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Implementing MSOW: Tips for Success from Lessons Learned

Presented by:

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About Scripps Health

- 3200+ Clinical service practitioners
 - 3000 Active
 - 200 Allied Health
- 5 acute care hospital facilities
- 22 Clinics
- 2 Ambulatory Surgery Centers
- 1 IPA and 1 Health Plan
- 1 Hospice
- 2 Residency/Fellowship programs


Scripps Health

Scripps Health is a nonprofit health care system based in San Diego, California. The system includes four hospitals and 19 outpatient facilities, and treats a half-million patients annually through 2,600 affiliated physicians.

Wikipedia

Founder: [Ellen Browning Scripps](#)

Founded: 1924



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Scripps Health MSOW Teams

Credentialing/Privileging

- One Director
- One Manager
- Six Credentialing Specialists
- One Credentialing Coordinator
- One Credentialing Data Quality Analyst

Internal Health Plan and Enrollment handled by Billing Office

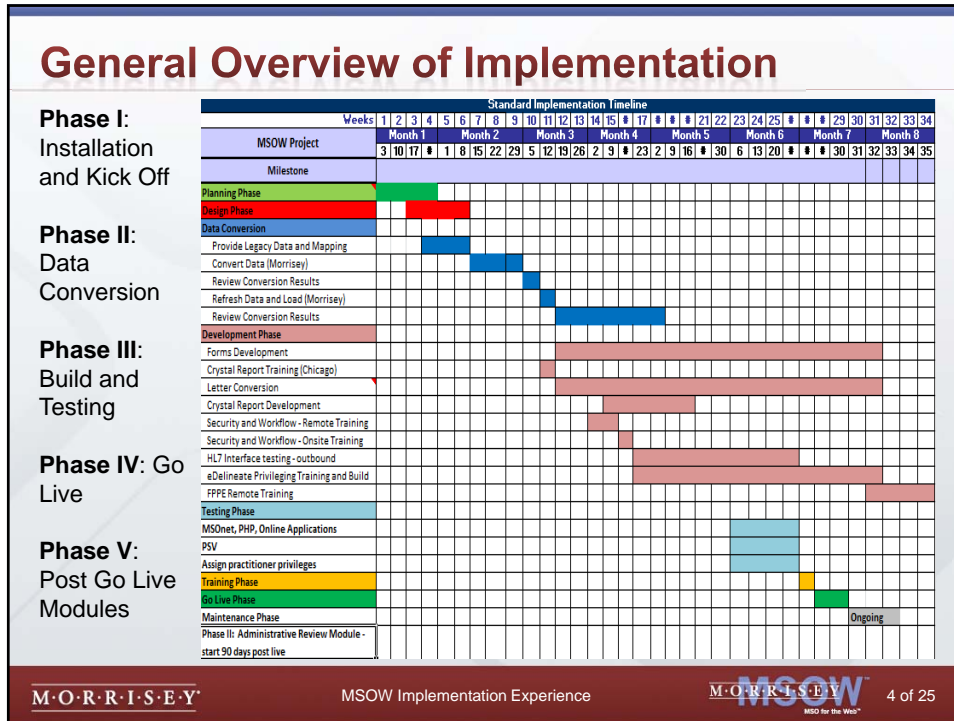
- One manager
- Two Credentialists/Auditor
- Three enrollment coordinators
- One administrative support

All the above teams work concurrently for practitioner on-boarding in an integrated and complex credentialing & billing environment.

Scripps Health Privileging

Privileging is handled by each individual hospital

- **Scripps Green** (560+) – One Manager, one Cred Coordinator
- **Scripps Encinitas** (750+) – One Director, 2 Med Staff Coordinators, 2 Med Staff Specialists
- **Scripps La Jolla** (1100+) – One Director*, 1 Manager, 1 CME/Librarian, 1 GME, 1 Legal Assistant, 2 Med Staff Coordinators, 2 Med Staff Specialists
- **Scripps Mercy Chula Vista** (480+)– 1 Med Staff Coordinator, 1 Med Staff Data Quality Analyst
- **Scripps Mercy San Diego** (1100+) – 2 Med Staff Specialists, 1 Admin Asst, 1 CME, 1 Med Staff Coordinator




