OncoEMR Implementation Approach

Flatiron is committed to partnering with you to ensure that your OncoEMR implementation is successful. The information in this document is meant to provide you with an overview of what to expect and recommendations on how to facilitate a smooth transition to OncoEMR. It is important that you recognize that this document reflects our general approach to implementation, however, the specific details are subject to change based on the particular circumstances related to your implementation, or changes in our internal policies and procedures. More detailed information about your implementation will be provided as part of the project plan during the Discovery & Planning phase of the implementation.

1.   *Keys to a Successful Implementation*

Partnership between Flatiron and your organization
We have found that the most successful implementations are the result of effective partnerships between Flatiron and the Client. The process we've designed based on our experience splits ownership of specific tasks between individuals within your organization and those within Flatiron. It's extremely important to have strong project leadership and active engagement by stakeholders and staff across your organization.

Investing time and resources
During the implementation your staff will be trained on how to configure OncoEMR to fit your organization's needs. Clients who invest appropriate time and resources into learning how to manage the application during implementation are more empowered to maximize the benefits that OncoEMR provides.
We employ a combination of direct end-user and "train the trainer" training methodologies to ensure that your staff receives the education required to effectively use, maintain, and optimize OncoEMR. Ensuring that all users are able to dedicate sufficient time to attending training sessions is critical to system adoption and the success of both the implementation and long-term life of the system.

Ensuring consistent workflows
In order to maximize workflow and process efficiency, we have developed recommended workflows within OncoEMR. Following these workflow ensures that good habits are established and desired results are achieved.
While we recommend that you follow these workflows as closely as possible, we recognize that each organization is unique and may need to deviate from them. As part of your implementation, we will work with you to customize these workflows where necessary.

2.   *Flatiron OncoEMR Implementation Team*

Role	Responsibilities
Project Manager	- Serve as your primary point of contact during the implementation - Lead overall project, scoping, status/issue tracking, and progress - Surface critical dependencies and mitigate project risks - Deploy proven process and methodology to ensure success
Implementation Specialist	- Serve as your primary training contact during the implementation - Advise on workflow design / best practices and guide OncoEMR configuration & build

	- Lead project team and end user training to ensure successful go live
Training Specialist	- Assist Implementation Lead with end-user training and go-live support as needed
Interface Engineer	- Determine specifications for, configure, and test interfaces alongside vendor representatives - Plan, conduct, and mitigate risks related to data conversion

3.   *Client Project Team Members*

NOTE: While this represents the required Client Project Team members, additional roles will be determined with your organization based on organization details provided during the implementation planning process. Additionally, for smaller practices, one person may play multiple roles.

Role	Responsibilities
Project Manager	- Serve as Flatiron's primary point of contact during the implementation - Facilitate organization and communication across Project Team members, end-users, Subject Matter Experts, etc. - Work with the Flatiron Implementation Lead to ensure tasks are assigned and completed on time - Help identify and mitigate risks to go-live plan
Clinical Content Builder	- Build clinical content into OncoEMR, including but not limited to regimens, ordersets, formulary, and documentation templates - Provide clinical insight and guidance throughout the implementation
Physician champion	- Drive input and buy-in from other physicians, providers, and stakeholders - Review and/or ensure other providers review clinical content, including but not limited to regimens, ordersets, documentation templates - Provide a physician's perspective to workflow design, policy decisions, and other project initiatives - Ensure physicians and other providers attend required end-user training sessions
Subject Matter Experts	- Own location and user setup - Provide workflow guidance and configuration / conversion for scheduling, billing and IT interfaces

4.   *Implementation Phases and Responsibilities*

There are 6 phases to the OncoEMR implementation process. Below are descriptions of the phases and each team's core responsibilities.

0. Pre-Implementation	
Description	After the OncoEMR contract has been signed, your Flatiron Implementation Team will be assigned and contact you to schedule an introductory call. In the meantime, there are a few tasks listed below that you can begin working on right away.

Flatiron Core Responsibilities	- Review client information to prepare for implementation - Identify Flatiron Implementation Team members - Coordinate initiation of Discovery & Planning phase with client

Client Core Responsibilities	- Determine Interface scope
	    ● Contact your internal IT resources and existing external vendors to notify them of the interfaces being requested and identify any associated fees
	    ● For new vendors, inquire as to the time they require to complete the work and if there are any associated fees
	- Determine Governance Committee & Subject Matter Experts
	    ● Identify key stakeholders within your organization that can make clinical, workflow, and policy decisions as they relate to the implementation
	- Establish Project Team
	    ● Identify the appropriate staff members to fill the roles outlined in the Client Project Team Members section above
	- Initial Regimen and Workflow Review
	    ● Gather, review, standardize, and consolidate your current-state regimens (this must be complete before your Project Team can begin building regimens in OncoEMR)
	    ● Identify areas for optimization/improvement in current-state workflows

1. Discovery & Planning

Description	Analyze current state, define project scope, and construct the detailed implementation project plan. Based on the complexity of your organization, we will work with you to determine additional resources that you will need to allocate to the project.
Flatiron Core Responsibilities	- Lead kickoff call with Client Project Team - Create implementation scope and project documents, including detailed project plan - Observe and document current-state workflows and integrations
Client Core Responsibilities	- Introduce your internal Project Team and kick off implementation with the Flatiron Implementation Team - Facilitate current-state discovery with the Flatiron Implementation Team - Define and approve project scope and detailed project plan with your Flatiron Implementation Lead - Standardize clinical content (regimens, ordersets, etc.)

