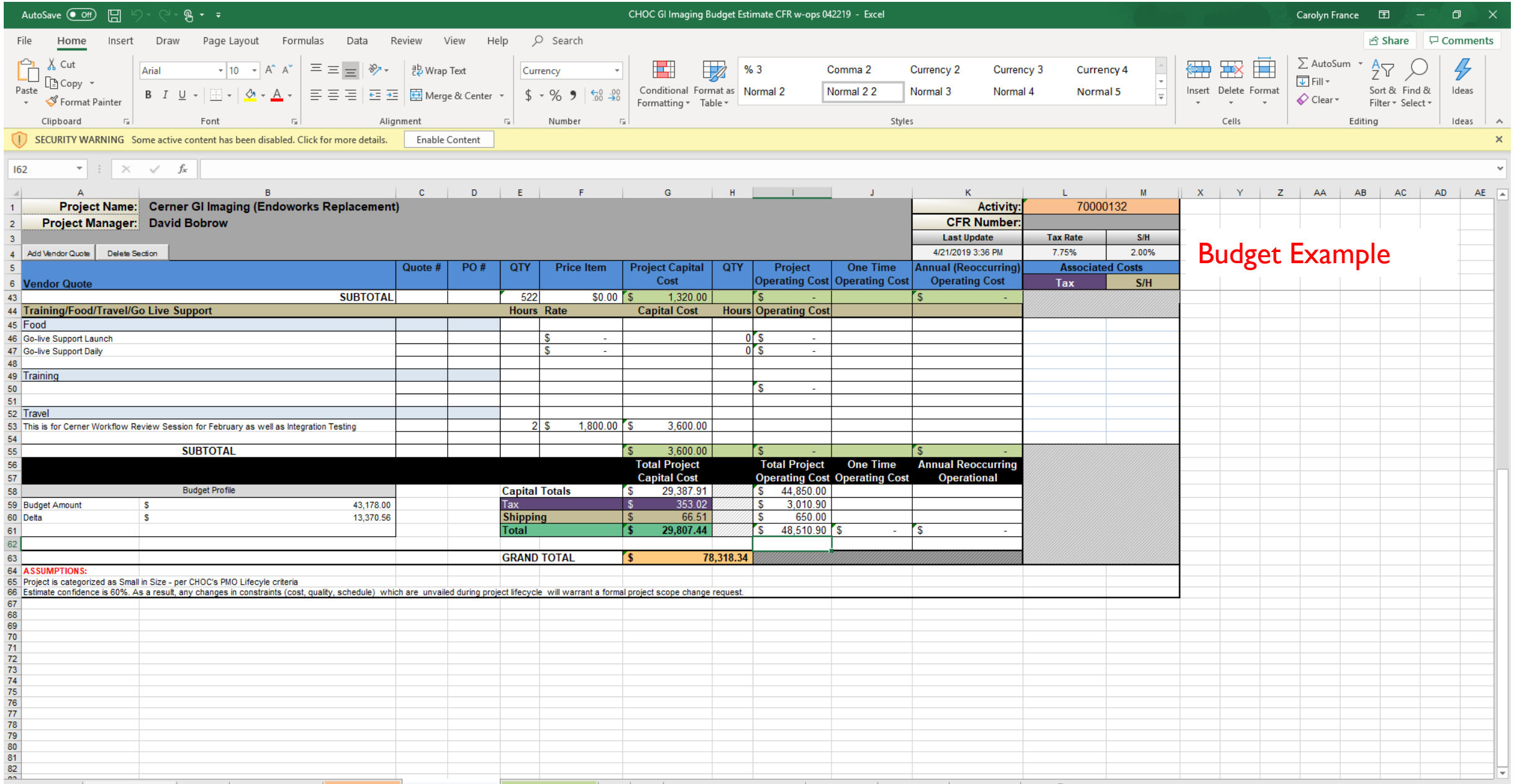
Project Plan in Clarizen





	Project Name:	**Cerner GI Imaging (Endoworks Replacement)**								**Activity:**	70000132		
	Project Manager:	**David Bobrow**								**CFR Number:**			
										Last Update	**Tax Rate**	**S/H**	
	Add Vendor Quote / Delete Section									4/21/2019 3:36 PM	7.75%	2.00%	
	Vendor Quote	**Quote #**	**PO #**	**QTY**	**Price Item**	**Project Capital Cost**	**QTY**	**Project Operating Cost**	**One Time Operating Cost**	**Annual (Reoccurring) Operating Cost**	**Associated Costs**		
											Tax	**S/H**	
	Reference Credits			1	$ (45,191.00)	$ (45,191.00)							
	Managed Services (One Time) - Remote Hosting						1	$ 1,000.00					
	Managed Services (Monthly) - Remote Hosting						10	$ 5,000.00		$ 6,000.00			
	Professional Services - Engagement Management			1	$ 11,789.00	$ 11,789.00							
	Professional Services - SurgiNet			1	$ 33,402.00	$ 33,402.00							
	SUBTOTAL					$ -	$ -	$ 6,000.00	$ -	$ 6,000.00			
	System Item (Hardware/Software)	**Quote #**	**PO #**	**QTY**	**Price Item**	**Project Capital Cost**	**QTY**	**Project Operating Cost**	**One Time Operating Cost**	**Annual (Reoccurring) Operating Cost**			
	PACSGear MDR On-site Install - Facility			1	$ 1,665.00	$ 1,665.00							
	PACSGear MDR On-site Install - per device			4	$ 610.50	$ 2,442.00							
	NEW - MDR Video - Touch			4	$ 9,712.50	$ -		$ 38,850.00			$ 3,010.88	$ 650.00	
	PACSGear PacsConnect Software for Cerner			1	$ 10,545.00	$ 10,545.00					$ -		
	MNT: PACS Gear PacsConnect Software for Cerner			1	$ -	$ -				$ 937.50			
	**NEW - MDR Video - Touch			4	$ -	$ -				$ 8,400.00			
	HP Desktop (800G4 DM I5-8600 3.1G 8GB 256GB SSD VGA WIFI BT W10P 3YR)	#12026754		4	$765.00	$ 3,060.00							
	HP 3YR UPG WARR ONSITE NBD DISK RETENTION	#12026754		4	$ 12.00	$ 48.00							
	SYMANTEC CORPORATION Endpoint Protection, License, 1-24 Devices	#12026754		4	$ 8.00	$ 32.00							
	SYMANTEC CORPORATION Endpoint Protection, Initial Software Maintenance, 1-24 Devices 1 YR	#12026754		4	$ 10.00	$ 40.00							
	HP 23.8IN ELITEDISPLAY E243M	#12026754		4	$ 188.00	$ 752.00							
	HP SBUY QUICK RELEASE KIT	#12026754		4	$ 26.48	$ 105.92							
	HP FEES	#12026754		1	$ 24.00	$ 24.00					$ 303.64	$ 63.76	
	OLYMPUS MAJ-854 : MAJ-854 REMOTE CABLE CV-160 FOR SVR PRIN	Q-00654729		4	$ 159.34	$ 637.36					$ 49.40	$ 2.75	
	Corp. Select Plus SQL Server Standard 2017 License Only Level B	#12055463		1	$ 750.38	$ 750.38							
	Corp. Select Plus SQL CAL 2017 User/CAL License Only Level B	#12055463		25	$ 174.65	$ 4,366.25							
	SUBTOTAL					$ 24,467.91		$ 38,850.00	$ -	$ 9,337.50			
	CHOC & 3rd Party Resources			**Hours**	**Rate**	**Capital Cost**	**Hours**	**Operating Cost**					
	Project Manager			130	$ -	$ -	0	$ -					
	Physician Informaticist			20	$ -	$ -	0	$ -					
	Clinical Systems Analyst Lead			30	$ -	$ -	0	$ -					
	Clinical Systems Analyst			102	$ -	$ -	0	$ -					
	Scrub Tech Super User			24	$ 55.00	$ 1,320.00	0	$ -					
	RN Informaticist			68	$ -	$ -	0	$ -					
	Imaging Informatics Lead			26	$ -	$ -							
	IT/Biomed Engineeer			34	$ -	$ -	0	$ -					
	Integration Analyst			54	$ -	$ -							
	Systems Administrator			34	$ -								
	SUBTOTAL			522	$0.00	$ 1,320.00		$ -		$ -			
	Training/Food/Travel/Go Live Support			**Hours**	**Rate**	**Capital Cost**	**Hours**	**Operating Cost**					