Phase I: Technical Set-up

Project Planning

- Requesting VPN Accounts to Your Network (4-6 weeks)
- Hardware Procurement & System Specifications (*lead time)
- Scheduling the installation event (8 hours)
- Workstation Configuration

- Client Hosted MSOW or Morrisey Hosted MSOW
 - MSOW Hosted: Maintenance of technical hardware is performed by Morrisey Infrastructure Team
 - Locally Hosted: Client IT is responsible for server maintenance, system requirements and specifications
- 4 Web Servers
 - MSOW TEST
 - MSOW PROD (load-balanced?)
 - Business Objects Enterprise
 - Server in the DMZ
- Oracle or SQL Database



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MSOW Kick Off Meeting

The **MSOW Kickoff Meeting** formally recognizes the start of the project.

- The Kickoff meeting provides an opportunity to:
 - Introduce Official Sponsor(s)
 - Introduce Key Stakeholders
 - Review Project Scope, Roles & Objectives
 - Review High-level Timeline & Milestones
 - Review Challenges specific to your organization





This meeting allows the Sponsor(s) to relay their commitment to the MSOW implementation outcome, and establishes internal communication and coordination to make the implementation success more likely.

“A well-planned kickoff meeting sets the tone for a successful project”

Phase II: MSOW Data Conversion & Standardization

Task	Description	Responsible Party	Time Line
Welcome Letter <ul style="list-style-type: none"> • Products Purchased • What will be converted • Acceptable data formats • Conversion mapping documents • Conversion Guide 		Manager Data Conversions	
Set up FTP account		Morrisey	
Initial contact with Sales, prod Managers and Conversion staff			
Conversion Kick-Off	Go over Conversion Guide	Conversion Staff & Client	1 hour session
Mapping session	Go over mapping document	Conversion Staff & Client	1 or 2 hour sessions
Client completes mapping documents	Conversion Staff available to answer questions	Client	2 weeks to 4 weeks
Client sends data	Places data on FTP site	Client	Friday prior to the Start of Prelim Conversion
Data analysis	Contact Client with questions	Conversion Staff	1 week
Prelim Data Conversion	Contact Client with questions	Conversion Staff	2 weeks
Prelim Delivery		Morrisey	
Walk Through Data Conversion	Identify issues	Conversion Staff/Client	1 to 2 hour sessions
Client Data-Review	Identify any new issues and report to conversion staff	Client	1 to 2 weeks
Data Refresh	Fix issues found during data review	Morrisey	Just prior to SAT training
Data Sign off sent		Conversion Staff	Sent 30 days prior to Go-Live
Data Sign off returned	Client Signs and Faxes back	Client	2 weeks prior to Go-Live
Client sends final cut of data and back up of MSOW database		Client	Friday prior to the Start of Final Conversion
Final Data Conversion		Conversion Staff	1 week
Final Data Delivery		Morrisey	
Go-Live Support		Conversion Staff	1 week

Conversion Documents

4.1. Deliverables

This section lists the tasks and deliverables which will be produced during this conversion project.

Task	Deliverable	Due Date	Owner
Document Data Conversion Requirements	Data Conversion Strategy	7/27/2013	Morrisey Conversion Team
Review of Conversion Guide	Data Conversion Strategy	TBD	Morrisey Conversion Team and Client
Conversion Guide Signed	Data Conversion Strategy	TBD	Client
Delivery of Mapping Documents	Data Conversion Strategy	9/13/2013	Morrisey Conversion Team
Return of completed Mapping Documents-MSO	Data Conversion Strategy	9/13/2013	Client
Define Data Conversion Strategy/Work Plan	Data Conversion Strategy	7/27/2013	Morrisey Conversion Team
Deliver Legacy data to FSP site-MSO	Data Conversion Strategy	9/13/2013 3 PM CST	Client
Design and Code Data Conversion Modules-MSO	Data Conversion Module	9/16/2013-10/4/2013	Morrisey Conversion Team
Design and Code Data Conversion Taxonomy tool	Taxonomy Module	9/23/2013-10/4/2013	Morrisey Conversion Team
Completion and review of Taxonomy tool-MSO	Taxonomy Module	9/30/2013	Client
Perform Conversion Module Test	Conversion Module Test Results	9/16/2013-10/4/2013	Morrisey Conversion Team
Convert and Verify Data	Converted and Verified Data	9/16/2013-10/4/2013	Morrisey Conversion Team
Delivery of Phase	Data Conversion Module	10/7/2013	Morrisey Conversion Team

