OncoCloud Software Implementation Approach

Flatiron is committed to partnering with you to ensure that your OncoCloud software (OncoEMR, OncoBilling) 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 the OncoCloud software platform. It is important to 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 Discovery & Planning phase of the implementation.

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 you, our 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 is extremely important to have strong project leadership and active engagement from stakeholders and staff across your organization.

Investing time and resources

During the implementation, your staff will be trained on how to configure the OncoCloud software 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 the OncoCloud platform 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 the OncoCloud software from go-live and beyond. It is critical that all users are able to dedicate sufficient time to attend training sessions in order to drive system adoption and success of both the implementation and long-term use of the system.

Ensuring consistent workflows

In order to optimize workflow and process efficiency and ensure effective training and support, we have developed recommended best practice workflows within the OncoCloud system. Following these workflows ensures that users establish good organizational and individual habits allowing for desired results to be achieved. While we emphatically suggest that you follow these workflows as closely as possible, we recognize that each organization is unique

and may need to deviate from them under certain prescribed circumstances. As part of your implementation, we will work with you to customize these workflows where necessary.

Flatiron OncoCloud Implementation Team

Role	Responsibilities
Project Manager	- Healthcare IT project management expert - Serve as your primary point of contact during the implementation - Lead overall project management, scoping, status/issue resolution, and progress tracking - Surface critical dependencies and mitigate project risks - Deploy proven process and methodology to ensure successful implementation
Implementation Specialist	- OncoCloud product expert and oncology practice operations consultant - Advise on workflow design and best practices to guide OncoCloud configuration and build - Lead project team, super user and end user training to ensure successful go-live
Interface Engineer	- Healthcare IT data integration expert - Determine specifications for, configure, and test interfaces alongside vendor representatives - Plan, conduct, and mitigate risks related to, data conversion from legacy systems

Client Implementation Project Team

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

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, key practice stakeholders, subject matter experts, etc. - Work with the Flatiron Implementation Project Manager to ensure tasks are assigned and completed on time

	● Help identify and mitigate risks to go-live plan
Physician Champion	● Drive input, buy-in, and participation from other providers and key practice stakeholders ● Review and/or ensure other providers review clinical content, including but not limited to regimens, ordersets, and visit note templates ● Provide physician's perspective on workflow design, policy decisions, and other project initiatives ● Ensure physicians and other providers attend required end user training sessions
Nurse Champion	● Oversee regimen strategy, build, and review ● Provide nursing perspective on workflow design, policy decisions, and broader project initiatives
Operational, Clinical and Billing Content Builders	● Build operational, clinical and billing content into OncoCloud products, including but not limited to locations, users, regimens, ordersets, formulary, visit and text note templates, fee schedule, payer information ● Provide operational, clinical and billing insights and guidance throughout the implementation
Subject Matter Experts	● Provide workflow guidance and support for each functional area including, but not limited to nursing, scheduling, pharmacy, lab, billing, IT, interfaces
IT Lead	● Coordinate with 3rd party vendors to complete interface setup ● Lead technical setup to ensure practice meets OncoCloud system hardware and software requirements

<u>Implementation Phases and Responsibilities</u>

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

Phase 0: Pre-Implementation	
Goals	● Initial team introductions and expectation-setting ● Practice research and pre-work to facilitate project kickoff
Flatiron Responsibilities	● Review Client information to prepare for implementation ● Identify Flatiron Implementation Team members ● Coordinate initiation of Discovery & Planning phase with Client, beginning with kickoff call

Client 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 and improvement in current-state workflows

Phase 1: Discovery and Planning

Goals	• Document and analyze current-state end user and administrative workflows • Define the OncoCloud application implementation scope ○ Note: the integration scope will continue to be developed through Phase 2 - Workflow Design and Validation • Construct a detailed implementation project plan and timeline • Determine the required Client resources for implementation tasks • Establish project governance structure
Flatiron Responsibilities	• Lead kickoff meetings with full project team • Create implementation scope and project documents, including a detailed project timeline • Observe and document current-state workflows
Client Responsibilities	• Identify the practice project team and project stakeholders • Facilitate current-state discovery with the Flatiron project team • Define and approve project scope and detailed project plan with the Flatiron Project Manager

	• Gather and standardize existing clinical content (regimens, ordersets, documentation note templates, etc.) • Review and plan for OncoCloud system technical requirements (e.g. browser, faxing, scanning)

Phase 2: Design and Validation

Goals	• Design, document, validate and approve end-state OncoCloud workflows and points of integration • Train the Client project team on OncoCloud configuration and administration • Finalize the scope of integration
Flatiron Responsibilities	• Design, validate and document end-state OncoCloud workflows and points of integration • Finalize integration scope, including interface message type, direction and frequency • Create final interface diagram • Train Client project team on OncoCloud system configuration and administration
Client Responsibilities	• Facilitate workflow and interface validation meetings and decision-making • Approve end-state OncoCloud workflows and points of integration • Approve integration scope

