Connect Care Readiness Playbook Summary for Physician Leaders

Launch 9, Chapter 4: Engagement Readiness

June 14, 2024

Welcome to the Readiness Playbook Summary for Physicians

Connect Care will be rolled out across the province over nine Launches. The Readiness Playbook will guide operational leaders in preparing for launch starting one year before launch. The six Readiness Playbook chapters will be released on a set schedule, based on the Prosci ADKAR® model that guides individual and organizational change. ADKAR is an acronym that represents the five tangible and concrete outcomes an individual must achieve for lasting change: **A**wareness, **D**esire, **K**nowledge, **A**bility and **R**einforcement.

The Readiness Playbook contains relevant information based on the Launch 's stages of launching Connect Care. Tasks within the Playbook are organized as work packages which could have impact on physician workflows and require physician input. If this is the case it will be identified in this summary.

We encourage you to team up with your operational leader dyad to learn more about the Playbook. Some of the operational resources from the Playbook might be of interest to you or your physician group which includes resources for coaching, change management, dealing with resistance and eHealth competency.

Information for Physicians

eHealth Literacy

Physicians may be concerned that Connect Care will require them to interact with a larger volume of information at a higher level of complexity in the normal course of providing patient care. Connect Care is not just an electronic filing cabinet filled with patient records, rather it is a tool to improve the health of Albertans.

One way that we are preparing physicians for Connect Care is by developing eHealth Literacy resources. These resources offer physicians tools that will help them appropriately retrieve, understand, and appraise information, and also create information which will be accessed by others.

Available Resources:

- Privacy, eSafety, Minimum Use Norms, Clinical Information Sharing Approach

Physician Principal Investigators

Research Integration

All physician tracks will include a demonstration showing how to identify:

1. Research patients from the Storyboard (for pathology from the patient header)
2. Research orders from Chart Review

Research Functionality/Workflows

As part of each physician training track, there will be an optional exercise to teach order-study linking. Principal investigators will be encouraged to complete this exercise.

Additional training is not required for many principal investigators, because their research staff will receive training in and access to the Connect Care CIS; they will be able to complete the workflows within Connect Care. Those physician investigators who have small (or no) research teams will have the option to complete the Research Staff training. If you are a principal investigator who would like to participate in this additional training, please email help.cmio@ahs.ca.

In Basket and Task Management

In Basket

In Basket can be used to communicate with colleagues and patients, in a manner similar to email. However, unlike email, In Basket messages present with links to relevant information, charting tools and decision supports within the Connect Care ecosystem. Patients can be included in the circle of communication if they use MyAHS Connect, the Connect Care patient portal.

In Basket communications can only be shared with clinicians who have adopted Connect Care or who have registered for its provider portal. AHS secure email is the preferred tool for communicating with external physicians until Connect Care becomes widely adopted throughout a zone.

The "In Basket Basics" section of the In Basket Best Practices Guide provides an excellent introduction to the layout and functions of In Basket in Hyperspace.

Task Management

Clinicians receive messages about tasks via In Basket. These messages are directly linked to patients' charts, results and orders, making it easier to both appreciate and act on what needs doing. The tasks themselves can be managed (redirect, complete, share, etc.) from buttons in the In Basket task bar. Common tasks include:

- Reviewing laboratory and imaging results.
- Resolving incomplete documentation, open charts, co-sign needs or requested corrections.
- Accepting tasks sent to a pool (e.g., triage of incoming referrals).
- Delegating clinical coverage for In Basket work to other colleagues.

Routine attention to, and action upon, In Basket tasks can dramatically reduce Connect Care information burdens. However, neglect can lead to a large, cluttered and daunting tool that takes time to clear. Physicians who are off-service for prolonged periods can configure In Basket to send periodic email alerts about accruing tasks.

Physician Training Program

Privacy Training

Prior to receiving access to Connect Care, physicians are required to take their privacy training and "InfoCare: On Our Best Behaviours" (OOBB) on MyLearingLink.

Registration Process

Medical Affairs and the Associate Chief Medical Information Office (ACMIO) in each Zone have validated the physician list for Launch 9 to ensure that these physicians are in the correct Launch and training track(s).

Medical Affairs will communicate with physicians what Launch 9 physicians will self-register for their approved training tracks via MyLearningLink. They will be able to select their preferred training date and time (if multiple sessions are available) for both Basic and Personalization training.

A report on registration numbers will be made available to senior leadership.

eLearning Courses and Preperation

MLL is used to access Connect Care eLearning and supplemented courses featuring workflow demonstrations, specialty content and mobile which can be searched by specialty or need.

Connect Care Virtual Login Lab

A "virtual login lab" allows physicians to confirm that they have access to the right tools in the right way. Follow these steps (in order):

- Login to myapps.ahs.ca and launch Connect Care production (PRD).
- At the Hyperspace login screen, enter the correct AHS username and password.
- If multiple "jobs" are presented (multi-role physician), complete the rest of this process for each in turn.
- When asked for a "Department" to open Hyperspace with, choose the appropriate zone virtual clinical department (e.g., Edmonton Zone Cardiology, Edmonton Zone Pediatrics).
- Once opened into Hyperspace, use the search function (top-right corner), type "CMIO" and jump to the "CMIO Login Labs Info" activity option. Alternately, select the top left "Epic" button, then "Help", then the "CMIO Login Labs Info" menu item.
- Examine the information provided and complete the linked survey to indicate whether your roles and templates appear correct.

