



Regional Extension Center Technical Assistance Scope of Work

This Scope of Work details the services Altarum will provide to _____ [Client Name] _____ which qualifies for federally subsidized services as determined by the M-CEITA Regional Manager. In working directly with the Office of the National Coordinator for Health IT (ONC), and as the Regional Extension Center for the state of Michigan, M-CEITA's service offerings will be most effective in not only helping to implement technology in your practice/ CAH/clinic/health center, but also in achieving the benefits of Meaningful Use of health information technology (HIT).

Altarum has designed our technical assistance services, tools, and guidance to most effectively leverage ONC's subsidy in partnership with your practice/CAH/clinic/health center's resources.

Should you wish to discuss services outside of this scope, please do not hesitate to call _____, your M-CEITA liaison, to discuss other support Altarum may be able to provide during your transition to Meaningful Use.

Technical Assistance Offerings

As your partner in achieving Meaningful Use, Altarum provides technical assistance to accelerate your adoption and Meaningful Use of certified electronic health records (EHRs). We recognize that practices/CAHs/clinics/health centers can be in different stages of adoption and use of EHRs/HIT, and offer this tailored service scope to meet your specific needs within the available subsidy.

I. Engagement

Altarum will provide a review of HIT products and capabilities, federal incentive options, workflow design methods, and best practices for deploying technologies in your practice/CAH/clinic/health center. This may be delivered onsite or offsite.

A. Project Planning:

Altarum will help the practice/CAH/clinic/health center develop a written plan reflecting your stage of HIT adoption. This may include one or more of the following: selection, planning for implementation, implementation, and meaningfully using HIT systems to improve clinical outcomes.

1. Roles and Responsibilities

- 1.1. The Altarum team will work cooperatively with the practice/CAH/clinic/health center to identify the roles and responsibilities of the staff as a whole, estimate the time commitment for each stage of the process, as well as define roles for the Altarum team and vendor staff (as applicable) for each service offering group. Project roles and required responsibilities of the practice/CAH/clinic/health center staff will be clearly coordinated, and your M-CEITA liaison will provide an electronic and/or hard copy for review throughout the project.
- 1.2. Your staff will get to know the Altarum team members assigned to your practice during onsite visits, conference calls, workshops, etc. The purpose for this is to get to know what your staff does on a daily basis and how they perform those tasks. Your Altarum team will be available for questions and provide direction for planning the adoption process through collaborative forums and workgroups.

2. Develop Plan

- 2.1. The Altarum team will assist the practice/CAH/clinic/health center in developing a plan for adoption of Meaningful Use. This may include one-on-one interviews, conference calls, group meetings, etc. to understand the practice/CAH/clinic/health center needs within adoption and best practices to achieve adoption in a timely manner.
- 2.2. Additional fee services from Altarum and/or other parties that would benefit the practice/CAH/clinic/health center and/or enhance EHR adoption may be recommended. Your Altarum team will assist your practice/CAH/clinic/health center's efforts to adopt Meaningful Use, even if it falls outside the scope of this document.

B. Current State Process Mapping:

Altarum will assist your practice/CAH/clinic/health center in gathering information on current processes and workflows, collect user requirements, and identify opportunities for system enhancement (with or without technology). This will be a

joint effort with the practice staff so there will be an understanding of process mapping and its utilization now and in the future.

1. Current-State Assessment
 - 1.1 The Altarum team will assist your Practice/CAH/Clinic/Health Center in gathering information on current processes and workflows within the practice.
 - 1.2 The Altarum team will survey your practice processes and work with designated staff for a 1-2 hour focus group.
2. Review of Findings
 - 2.1 Discussions will be held to review findings with the project team on process improvements, requirements, what is working and what is not currently working. This will provide a baseline of current process benefits that must be included with HIT.
3. Current State Completion
 - 3.1 The Altarum team will advise the practice project team on enhancing practice workflows, including a written representation of your current system, requirements for a future system (both to maintain status quo and provide new value) and a list of potential system enhancements.

II. Selection

A. Screening Support:

Altarum will assist the practice/CAH/clinic/health center in completing an EHR selection workbook that will help in preparation for reviewing, comparing, and selecting HIT tools. This will assist you in identifying the primary goals and objectives you wish to achieve from HIT, the features and functions required to support your goals and objectives, and an estimated ROI from the adoption.

1. Group Purchasing
 - 1.1. Altarum will explain group purchasing and what it means to your practice/CAH/clinic/health center. Your M-CEITA liaison will also explain the benefits of Group Purchasing compared to other regional vendor offerings in your area.
 - 1.2. A list of group purchasing vendor options will also be provided as well as other possible options in your area.
2. Selection Workbook
 - 2.1. The workbook will include, but is not limited to, beneficial materials; questions to ask potential vendors, benefit comparison worksheet, and a functional requirements checklist.
3. Return on Investment (ROI)
 - 3.1. Altarum will provide a requirements checklist for potential financial return, patient outcomes, and other measures of value-based ROI. The practice/CAH/clinic/health center will need to evaluate their business case for HIT against the ROI to help measure individualized project goals.
4. Knowledge Sharing
 - 4.1. Altarum will not choose a vendor or certified product for the practice/CAH/clinic/health center – this is the practice’s decision alone. However, your Altarum team will share objective expertise to aid your project team in making an informed decision of vendor and product

B. Simplified Selection:

Based on results from your workbook, system requirements, and our assessment of your practice/CAH/clinic/health center, your M-CEITA liaison will provide you with a short list of certified EHR products that most closely fit your practice’s needs and objectives. This includes EHR/HIT and related service offerings available through our group purchasing initiative, as well as those that may be available through entities including, but not limited to, hospitals, health systems, provider organizations, and physician organizations.