2. Workflow Design & Validation

Description	Define, validate, approve, and document end-state workflows and integration points. During this phase, your Project Team will also be trained on OncoEMR.
Flatiron Core Responsibilities	- Design, validate, and document end-state workflows and integration points - Define interface scope, including but not limited to message type, direction, and frequency - Define Key Performance Indicators and reporting requirements - Create finalized interface diagram - Train Client Project Team on OncoEMR

Client Core Responsibilities	- Facilitate workflow and interface validation - Approve end-state workflows and integration points - Approve interface scope, including but not limited to message type, direction, and frequency - Standardize clinical content (regimens, ordersets, etc.)
3. Build	
Description	Configure OncoEMR based on approved workflow design. Build and review regimens and ordersets.
Flatiron Core Responsibilities	- Support and guide Client Project Team through OncoEMR configuration and regimen/orderset build/review - Engage and provide regular progress updates to project and executive leadership - Work with other vendor representative(s) to configure and test interfaces - Develop regimen/orderset and data conversion plans with Client Project Team
Client Core Responsibilities	- Configure OncoEMR, including but not limited to users, locations, resources, formulary, tests, and note templates - Build and review regimens and ordersets
4. Testing	
Description	Test OncoEMR configuration through workflow and integrated testing.
Flatiron Responsibilities	- Conduct workflow and integrated testing alongside Client Project Team
Client Responsibilities	- Conduct workflow and integrated testing alongside Flatiron Implementation Team
5. Training & Conversion	
Description	Train end-users. Conduct appointment, regimen/orderset, and data conversion in preparation for go-live.
Flatiron Responsibilities	- Conduct end-user training (or utilize "train the trainer" model per your organization's structure) - Support Client Project Team in appointment and regimen/orderset conversion activities - Conduct data conversion
Client Responsibilities	- Facilitate end-user training (or train end-users per your organization's structure) - Conduct appointment and regimen/orderset conversion - Validate data conversion
6. Go Live	
Description	Provide go-live support and triage/resolve issues.

Flatiron Responsibilities	- Deploy go-live support staff to provide elbow support for end-users - Triage and resolve issues alongside Client Project Team - Introduce your Customer Success Team - Post go-live: Conduct post-live check-in
Client[1] Responsibilities	- Deploy additional go-live support staff to provide elbow support, as needed - Triage and resolve issues alongside Flatiron Implementation Team

OncoEMR Implementation FAQs

Q: When will I go live?

A: Your Flatiron implementation team will work with you to establish a go-live date during the Discovery & Planning phase based on:

- Project scope
- Your organization's size and complexity
- Your organization's dedicated project resources
- Other vendors/interfaces
- Holidays, staff availability, and other organizational initiatives
- Flatiron Go Live schedule and OE Implementation Team availability

Q: What can I do to help make my implementation successful?

A: We have found that the most successful implementations include the following:

- Strong organizational leadership committed to the project and able to motivate organizational staff
- Appropriate staff and time allocated to the project, based on recommendations from the Flatiron team provided during the Discovery & Planning phase, including Physician Champion and SMEs for Billing, IT, Nursing and Scheduling
- Active engagement by and regular, consistent communication across all involved parties
- Standardized workflows (to eliminate confusion and accelerate learning curve)
- Early and comprehensive user training
- Reduced patient schedule for Go Live week

Q: What data will convert from my old EMR?

A: Each vendor has a different set of data elements that they can provide us for loading into OncoEMR. Refer to your contract or Flatiron sales contact for more info.

Q: What data will I have to enter manually?

A: There are some data elements that cannot be electronically converted and will need to be entered manually by your organization. These include but are not limited to:

- Regimens and ordersets
- Orders
- Appointments
- Historical Treatment Plans/Flowsheets/MARs (print and scan)

Q: Are there third party add-ons I will need in order to use OncoEMR?

A: To use OncoEMR, you must enable the following third party applications:

- OpenText, Interfax, PGI: inbound/outbound e-faxing within OncoEMR
  - Signup instructions will be provided during implementation.
- MaxMD: direct messaging/electronic referrals
  - Signup instructions will be provided by your Flatiron account representative.
- DrFirst: Electronic prescribing of controlled substances
  - Signup instructions will be provided by your Flatiron account representative.

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