Budget Example

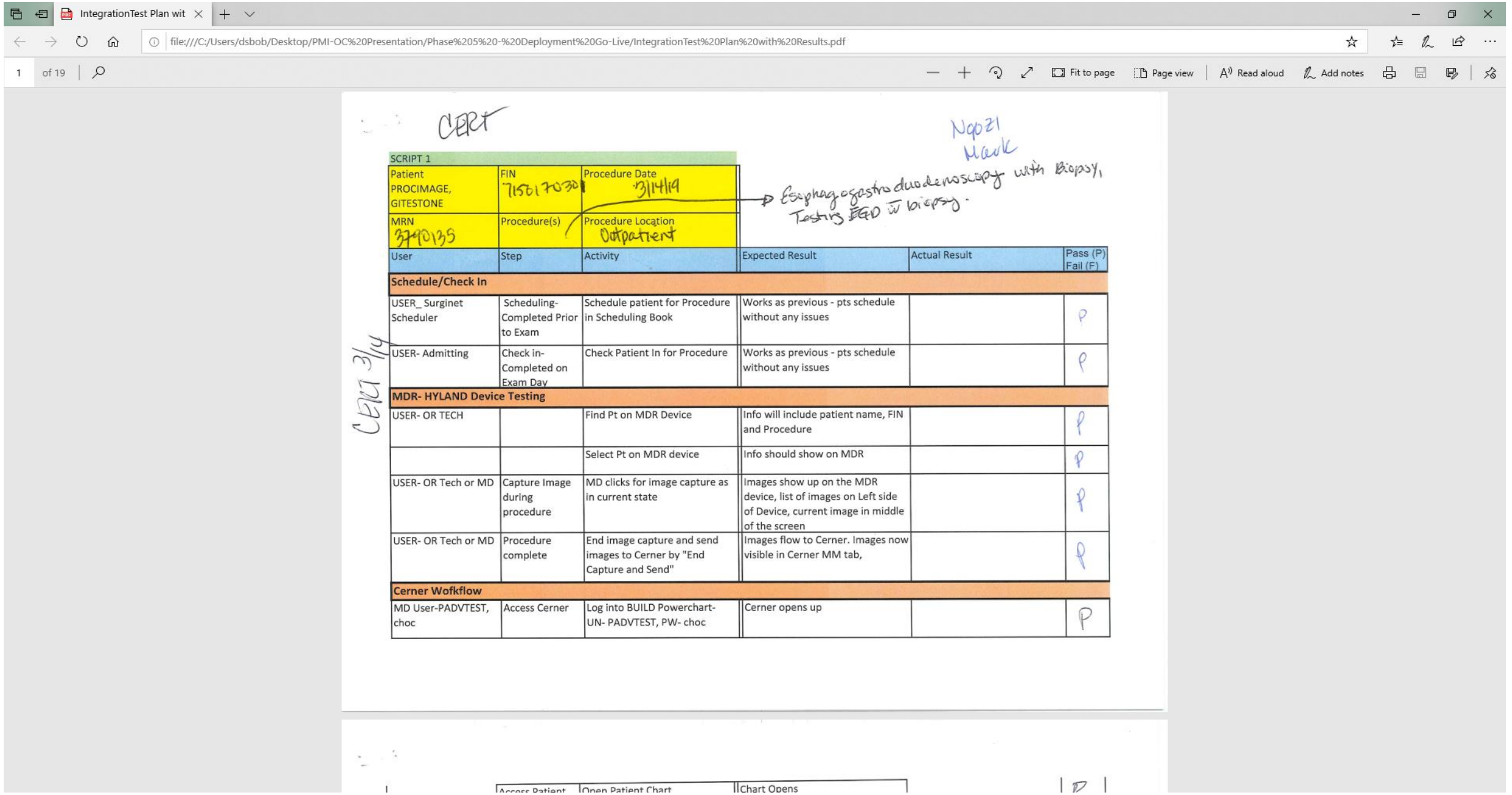

CHOC GI Imaging Budget Estimate CFR w-ops 042219 - Excel
SECURITY WARNING Some active content has been disabled. Click for more details.
Enable Content
Budget Example
Project Name: Cerner GI Imaging (Endoworks Replacement)
Project Manager: David Bobrow
Activity: 70000132
CFR Number:
Last Update 4/21/2019 3:36 PM
Tax Rate 7.75%
S/H 2.00%
Add Vendor Quote
Delete Section
Vendor Quote
Quote #
PO #
QTY
Price Item
Project Capital Cost
QTY
Project Operating Cost
One Time Operating Cost
Annual (Reoccurring) Operating Cost
Associated Costs
Tax
S/H
SUBTOTAL 522 $0.00 $ 1,320.00 $ - $ -
Training/Food/Travel/Go Live Support
Hours
Rate
Capital Cost
Hours
Operating Cost
Food
Go-live Support Launch $ - 0 $ -
Go-live Support Daily $ - 0 $ -
Training
$ -
Travel
This is for Cerner Workflow Review Session for February as well as Integration Testing 2 $ 1,800.00 $ 3,600.00
SUBTOTAL $ 3,600.00 $ - $ -
Total Project Capital Cost
Total Project Operating Cost
One Time Operating Cost
Annual Reoccurring Operational
Budget Profile
Budget Amount $ 43,178.00
Delta $ 13,370.56
Capital Totals $ 29,387.91 $ 44,850.00
Tax $ 353.02 $ 3,010.90
Shipping $ 66.51 $ 650.00
Total $ 29,807.44 $ 48,510.90 $ - $ -
GRAND TOTAL $ 78,318.34
ASSUMPTIONS:
Project is categorized as Small in Size - per CHOC's PMO Lifecyle criteria
Estimate confidence is 60%. As a result, any changes in constraints (cost, quality, schedule) which are unvailed during project lifecycle will warrant a formal project scope change request.
Documentation
Capital
Acct Categories
Capital_Prog
Budget Estimate
Budget Tracking
FN
PO
Reconciliation Remainder
8480 Errors
8482 Labor
7777 Labor

Phase III – Requirements for Build/Unit Testing

Control Activity	Control Description
Detailed Technical Design Sign Off	Approved by Leadership
Application Design Sign Off	Approved by Leadership
Project Resources Available	☐ Yes ☐ No

Phase IV – Requirements for Integrated Testing

Control Activity	Control Description
Execute Detailed Technical Design	Approved by Leadership
Execute Application Design - Includes workflow testing	Approved by Leadership
Project Resources Available	☐ Yes ☐ No



CERT

Napzi
Mark

SCRIPT 1

Patient	FIN	Procedure Date
PROCIMAGE, GITESTONE	71501703O	3/14/19
MRN	Procedure(s)	Procedure Location
3790135		Outpatient

→ Esophagogastroduodenoscopy with Biopsy, Testing EGD w biopsy.

User	Step	Activity	Expected Result	Actual Result	Pass (P) Fail (F)
Schedule/Check In					
USER_ Surginet Scheduler	Scheduling- Completed Prior to Exam	Schedule patient for Procedure in Scheduling Book	Works as previous - pts schedule without any issues		P
USER- Admitting	Check in- Completed on Exam Day	Check Patient In for Procedure	Works as previous - pts schedule without any issues		P
MDR- HYLAND Device Testing					
USER- OR TECH		Find Pt on MDR Device	Info will include patient name, FIN and Procedure		P
		Select Pt on MDR device	Info should show on MDR		P
USER- OR Tech or MD	Capture Image during procedure	MD clicks for image capture as in current state	Images show up on the MDR device, list of images on Left side of Device, current image in middle of the screen		P
USER- OR Tech or MD	Procedure complete	End image capture and send images to Cerner by "End Capture and Send"	Images flow to Cerner. Images now visible in Cerner MM tab,		P
Cerner Wofkflow					
MD User-PADVTEST, choc	Access Cerner	Log into BUILD Powerchart- UN- PADVTEST, PW- choc	Cerner opens up		P

CERT 3/14

Access Patient	Open Patient Chart	Chart Opens

Phase V – Requirements for Deployment/Go-Live

Control Activity	Control Description
Execute Test Plan	Test plan/script for application or system - Testing completion Approved
Issue Tracking Log	Document and resolve issues in the Issue Log
Execute Training Strategy	Training completed
Go-Live Planning	Describe Steps pertaining to Go-Live – Cutover plan, Go-No Go
Operational Support Plan	Dept Support/ISD Turnover Document Sign Off
Submit Change Control	Submit Change Control in Service Now
Project Resources Available for Go Live	☐ Yes ☐ No

CHOC Children's

Procedure Imaging and Documentation
Go/ No-Go Checkpoint
Criteria and Guidelines
04/03/2019

The following list contains the criteria that should be used to evaluate the preparedness for implementation into the Live environment, and to complete the Go/ No Go Checkpoint. By design, this checkpoint occurs at the conclusion of Live Planning, but before all activities required for Live are complete. Therefore, this checkpoint is not a substitute for user acceptance or overall preparedness for Live. Inability to satisfy one criteria or guideline is not meant to stop the project, nor does meeting all criteria and guidelines assure success.