Morrisey Conversion Guide

1. Conversion Guide Introduction

This document is used to determine the strategy for alling in the conversion of your legacy system into MSOW. The Data Conversion Strategy is intended to provide a roadmap for performing the conversion of data from that legacy system to the new MSOW. The tasks and resources needed to fulfill this strategy are also discussed in this document. The strategy in this document is based upon past conversion methods and best practices for MSOW.

The Data Conversion Strategy is used as follows:

- The Conversion Team uses this document to communicate to the client the strategy for successfully converting their legacy data to the new MSOW system.
- The Conversion Team uses this document as a roadmap into performing the conversion. All members of the team should understand and follow the same strategy.
- The Project Manager uses this document to understand how the conversion team plans to perform the conversion, and how the conversion effort may impact the overall project.


The Data Conversion Strategy needs to be read by the following:

- The Client Project Leader who should sign off the conversion requirements and strategy.
- Each member of the Conversion Team.
- Members familiar with the backend of the legacy system, IT staff.
- Members familiar with workflow and data entry, order entry/managed care staff.
- The Project Leader who needs to review and determine what other groups should be given the document.

Use the following criteria to review this document:


- Is the strategy understood by those on the distribution list for this document?
- Are all assumptions, constraints, and risks which could impact the conversion process stated and understood?

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Implementation Challenges

- » Standardization
- » Skill sets across a broad system
- » Late adopters
- » Impact of other IT projects / availability of technical resources



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Team Breakdown by Stage

Project Stage		Hours Designated
Testing the water	<ul style="list-style-type: none"> • Provided sample data to Morrisey • Interviewed other MSOW clients 	35
Launch	<ul style="list-style-type: none"> • Scripps Credentialing began meetings • Professional staff Introduced 	70
Data mapping	<ul style="list-style-type: none"> • MSOW data mapped • Cleaned up data 	100
PCCB activation and overview	Built all Scripps privilege forms in PCCB; additionally developed specialty specific multi-facility privilege forms	80
Preliminary data conversion	<ul style="list-style-type: none"> • Mapped specialties with taxonomy tool • Cleaned up data 	60
Go Live	On target date	18

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What We Did Right, and What We Could've Done (Even) Better

- Assessing time allotment for pre-conversion tasks, especially data cleaning
- Analyzing workflows & process integration between credentialing & enrollment
- Prepared users through extensive exposure to MSOW prior to Morrisey on-site training

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Scripps Health: MSOW Implementation Approach

Significant Milestones

- Data conversion
- Employee preparation
- Enterprise preparations
- Apogee preparation

Strategies

- Intense data review & cleanup
- Regular team meetings in both offices for system exploration, process discussions, project updates
- Team vs. individual preparation tasks
- Super Users and in-house trainers
- Two dedicated IT resources – who joined every call!

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Phase III: Build and Testing

Implementing MSOW & Apogee


Project Stage	Scripps Health Tasks	Hours Designated
Implementation	<ul style="list-style-type: none"> • Built reports • One week MSOW immersion prior to Morrisey arrival • Apogee training integrated into regular work time 	200 (Credentialing Team)
Data clean-up	<ul style="list-style-type: none"> • Practitioner addresses corrected • Checklists from old system changed to processes in MSOW • Normalized all data fields 	500 (Credentialing Team)
Internal planning meetings	<ul style="list-style-type: none"> • Reviewed existing workflows • Discussed potential improvements • Proposed & tested new processes 	120 (All Teams)
Post go-live	<ul style="list-style-type: none"> • Additional Forms Editor documents • Adding processes to practitioners • Webi Reports • Building reports in Crystal for external clients • HL7 Interface planning 	400 (Credentialing Team)