1. Altarum will be actively engaged to evaluate selected system functions and to identify any gaps with the practice’s chosen product.
2. Altarum will aid in verifying vendor equipment requirements and point out any critically necessary hardware/software that should be included.

3. Altarum will be available to join vendor comparison discussions and answer other questions regarding vendors and their respective products. This involvement from your Altarum team is to consistently provide support and to assist in finding the best tools for your practice/CAH/clinic/health center.
4. Should you wish to go outside of the vendor list which Altarum has provided you, we will provide you with our RFP template and join in vendor comparison discussions as requested. This, however, may involve additional fees.

III. Planning

A. Change Management:

Altarum will work with your project team to assist in the planning and execution of process enhancements and culture changes to prepare your practice/CAH/clinic/health center to adopt these new tools and technologies.

1. Business/Environmental Change
 - 1.1. Altarum will advise the practice on how to mitigate the effects of organizational and environmental changes within your practice/CAH/clinic/health center as a result of HIT adoption through evaluating risk, identifying issues, and providing change management education.
2. Product/Project Change
 - 2.1. Altarum will advise on how to facilitate issues identification and resolution, as well as manage changes within the practice/CAH/clinic/health center.

B. Practice/CAH/Clinic/Health Center Preparation:

Altarum will assist the practice/CAH/Clinic/Health Center in identifying clinic/health center expectations, goals, and responsibilities of both the practice/CAH/clinic/health center and the chosen vendor in preparation for implementation.

1. Meaningful Use Preparation
 - 1.1. Altarum will work with your practice to select three Physician Quality Reporting Improvement measures and prepare for other functionality which will be necessary in achieving Meaningful Use.
3. Process Redesign
 - 3.1. To maximize practice workflow and identify the best use of installed technology.
4. Chart Preparation
 - 4.1. Altarum will assist in the preparation which will be necessary in converting presently used paper charts to EMR.
5. Review/Re-evaluate/Revise
 - 5.1. Altarum will assist the practice/CAH/clinic/health center in coordinating specific practice goals with the vendor for the HIT product(s) and developing a supportive comprehensive workflow.
6. Privacy and Security
 - 6.1. The privacy and security for your practice/CAH/clinic/health center is a priority to Altarum
 - 6.2. The Altarum team will work in coordination with the practice management and the chosen vendor to make sure that the product is HIPAA compliant.

The practice/CAH/clinic/health center will need to provide Altarum and the chosen vendor the appropriate information as to who will have supervisory access or privileges in inputting, testing and working with the system.

IV. Implementation

A. Vendor Oversight:

Altarum will work with your team to ensure the vendor completes the agreed upon implementation services including: steps to convert patient information, build templates/forms in the new system, train users, integrate system functionalities, and test the product according to acceptance criteria prior to Go-Live. We will also assist your staff in developing a method to track issues that arise (i.e. bugs or gaps) and at the provider's request, act as a liaison with the vendor to address any such concerns.

1. Confirm alignment of plans between vendor, practice/CAH/clinic/health center and Altarum
2. Monitoring and Tracking Project Plan
 - 2.1. Develop and educate about use of Issues/Risk Log
 - 2.2. How to initiate and manage change requests

- 2.3. Monitor the agreed upon project plan
3. Clinic Implementation Support For:
 - 3.1. Testing
 - 3.2. Support practice/CAH/clinic/health center to vendor relations
 - 3.3. Available for questions regarding process, responsibilities, coordination, etc.
4. Acceptance criteria
 - 4.1. Altarum will act as an advocate for the practice/CAH/clinic/health center in documentation and monitoring of acceptance criteria, product testing, and overall vendor performance in accordance with the contract with the chosen vendor.
5. Altarum and practice/CAH/clinic/health center will develop a follow up plan to review project success and acceptance.

V. Meaningful Use

Meaningful Use (MU) is a term defined by CMS and describes the use of HIT that furthers the goals of information use and exchange among health care professionals to achieve clinical outcomes. Obtaining meaningful use is based upon provider participation. Its success is determined by the degree of provider's engagement and compliance with the necessary criteria. Providers are expected to be full and active participants of the project team, completing action items as needed, and contributing their particular knowledge or experience to team decision-making.

A. Post-Implementation Review (PIR):

Altarum will meet with your project team to discuss what is and what may not be effective and/or meeting expectations for the new system. Altarum and the project team will conduct a Post-Implementation Review (PIR). The PIR is an onsite assessment that reviews the priorities and goals that were originally set after the agreement was signed. During this time we will:

1. Reevaluate goal attainment
2. Assess feedback: examine staff and patient satisfaction
3. Assess the practice/CAH/clinic/health center's ability to fulfill the CMS Meaningful Use criteria.

B. EHR Optimization Plan:

The project team will create and implement an EHR Optimization Plan in which Altarum will assist in creating. An EHR Optimization Plan is a guide that focuses more on using the EHR to improve patient care and quality. It is an ongoing process of continual quality improvement incorporating care management activities. This includes practice/CAH/clinic/health center specific:

1. Care Management – ensure production /creation of patient specific care plan
2. Standardized process of documentation and order creation
3. Adoption of Clinical Decision support tools to effectively make use of best practices and evidence
4. Adoption of Coordination Tools
5. Feedback: Staff and Patient survey
6. Identifying benchmarks

C. Sustainment:

Altarum will work with your project team to build reporting mechanisms (including those required for Meaningful Use as defined by CMS), while sustaining Meaningful Use of the system, and identifying further technology adoption opportunities and leverage your practice's capabilities and clinical outcomes through enhanced technology.