These guidelines are established to:

- Help the Project Team (consisting of IS and Surgery) make an informed judgment about whether or not to move forward with activation processes (including Live Plan communication)
- Review status of major tasks remaining before Live
- Understand and put into perspective key risk factors on the project
- Provide ample information to guide the steering committee to an educated decision

Area	Criteria	Documentation	Guidelines	Recommendation

Testing Events/ Data Validation	Data has been validated and passes all testing.	• Functional Evaluation – fully validated & signed off based on the Patient Testing Script.
		• In the test plan, 4 patients were tested involving various procedures based on the following process:
		  • Schedule/Check In
		  • MDR – Hyland Device Testing
		  • Cerner Workflow
		  • Image Management
		  • Cerner Note Creation
			• Testing events have been executed.
			• Physician review has been completed.
			• SMEs review has been completed.
				• Go, providing the following gets is done by Go-Live:
				  • Validation that all procedure descriptions get tested via the Cerner-Hyland MDR scheduling interface.
				  • A diagram of the GI tract needs to be in place for GI.
				  • Add GI Quick Orders
				  • Add Procedure Date for Printed Images
				  • Validation of all 4 MDR devices
				  • Validate that each room that the cart is used at has a network jack.

IntegrationTest Plan with Re | Signed Procedure Imag
file:///C:/Users/dsbob/Desktop/PMI-OC%20Presentation/Phase%205%20-%20Deployment%20Go-Live/Signed%20Procedure%20Imaging%20Go-NoGo%20Document.pdf
2 of 3
Fit to page | Page view | Read aloud | Add notes

CHOC Children's

Procedure Imaging and Documentation
Go/ No-Go Checkpoint
Criteria and Guidelines
04/03/2019

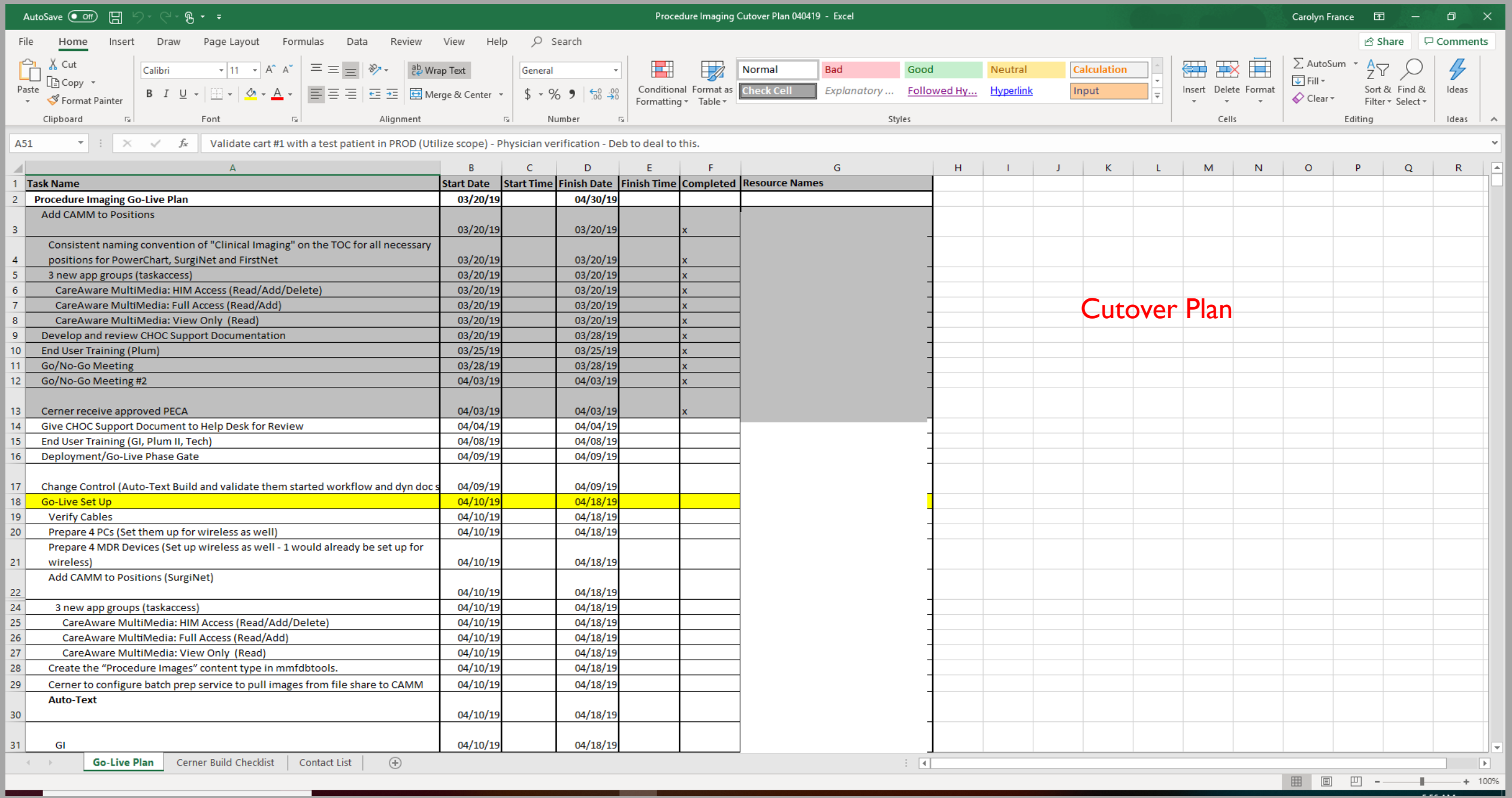
System Performance	Database, Network, Citrix and application servers are fully functional.	• During testing no performance related issues have been identified	• Data processing or screen movement has no degradation.	• Go
Training/ Processes	Materials	• User documentation will be provided.	• Personalized training to the Pulmonary and GI physicians as well as the techs involving training documentation will be provided	• Go
Signoff	Required signoffs complete	• Data Validation	• Signoff	Required signoffs complete
Post-Live Support	Resources have been identified and secured	• Resources have been identified and secured for post go-live support. • Help Desk Support Document has been created	* Required resources have been identified.	• Go
	Transition to Operations	• Transition will occur 2 weeks after go live of Phase II (to the rest of the enterprise).	* Plans are in place to transition Project support to CUBS support	• Go

CHOC Children's

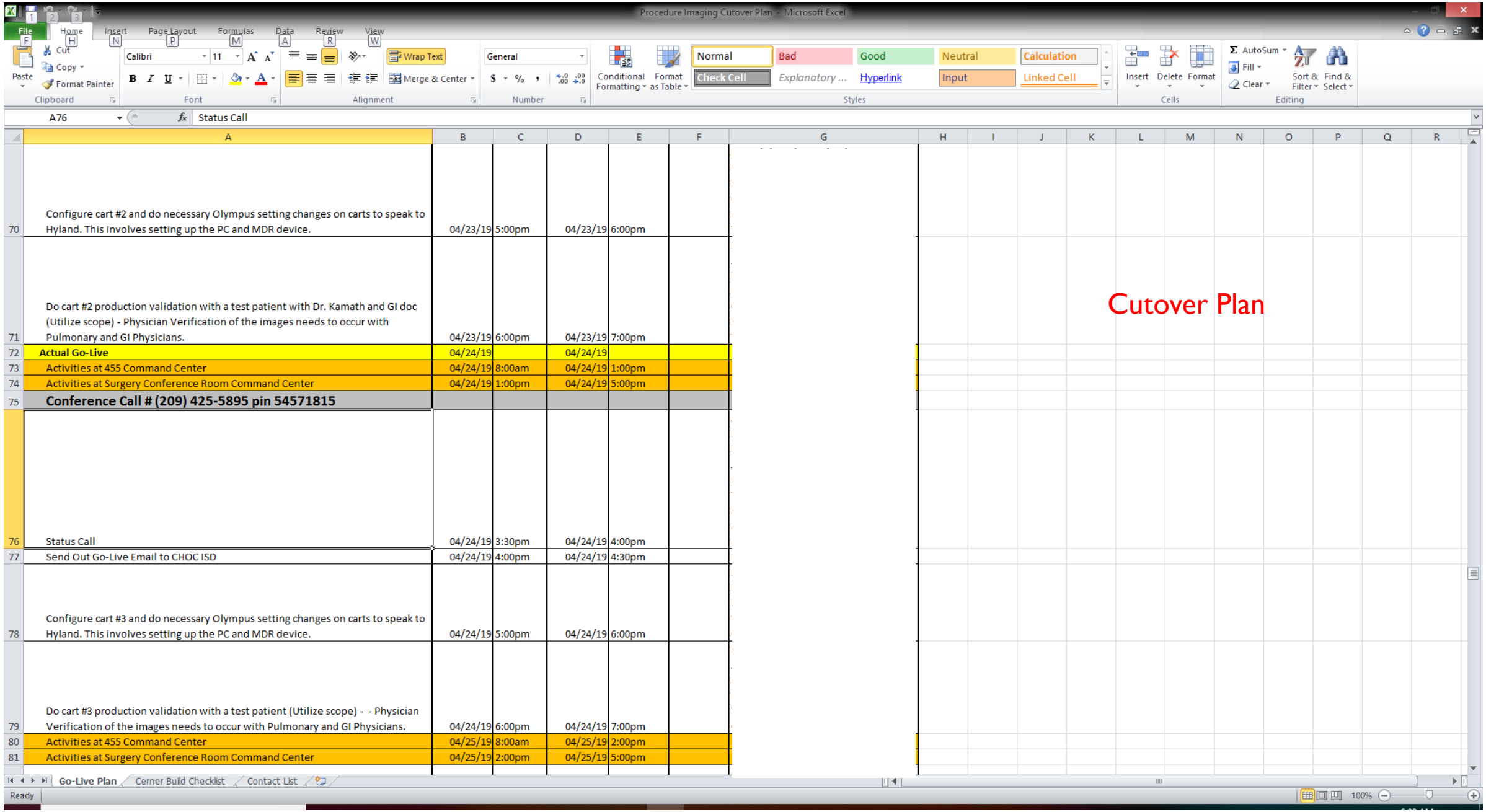
Procedure Imaging and Documentation
Go/ No-Go Checkpoint
Criteria and Guidelines
03/28/2019