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Scripps & Morrisey Consulting

- Preparation
 - » Training Format
- Consultant Recommendations
 - » Training Approach
 - » 2 SAS Events
 - » 2 Go Live Events



- Allowed for appropriate time between MSOW and Apogee rollouts (find length)
- Apogee – there was no data to convert. Data conversion updated database to share records with Apogee using business rules


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What We Did Right, and What We Could've Done (Even) Better

Unique to Scripps

- IS Project Manager and DBA liaison
- Decisions and timelines were centralized to prevent delays
- Detailed tracking spreadsheets to watch out for creep 🤔
- Working with team members across a system...some that used a manual, paper process with no computer support.
- Team worked an average of 115 hours weekly on implementation for MSOW.
- Teams were not asked to work outside of normal business hours.
- Credentialing team only saw a 5 day "slide" on turn-around-time during conversion.

Continuous celebrations and "Day Away from MSOW" held





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Scripps Health: MSOW Implementation Timeline



Users are more open to new technology if there are fewer changes to the daily routine.

Project Stage	Scripps Health Tasks	Hours Designated
Data clean-up	Ongoing as we discovered things that we used as "work arounds" in MSO didn't "translate" in the best manner to MSOW	80 and counting (All Teams)
Weekly status meetings	<ul style="list-style-type: none"> • Reviewed workflows • Addresses issues • Discussed potential improvements • Proposed & tested new processes 	30 minutes 1x a week (All Teams)
Monthly Refresher Courses	<ul style="list-style-type: none"> • Users set the Agenda based on need 	4 hours x1 month (Credentialing Team)
Restoration of standard reports	<ul style="list-style-type: none"> • Provider lists • Monthly and quarterly reports 	360 (before and after conversion)


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Scripps Health: MSOW Implementation Timeline

MSOW Module	Notes
Data standardization and mapping	March 2012
Data Clean Up	April 2012
Installation and Go-Live	November 2012
Acceptance Testing	December 2012
Privilege Inquiry	December 2012
PCCB - 200+ privileges converted from paper to electronic	January 2013 - March 2013*
eDelineate & FPPE Conditions Manager	March 2013 - June 2013*
Apogee Go-Live	March 2013


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Scrrips: MSOW Implementation Timeline (Continued)

MSOW Module	Notes
FPPE Conditions Manager	June 2013
Webi	May 2013
HL7 real-time interface to Epic	In process
MSOW with faxing	June 2013
PSV Letters	July 2013
Online Application/PHP	In Process
HL7 Interface	In Process
Administrative Review Module	Late 2013 - Early 2014

Scrrips Health: Final Analysis

Take Aways

- It's just MSO with a W!
- Start clean, stay clean
- Have reporting needs prioritized and be prepared in advance
- Use visual representation of the environment as a conversion tool
- Revisit project tasks and make time to ensure understanding of each step
- Get verbal & visual feedback to ensure shared understanding of conversion
- Have all users work together for mutual understanding of database use
- New ideas take time to get used to!



Scripps Health: Final Analysis

Highest Value in conversion experience

- Credentialing office week-long review of MSOW prior to on-site training
- Credentialing office assigned PDCA initiative for evaluation
- Health Plan carved out time to specifically address Apogee conversion issues

What we missed

- Anticipation of impact of MSO “work arounds” on conversion
- Crystal Reports, learning, design and building
- Building a group understanding of MSOW usage, such as the Taxonomy and Specialty tables

Recommendations



Recommendations to Morrisey

- Add Process and Reporting section to project timeline
- Provide a “things to consider” with each module

Recommendations to Clients

- Perform clean-up early (makes data conversion documentation easier)
- Keep data clean
- Understand differences between current system and MSOW—some data divided in one database may be combined in another

Q & A



Next Year.....

Morrisey Annual User Group 2014
If you would like to share your MSOW implementation experience at next year's conference please let us know!!

Morrisey Forum
<http://www.morriseyonline.com/snitzforum/>

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