Implementing MSOW: Tips for Success from Lessons Learned

Presented by:
Maggie Palmer, MSA, CPCS, CPyms, FACHE
Scripps Health

Annette Martyn MSOW Project Manager
(formerly Application Specialist)

Ellen Chappe MSOW Manager of Data Conversion

Jennifer Green MSOW Project Manager

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 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

General Overview of Implementation

Phase I: Installation and Kick Off

Phase II: Data Conversion

Phase III: Build and Testing

Phase IV: Go Live

Phase V: Post Go Live Modules

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
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

Conversion Documents
Implementation Challenges

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

WARNING!
DATES ON CALENDAR ARE CLOSER THAN THEY APPEAR

Scripps Health Team Breakdown by Stage

<table>
<thead>
<tr>
<th>Project Stage</th>
<th>Hours Designated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Testing the water</td>
<td></td>
</tr>
<tr>
<td>- Provided sample data to Morrisey</td>
<td>35</td>
</tr>
<tr>
<td>- Interviewed other MSOW clients</td>
<td></td>
</tr>
<tr>
<td>Launch</td>
<td></td>
</tr>
<tr>
<td>- Scripps Credentialing began meetings</td>
<td>70</td>
</tr>
<tr>
<td>- Professional staff introduced</td>
<td></td>
</tr>
<tr>
<td>Data mapping</td>
<td></td>
</tr>
<tr>
<td>- MSOW data mapped</td>
<td>100</td>
</tr>
<tr>
<td>- Cleaned up data</td>
<td></td>
</tr>
<tr>
<td>PCCB activation and overview</td>
<td>90</td>
</tr>
<tr>
<td>- Built all Scripps privilege forms in PCCB: additionally developed specialty specific multi-facility privilege forms</td>
<td></td>
</tr>
<tr>
<td>Preliminary data conversion</td>
<td>60</td>
</tr>
<tr>
<td>- Mapped specialties with taxonomy tool</td>
<td></td>
</tr>
<tr>
<td>- Cleaned up data</td>
<td></td>
</tr>
<tr>
<td>Go Live</td>
<td></td>
</tr>
<tr>
<td>- On target date</td>
<td>18</td>
</tr>
</tbody>
</table>

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
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!

### Phase III: Build and Testing

<table>
<thead>
<tr>
<th>Project Stage</th>
<th>Scripps Health Tasks</th>
<th>Hours Designated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implementation</td>
<td>• Built reports&lt;br&gt;• One week MSOW immersion prior to Morrisey arrival&lt;br&gt;• Apogee training integrated into regular work time</td>
<td>200 (Credentialing Team)</td>
</tr>
<tr>
<td>Data clean-up</td>
<td>• Practitioner addresses corrected&lt;br&gt;• Checklists from old system changed to processes in MSOW&lt;br&gt;• Normalized all data fields</td>
<td>500 (Credentialing Team)</td>
</tr>
<tr>
<td>Internal planning meetings</td>
<td>• Reviewed existing workflows&lt;br&gt;• Discussed potential improvements&lt;br&gt;• Proposed &amp; tested new processes</td>
<td>120 (All Teams)</td>
</tr>
<tr>
<td>Post go-live</td>
<td>• Additional Forms Editor documents&lt;br&gt;• Adding processes to practitioners&lt;br&gt;• Web Reports&lt;br&gt;• Building reports in Crystal for external clients&lt;br&gt;• HL7 Interface planning</td>
<td>400 (Credentialing Team)</td>
</tr>
</tbody>
</table>

### 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
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

Scripps Health: MSOW Implementation Timeline

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

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<th>Project Stage</th>
<th>Scripps Health Tasks</th>
<th>Hours Designated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data clean-up</td>
<td>Ongoing as we discovered things that we used as “work arounds” in MSO didn’t “translate” in the best manner to MSOW</td>
<td>80 and counting (All Teams)</td>
</tr>
</tbody>
</table>
| Weekly status meetings | • Reviewed workflows  
  • Addressed issues  
  • Discussed potential improvements  
  • Proposed & tested new processes | 30 minutes 1x a week (All Teams) |
| Monthly Refresher Courses | Users set the Agenda based on need | 4 hours 1x month (Credentialing Team) |
| Restoration of standard reports | • Provider lists  
  • Monthly and quarterly reports | 360 (before and after conversion) |

Scripps Health: MSOW Implementation Timeline

<table>
<thead>
<tr>
<th>MSOW Module</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data standardization and mapping</td>
<td>March 2012</td>
</tr>
<tr>
<td>Data Clean Up</td>
<td>April 2012</td>
</tr>
<tr>
<td>Installation and Go-Live</td>
<td>November 2012</td>
</tr>
<tr>
<td>Acceptance Testing</td>
<td>December 2012</td>
</tr>
<tr>
<td>Privilege Inquiry</td>
<td>December 2012</td>
</tr>
<tr>
<td>PCCB - 200+ privileges converted from paper to electronic</td>
<td>January 2013 - March 2013*</td>
</tr>
<tr>
<td>iStatlab &amp; FPPE Conditions Manager</td>
<td>March 2013 - June 2013*</td>
</tr>
<tr>
<td>Apogee Go-Live</td>
<td>March 2013</td>
</tr>
</tbody>
</table>
Scripps: MSOW Implementation Timeline (Continued)

<table>
<thead>
<tr>
<th>MSOW Module</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>FFPE Conditions Manager</td>
<td>June 2013</td>
</tr>
<tr>
<td>Web</td>
<td>May 2013</td>
</tr>
<tr>
<td>HL7 real-time interface to Epic</td>
<td>In process</td>
</tr>
<tr>
<td>MSOW with faxing</td>
<td>June 2013</td>
</tr>
<tr>
<td>PSV Letters</td>
<td>July 2013</td>
</tr>
<tr>
<td>Online Application/PHP</td>
<td>In Process</td>
</tr>
<tr>
<td>HL7 Interface</td>
<td>In Process</td>
</tr>
<tr>
<td>Administrative Review Module</td>
<td>Late 2013 - Early 2014</td>
</tr>
</tbody>
</table>

Scripps 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!

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/