Approvals:

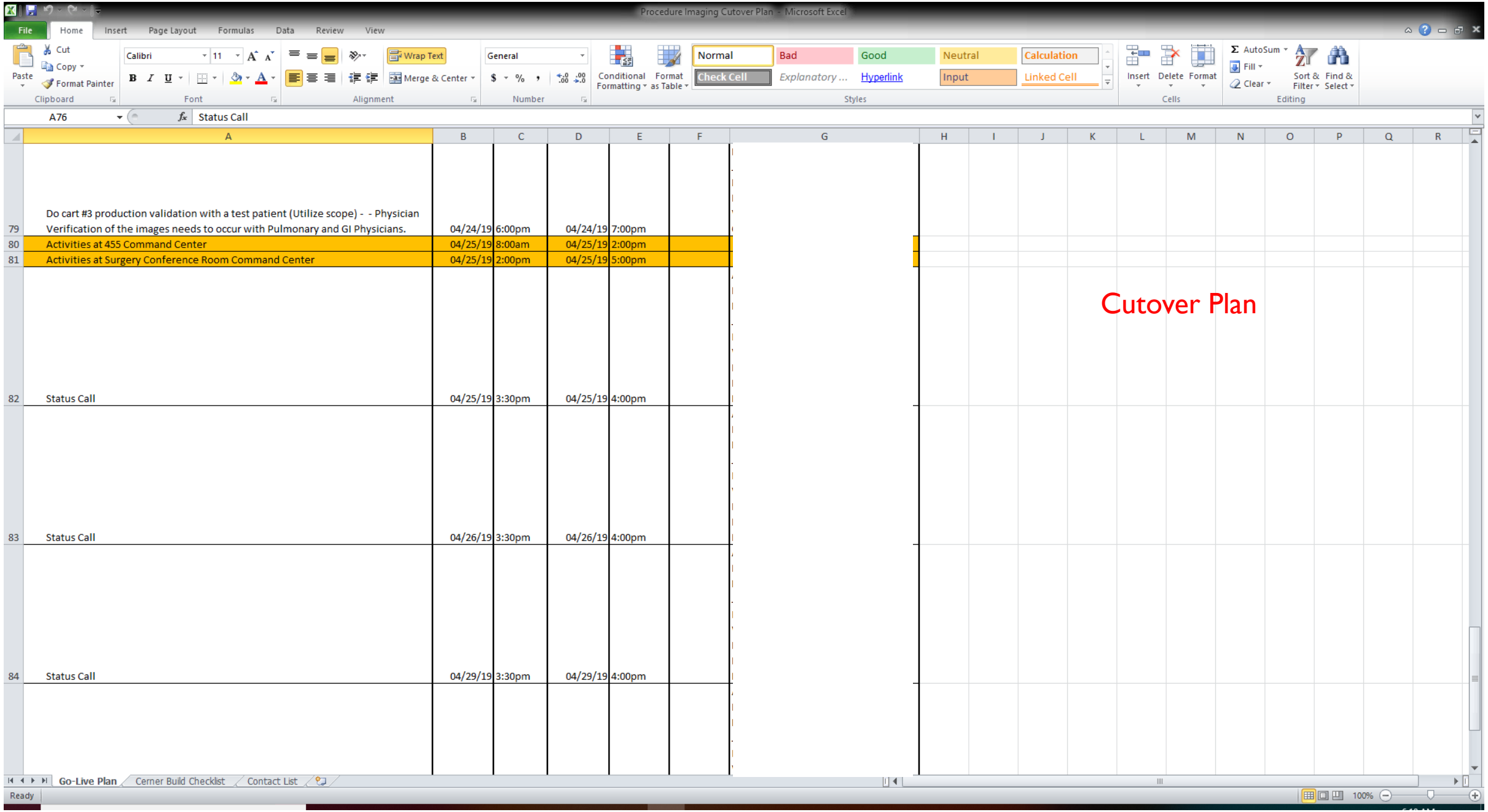
Project Owner –	Date 4/8/19
Physician Champion –	Date 4/3/19
Clinical Informatics Supervisor –	Date 4/3/19
Nursing Informaticist –	Date 4/4/19
System Analyst –	Date 4/4/19
Integration Analyst –	Date 4/4/19
System Analyst Lead –	Date 4/4/19
Nurse Manager –	Date 4/4/19
Project Manager – David Bobrow	Date 4/4/19



Task Name	Start Date	Start Time	Finish Date	Finish Time	Completed	Resource Names
Procedure Imaging Go-Live Plan	**03/20/19**		**04/30/19**			
Add CAMM to Positions	03/20/19		03/20/19		x	
Consistent naming convention of "Clinical Imaging" on the TOC for all necessary positions for PowerChart, SurgiNet and FirstNet	03/20/19		03/20/19		x	
3 new app groups (taskaccess)	03/20/19		03/20/19		x	
CareAware MultiMedia: HIM Access (Read/Add/Delete)	03/20/19		03/20/19		x	
CareAware MultiMedia: Full Access (Read/Add)	03/20/19		03/20/19		x	
CareAware MultiMedia: View Only (Read)	03/20/19		03/20/19		x	
Develop and review CHOC Support Documentation	03/20/19		03/28/19		x	
End User Training (Plum)	03/25/19		03/25/19		x	
Go/No-Go Meeting	03/28/19		03/28/19		x	
Go/No-Go Meeting #2	04/03/19		04/03/19		x	
Cerner receive approved PECA	04/03/19		04/03/19		x	
Give CHOC Support Document to Help Desk for Review	04/04/19		04/04/19			
End User Training (GI, Plum II, Tech)	04/08/19		04/08/19			
Deployment/Go-Live Phase Gate	04/09/19		04/09/19			
Change Control (Auto-Text Build and validate them started workflow and dyn doc s	04/09/19		04/09/19			
Go-Live Set Up	04/10/19		04/18/19			
Verify Cables	04/10/19		04/18/19			
Prepare 4 PCs (Set them up for wireless as well)	04/10/19		04/18/19			
Prepare 4 MDR Devices (Set up wireless as well - 1 would already be set up for wireless)	04/10/19		04/18/19			
Add CAMM to Positions (SurgiNet)	04/10/19		04/18/19			
3 new app groups (taskaccess)	04/10/19		04/18/19			
CareAware MultiMedia: HIM Access (Read/Add/Delete)	04/10/19		04/18/19			
CareAware MultiMedia: Full Access (Read/Add)	04/10/19		04/18/19			
CareAware MultiMedia: View Only (Read)	04/10/19		04/18/19			
Create the “Procedure Images” content type in mmfdbtools.	04/10/19		04/18/19			
Cerner to configure batch prep service to pull images from file share to CAMM	04/10/19		04/18/19			
Auto-Text	04/10/19		04/18/19			
GI	04/10/19		04/18/19			