Phase 3: Configuration Build

Goals	• Configure OncoCloud software according to the approved workflow design • Configure and build OncoEMR regimens and ordersets • Configure and test interfaces among the OncoCloud system and other Client systems
Flatiron Responsibilities	• Support and guide Client through OncoEMR configuration and the build and review of regimens and ordersets • Engage with and provide regular progress updates to project and executive leadership • Work with other vendor representatives to configure and test interfaces

	• Collaborate with Client on developing end-user training schedules and active regimen and appointment conversion plans
Client Responsibilities	• Configure OncoCloud software, including but not limited to users, locations, resources, formulary, tests and documentation note templates • Build and review regimens and ordersets

Phase 4: Testing	
Goals	• Configure integrated testing scripts for OncoCloud workflows • Perform workflow and integrated testing of OncoCloud workflows • Resolve any workflow or interface issues identified during testing
Flatiron Responsibilities	• Collaborate with Client to configure integrated testing scripts for OncoCloud workflows • Track issues identified during testing and advise on resolution plan • Define OncoCloud key performance indicators and reporting requirements
Client Responsibilities	• Conduct workflow and integrated testing in collaboration with the Flatiron team

Phase 5: Data Loading and Training	
Goals	• Conduct end user training • Conduct automated data conversion from legacy EMR • Conduct appointment and active regimen and orderset data loading
Flatiron Responsibilities	• Perform end user (and/or train-the-trainer) training sessions and transfer end user training materials • Conduct automated data conversion from legacy EMR • Support Client in appointment and active regimen and orderset data loading • Conduct 60-day and 30-day go-live readiness assessments

Client Responsibilities	• Facilitate (or conduct) end user training sessions • Validate automated data conversion from legacy EMR • Conduct appointment and active regimen and orderset data loading

Phase 6: Go-Live	
Goals	• Provide go-live support • Triage and resolve issues identified during go-live
Flatiron Responsibilities	• Deploy go-live support staff to provide at-the-elbow support for end users • Triage and resolve issues identified during go-live, in collaboration with Client • Introduce the Flatiron Customer Success Team
Client Responsibilities	• Deploy go-live support staff to supplement the Flatiron Implementation Team members onsite • Triage and resolve issues identified during go-live in collaboration with Flatiron

Phase 7: Post Go-Live Optimization	
Goals	• Continue to track and work through issues identified during go-live • Workflow and functionality optimization • Transition OncoCloud support to the Flatiron Customer Success Team
Flatiron Responsibilities	• Track and collaborate with Client in resolving issues identified during go-live • Transition OncoEMR support to the Flatiron Customer Success Team • Conduct a Post Implementation Review visit • Conduct additional site visits as necessary
Client Responsibilities	• Collaborate with Flatiron in resolving issues identified during go-live

OncoCloud Implementation FAQs

*Q: **When will my practice 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 and complexity
- Your organization's size and complexity
- Your organization's dedicated project resources
- Specifics of 3rd party vendors/interfaces
- Scheduling of holidays, staff availability, and other organizational initiatives
- Flatiron's overall go-live schedule and 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 strong SMEs and operational champions for Pharmacy, Lab, Billing, IT, Nursing and Scheduling
- Active engagement by, and regular, consistent communication across, all involved parties
- Standardized workflows, to reduce confusion, accelerate learning curves, and improve support
- Comprehensive on-site end user and 'super user' training
- Reduced patient schedule for go-live week

*Q: **What data will convert from my legacy EHR or PMS?***
A: Each legacy vendor has a different set of data elements that they can provide us to load into the OncoCloud system. Refer to your contract or Flatiron sales contact for more info.

*Q: **What data will I have to enter manually into the OncoCloud system?***
A: Depending on your legacy EMR system, interfaces scope, and Flatiron sales contract, we will automatically convert and load as many data elements as possible into the OncoCloud system. There are some data elements that cannot be automatically converted and will need to be entered manually by your organization. These include but are not limited to the following:
- Regimens and ordersets (clinical)
- Your organization's drug formulary (clinical)
- Cancer staging details (clinical)
- Active/future patient orders, authorization and appointments (authorizations/scheduling)
- Legacy system accounts receivables (billing)
- Fee schedule and payor-specific allowables (billing)

Q: *Are any third-party applications needed in order to use the OncoCloud platform?*
A: To use the OncoCloud system fully you will need to enable the following third-party applications (instructions will be provided during implementation):

- Optimal web-based access to OncoCloud software: *Google Chrome Browser*
- Electronic prescribing of controlled substances: *DrFirst EPCS Gold*
- Inbound/outbound electronic faxing requires one or more of the following fax vendors: *OpenText, InterFAX, XMediusFAX On-Premises*
- Direct Messaging for sending and receiving electronic referrals: *MaxMD*