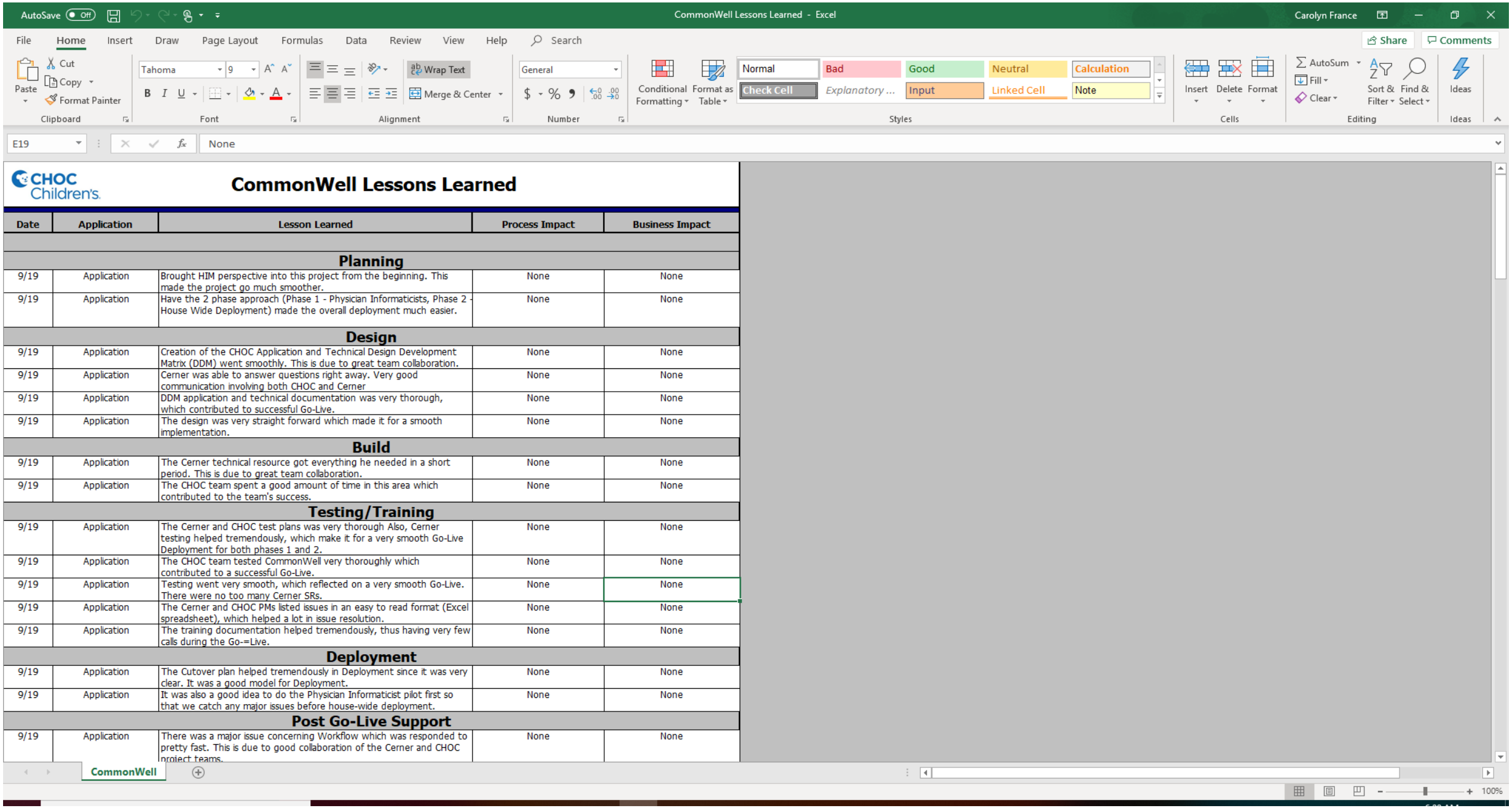
	A	B	C	D	E
70	Configure cart #2 and do necessary Olympus setting changes on carts to speak to Hyland. This involves setting up the PC and MDR device.	04/23/19	5:00pm	04/23/19	6:00pm
71	Do cart #2 production validation with a test patient with Dr. Kamath and GI doc (Utilize scope) - Physician Verification of the images needs to occur with Pulmonary and GI Physicians.	04/23/19	6:00pm	04/23/19	7:00pm
72	**Actual Go-Live**	04/24/19		04/24/19	
73	Activities at 455 Command Center	04/24/19	8:00am	04/24/19	1:00pm
74	Activities at Surgery Conference Room Command Center	04/24/19	1:00pm	04/24/19	5:00pm
75	**Conference Call # (209) 425-5895 pin 54571815**				
76	Status Call	04/24/19	3:30pm	04/24/19	4:00pm
77	Send Out Go-Live Email to CHOC ISD	04/24/19	4:00pm	04/24/19	4:30pm
78	Configure cart #3 and do necessary Olympus setting changes on carts to speak to Hyland. This involves setting up the PC and MDR device.	04/24/19	5:00pm	04/24/19	6:00pm
79	Do cart #3 production validation with a test patient (Utilize scope) - - Physician Verification of the images needs to occur with Pulmonary and GI Physicians.	04/24/19	6:00pm	04/24/19	7:00pm
80	Activities at 455 Command Center	04/25/19	8:00am	04/25/19	2:00pm
81	Activities at Surgery Conference Room Command Center	04/25/19	2:00pm	04/25/19	5:00pm

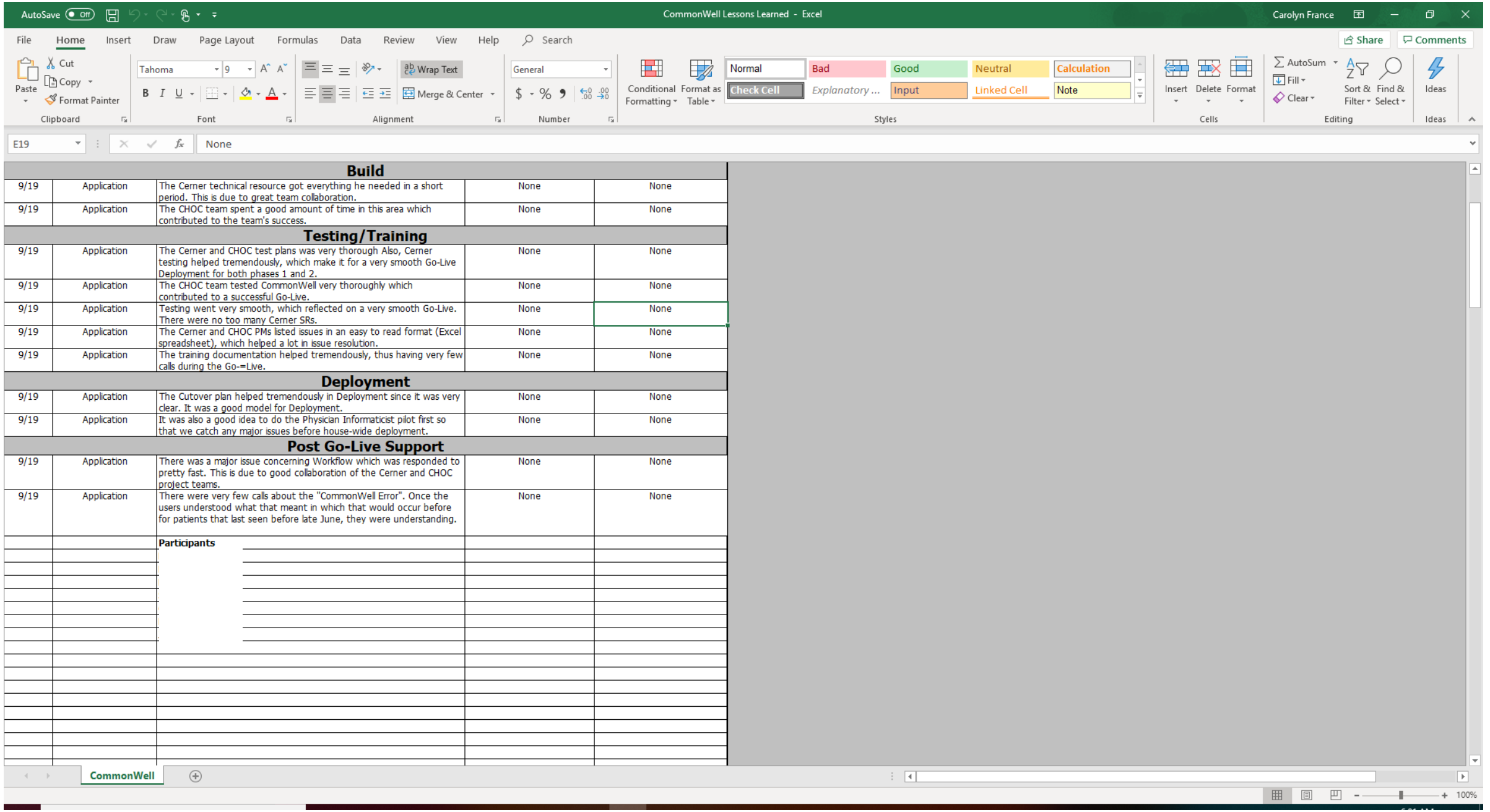


	A	B	C	D	E	F
79	Do cart #3 production validation with a test patient (Utilize scope) - - Physician Verification of the images needs to occur with Pulmonary and GI Physicians.	04/24/19	6:00pm	04/24/19	7:00pm	
80	Activities at 455 Command Center	04/25/19	8:00am	04/25/19	2:00pm	
81	Activities at Surgery Conference Room Command Center	04/25/19	2:00pm	04/25/19	5:00pm	
82	Status Call	04/25/19	3:30pm	04/25/19	4:00pm	
83	Status Call	04/26/19	3:30pm	04/26/19	4:00pm	
84	Status Call	04/29/19	3:30pm	04/29/19	4:00pm	

Phase VI – Requirements for Project Closure

Control Activity	Control Description
Go-Live Announcement	Go-Live email
Execute Go Live Plan	Go-Live email
Lessons Learned	Positive feedback and Learning opportunities that occurred during the project
Final Closed Budget	Project budget actuals - Notification to Finance
Transition to support	Release of project resources


AutoSave
CommonWell Lessons Learned - Excel
Carolyn France
File Home Insert Draw Page Layout Formulas Data Review View Help Search
Share Comments
Cut Copy Format Painter Paste
Tahoma 9
Wrap Text
Merge & Center
General
Conditional Formatting
Format as Table
Normal Bad Good Neutral Calculation
Check Cell Explanatory ... Input Linked Cell Note
Insert Delete Format
AutoSum Fill Clear
Sort & Filter Find & Select
Ideas
Clipboard Font Alignment Number Styles Cells Editing Ideas
E19
None
CHOC Children's
CommonWell Lessons Learned
Date | Application | Lesson Learned | Process Impact | Business Impact
Planning
9/19 | Application | Brought HIM perspective into this project from the beginning. This made the project go much smoother. | None | None
9/19 | Application | Have the 2 phase approach (Phase 1 - Physician Informaticists, Phase 2 - House Wide Deployment) made the overall deployment much easier. | None | None
Design
9/19 | Application | Creation of the CHOC Application and Technical Design Development Matrix (DDM) went smoothly. This is due to great team collaboration. | None | None
9/19 | Application | Cerner was able to answer questions right away. Very good communication involving both CHOC and Cerner | None | None
9/19 | Application | DDM application and technical documentation was very thorough, which contributed to successful Go-Live. | None | None
9/19 | Application | The design was very straight forward which made it for a smooth implementation. | None | None
Build
9/19 | Application | The Cerner technical resource got everything he needed in a short period. This is due to great team collaboration. | None | None
9/19 | Application | The CHOC team spent a good amount of time in this area which contributed to the team's success. | None | None
Testing/Training
9/19 | Application | The Cerner and CHOC test plans was very thorough Also, Cerner testing helped tremendously, which make it for a very smooth Go-Live Deployment for both phases 1 and 2. | None | None
9/19 | Application | The CHOC team tested CommonWell very thoroughly which contributed to a successful Go-Live. | None | None
9/19 | Application | Testing went very smooth, which reflected on a very smooth Go-Live. There were no too many Cerner SRs. | None | None
9/19 | Application | The Cerner and CHOC PMs listed issues in an easy to read format (Excel spreadsheet), which helped a lot in issue resolution. | None | None
9/19 | Application | The training documentation helped tremendously, thus having very few calls during the Go-=Live. | None | None
Deployment
9/19 | Application | The Cutover plan helped tremendously in Deployment since it was very clear. It was a good model for Deployment. | None | None
9/19 | Application | It was also a good idea to do the Physician Informaticist pilot first so that we catch any major issues before house-wide deployment. | None | None
Post Go-Live Support
9/19 | Application | There was a major issue concerning Workflow which was responded to pretty fast. This is due to good collaboration of the Cerner and CHOC project teams. | None | None
CommonWell
100%



		Build		
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9/19	Application	The CHOC team spent a good amount of time in this area which contributed to the team's success.	None	None
		Testing/Training		
9/19	Application	The Cerner and CHOC test plans was very thorough Also, Cerner testing helped tremendously, which make it for a very smooth Go-Live Deployment for both phases 1 and 2.	None	None
9/19	Application	The CHOC team tested CommonWell very thoroughly which contributed to a successful Go-Live.	None	None
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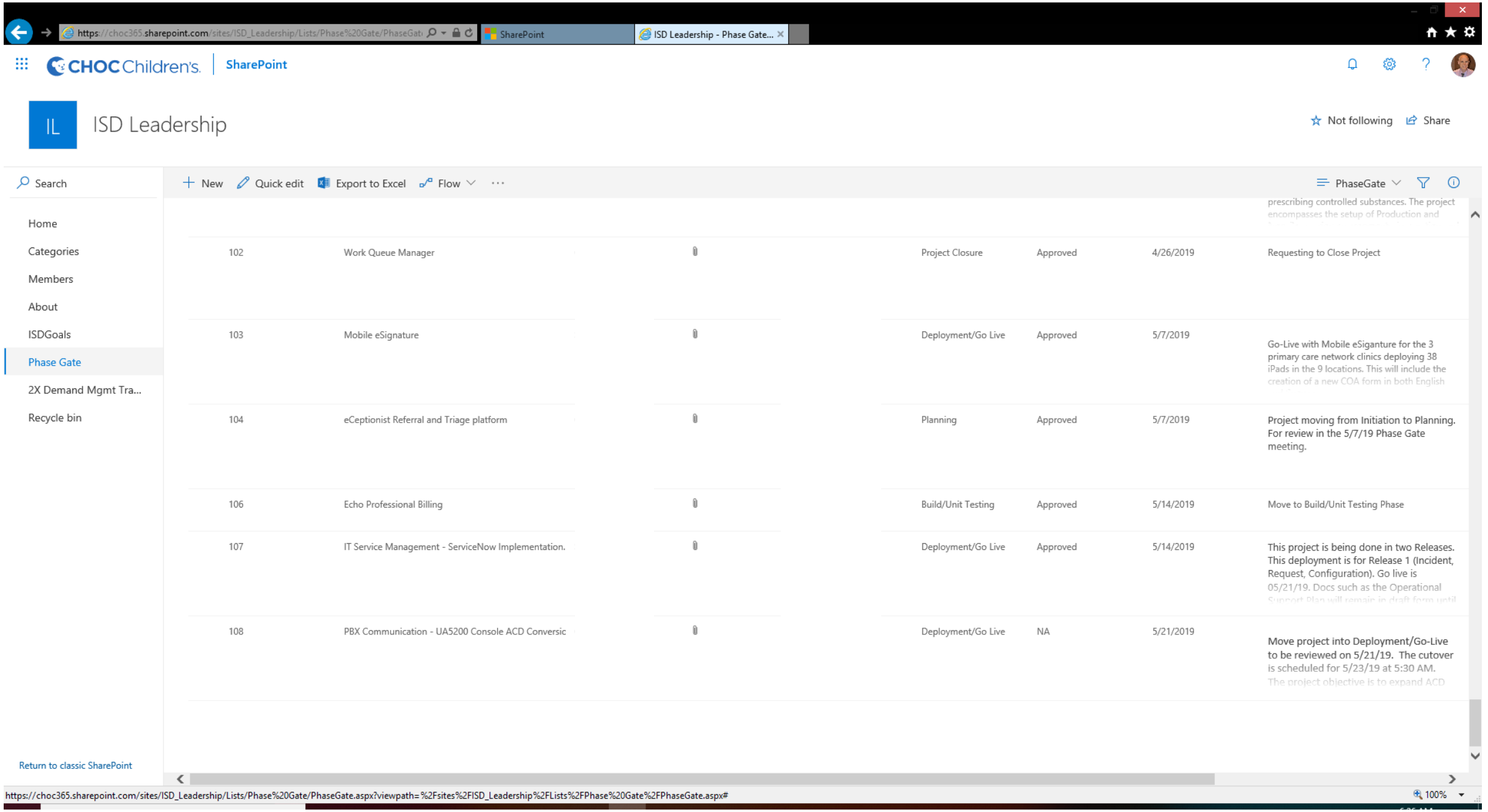
9/19	Application	It was also a good idea to do the Physician Informaticist pilot first so that we catch any major issues before house-wide deployment.	None	None
		Post Go-Live Support		
9/19	Application	There was a major issue concerning Workflow which was responded to pretty fast. This is due to good collaboration of the Cerner and CHOC project teams.	None	None
9/19	Application	There were very few calls about the "CommonWell Error". Once the users understood what that meant in which that would occur before for patients that last seen before late June, they were understanding.	None	None
		Participants		

Phase Gate Process Demo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Recycle bin
prescribing controlled substances. The project encompasses the setup of Production and
102 Work Queue Manager Project Closure Approved 4/26/2019 Requesting to Close Project
103 Mobile eSignature Deployment/Go Live Approved 5/7/2019 Go-Live with Mobile eSiganture for the 3 primary care network clinics deploying 38 iPads in the 9 locations. This will include the creation of a new COA form in both English
104 eCeptionist Referral and Triage platform Planning Approved 5/7/2019 Project moving from Initiation to Planning. For review in the 5/7/19 Phase Gate meeting.
106 Echo Professional Billing Build/Unit Testing Approved 5/14/2019 Move to Build/Unit Testing Phase
107 IT Service Management - ServiceNow Implementation. Deployment/Go Live Approved 5/14/2019 This project is being done in two Releases. This deployment is for Release 1 (Incident, Request, Configuration). Go live is 05/21/19. Docs such as the Operational
108 PBX Communication - UA5200 Console ACD Conversic Deployment/Go Live NA 5/21/2019 Move project into Deployment/Go-Live to be reviewed on 5/21/19. The cutover is scheduled for 5/23/19 at 5:30 AM. The project objective is to expand ACD
Return to classic SharePoint
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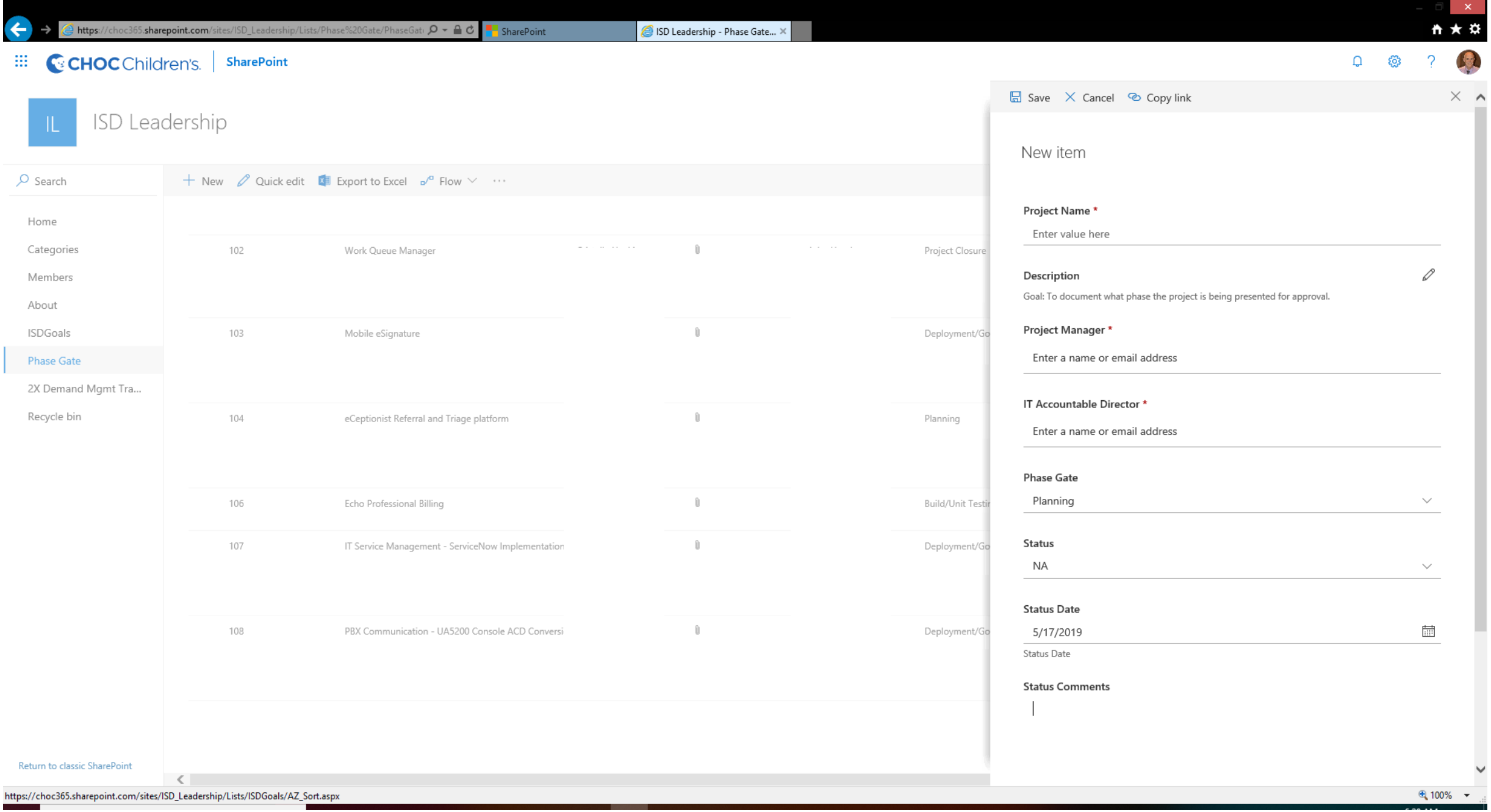
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102 Work Queue Manager Project Closure
103 Mobile eSignature Deployment/Go
104 eCeptionist Referral and Triage platform Planning
106 Echo Professional Billing Build/Unit Testi
107 IT Service Management - ServiceNow Implementation Deployment/Go
108 PBX Communication - UA5200 Console ACD Conversi Deployment/Go
Save
Cancel
Copy link
New item
Project Name *
Enter value here
Description
Goal: To document what phase the project is being presented for approval.
Project Manager *
Enter a name or email address
IT Accountable Director *
Enter a name or email address
Phase Gate
Planning
Status
NA
Status Date
5/17/2019
Status Date
Status Comments
https://choc365.sharepoint.com/sites/ISD_Leadership/Lists/ISDGoals/AZ_Sort.aspx
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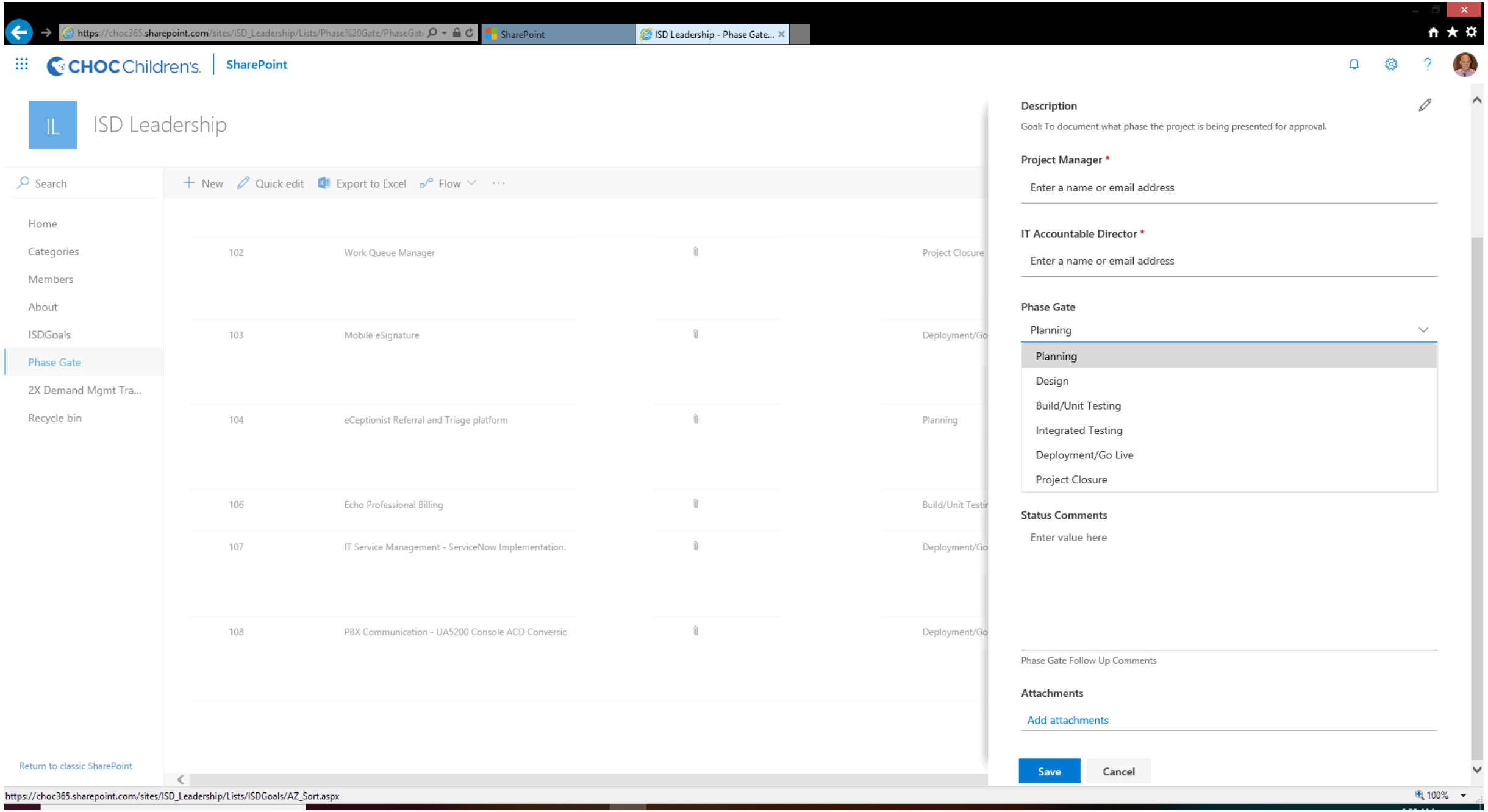
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106 Echo Professional Billing Build/Unit Testi
107 IT Service Management - ServiceNow Implementation. Deployment/Go
108 PBX Communication - UA5200 Console ACD Conversic Deployment/Go
Description
Goal: To document what phase the project is being presented for approval.
Project Manager *
Enter a name or email address
IT Accountable Director *
Enter a name or email address
Phase Gate
Planning
Planning
Design
Build/Unit Testing
Integrated Testing
Deployment/Go Live
Project Closure
Status Comments
Enter value here
Phase Gate Follow Up Comments
Attachments
Add attachments
Save
Cancel
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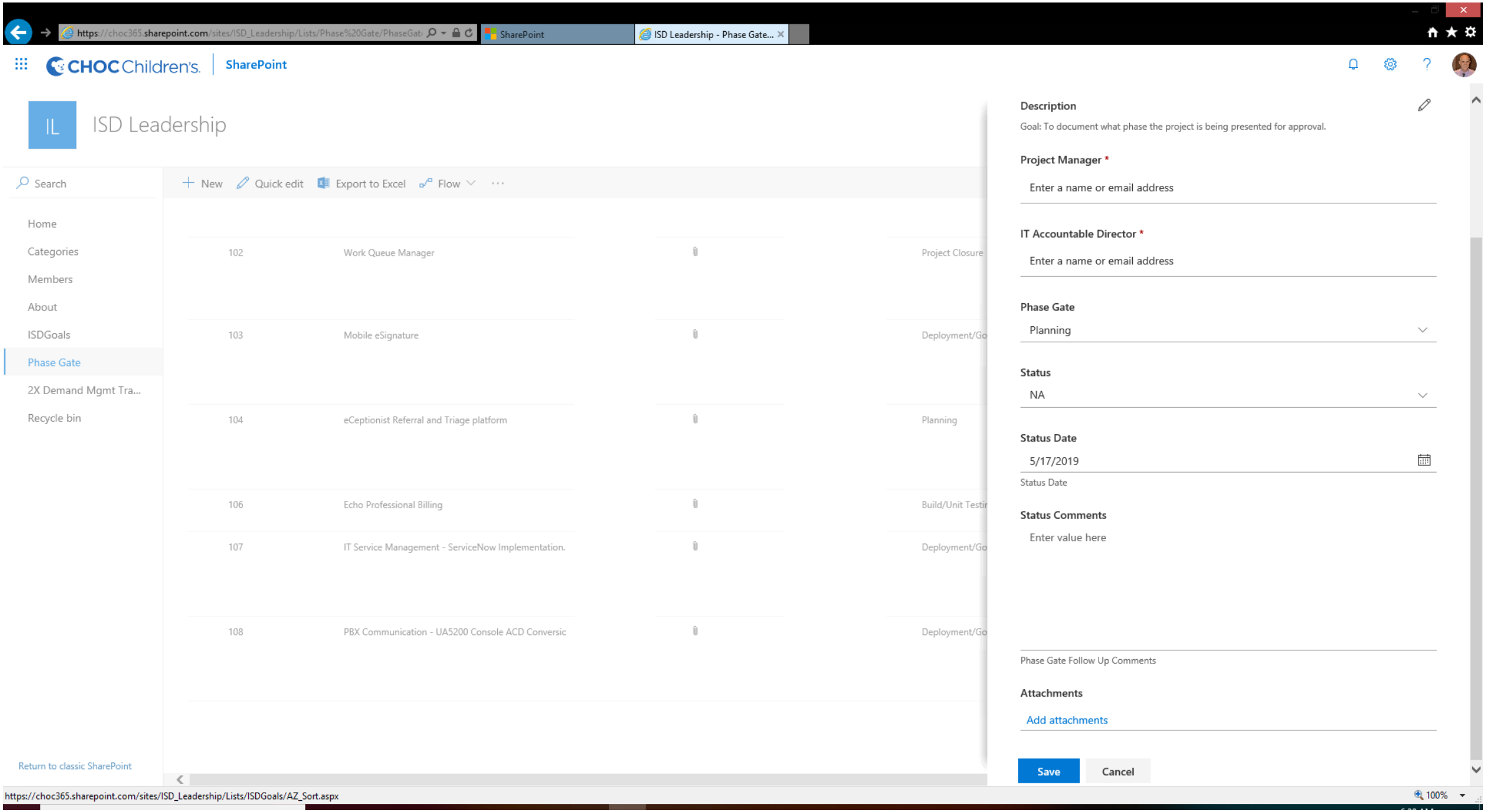
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Goal: To document what phase the project is being presented for approval.
Project Manager *
Enter a name or email address
IT Accountable Director *
Enter a name or email address
Phase Gate
Planning
Status
NA
Status Date
5/17/2019
Status Date
Status Comments
Enter value here
Phase Gate Follow Up Comments
Attachments
Add attachments
Save
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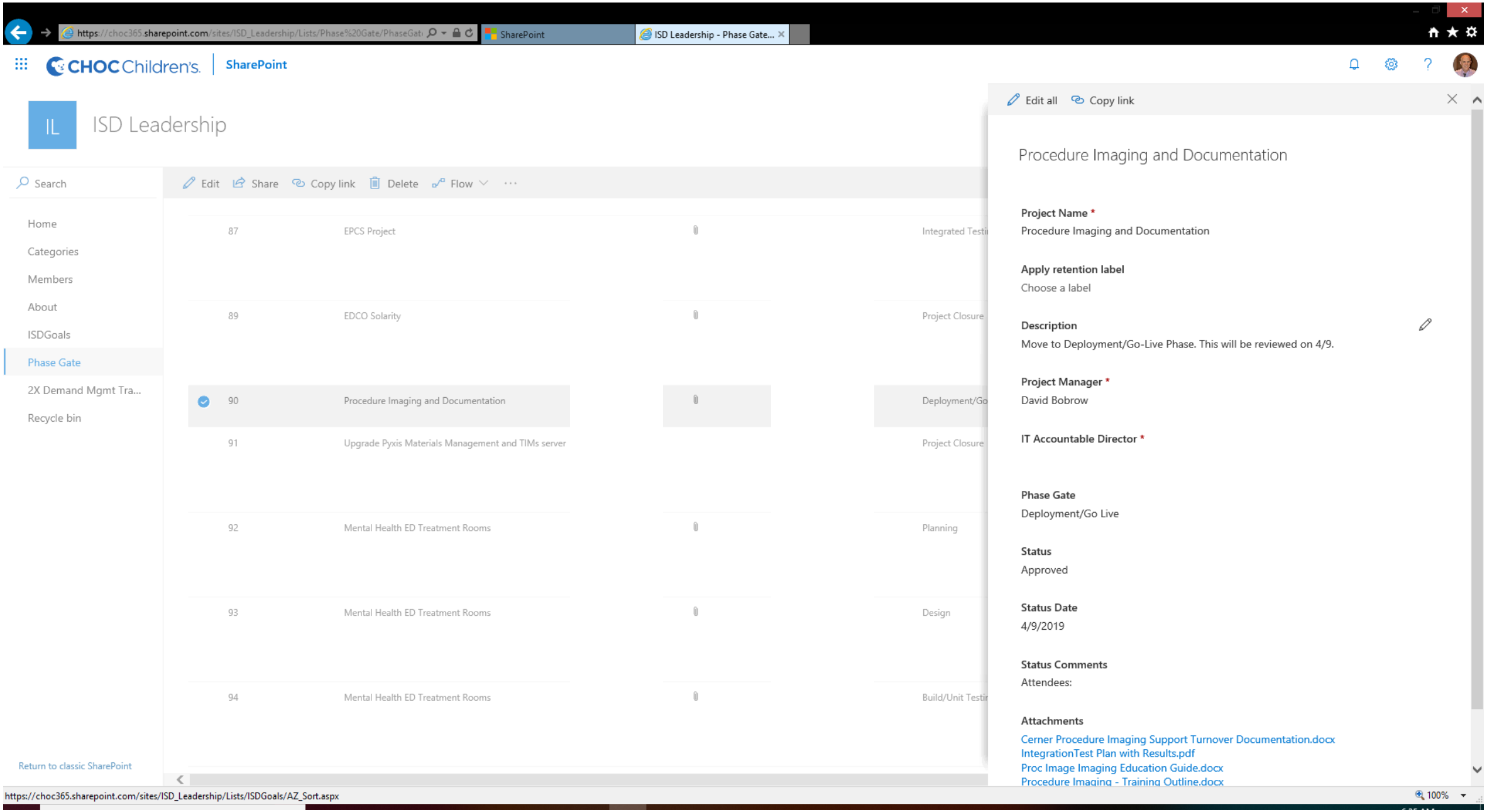
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Recycle bin
Return to classic SharePoint
Edit
Share
Copy link
Delete
Flow
87 EPCS Project
89 EDCO Solarity
90 Procedure Imaging and Documentation
91 Upgrade Pyxis Materials Management and TIMs server
92 Mental Health ED Treatment Rooms
93 Mental Health ED Treatment Rooms
94 Mental Health ED Treatment Rooms
Edit all
Copy link
Procedure Imaging and Documentation
Project Name *
Procedure Imaging and Documentation
Apply retention label
Choose a label
Description
Move to Deployment/Go-Live Phase. This will be reviewed on 4/9.
Project Manager *
David Bobrow
IT Accountable Director *
Phase Gate
Deployment/Go Live
Status
Approved
Status Date
4/9/2019
Status Comments
Attendees:
Attachments
Cerner Procedure Imaging Support Turnover Documentation.docx
IntegrationTest Plan with Results.pdf
Proc Image Imaging Education Guide.docx
Procedure Imaging - Training Outline.docx
https://choc365.sharepoint.com/sites/ISD_Leadership/Lists/ISDGoals/AZ_Sort.aspx
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Why is Phase Gate Successful?

Why is Phase Gate Successful at CHOC?

- ISD Leadership project awareness
- A greater number of projects are done on time
- Project Documentation is done in a more timely manner
- ISD Leadership has knowledge of resources.
- To date 100+ Phase Gates have been done.

Questions

Thank You