Access Problems

If access is frustrated by username or password failure, and you have time, consider fixing the password problem yourself. There is a self-service password reset tool available through the Identity and Access Management (IAM) portal (need to do this from within an AHS network or have a working RSA SecurID token):

- Log in to IAM (iam.ahs.ca) with your AHS ('Healthy' network) username and password (note that the password is your RSA FOB code if connecting from outside an AHS network).
- Click on "Forget Password" or "Locked Out?" (Password Reset Guide)
- First visit to IAM? Set up Your Security Profile

It is important to know what to do in the event that one cannot get in to Connect Care when clinically active. If a clinician loses access previously provisioned, or otherwise cannot get in to Connect Care, and is on active clinical duty, call the IT Service Desk (1-877-311-4300) to request emergency help. The help desk knows that this is a top priority. Be ready with your full name and clinical role.

Connect Care Environments

Connect Care uses Epic Systems Corporation clinical information system (CIS) software, with multiple instances allowing testing, training and development activities to be separated from clinical use of the production CIS. Each instance is referred to as an "Environment".

ACE - Training

- Used for classroom training
- Refreshed: Nightly from PREP
- Interfaces: None
- Users: All users participating in training sessions
- Requirements: None
- Logon: model accounts

DMO - Demonstration

- Used by analysts, informaticians and clinician leaders to demonstrate functionality prior to release of training environments (deprecated at training, do not use)
- Refreshed: Weekly (Mondays) from POC
- Interfaces: None
- Users: IT, CMIO Physician Leads, CKCM, AHS Analytics, Human Factors, HIM, HPSP, Trainers, Power Users
- Requirements: Epic Fundamentals Training
- Logon: model users

EXAM - Proficiency

- Used for classroom training proficiency examination
- Refreshed: Nightly from PREP
- Interfaces: None
- Users: All users participating in training sessions
- Requirements: None
- Logon: model accounts

PLY - Learning

- Used for practice after basic training
- Refreshed: Nightly from PREP
- Interfaces: None
- Users: All users with DMO access plus all users with basic training
- Requirements: Basic Training
- Logon: model accounts

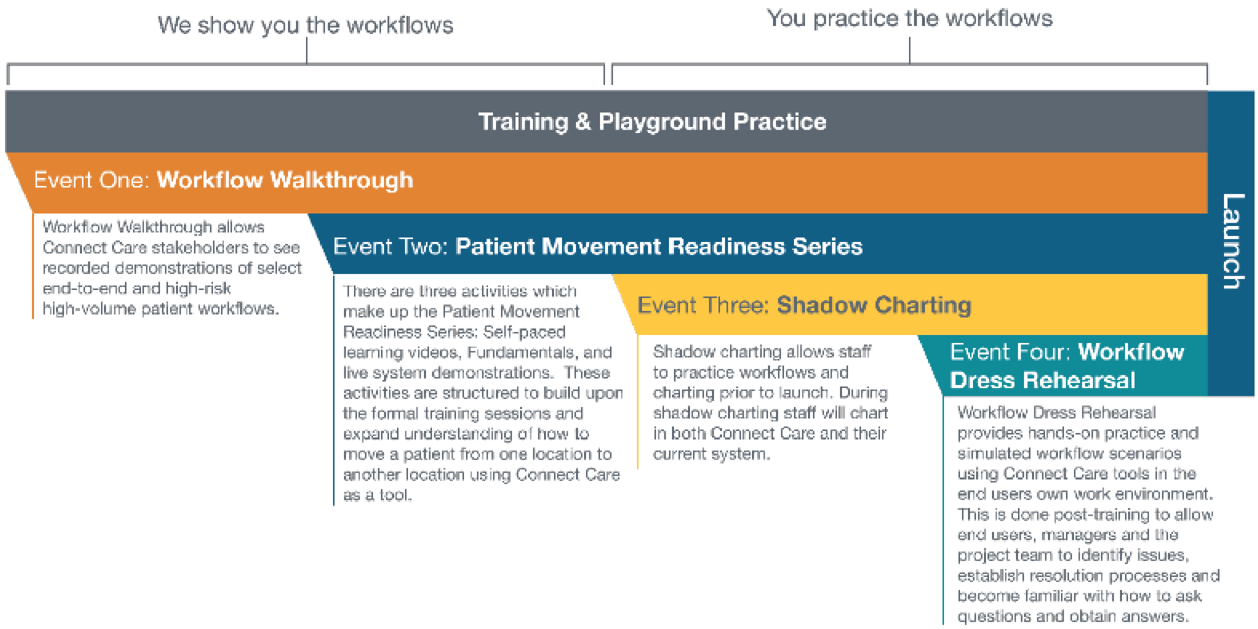
PRD - Production

- Primary working environment for clinical information system
- Refreshed: Persistent
- Interfaces: All upstream and downstream systems
- Users: All authorized Connect Care users
- Requirements: Basic Training, EUPA, Personalization
- Logons: Personal only

SUP - Support

- Nightly copy of PRD used by Support Team to troubleshoot problem reports
- Refreshed: Nightly from PRD
- Interfaces: None
- Users: IT
- Requirements: IT certification
- Logons: Personal accounts

Readiness Events Information for Physicians and Key Dates



Each Readiness Event builds on the knowledge from the previous session. The goal of all four events is to prepare end users and super users to be confident and successful during launch periods. They will explain both simple and complex workflows for providers, then teach users how to work within the new Connect Care environment helping users to be successful and confident in their work during launch periods.

For additional details on the Launch 9 Readiness Events: Insite - Launch 9 Readiness Events.

Workflow Walkthrough

Overview:

Workflow Walkthrough (WFWT) Demonstration Videos are available to help leaders, frontline (end user staff), managers and prescribers showcase the Connect Care system prior to training. The purpose of the are videos to give staff a sneak peek look into Connect Care and how it functions through the use of pre-recorded workflow videos. There are 20 different videos in total that focus on different urban and rural workflows that staff may use, as well as some of the most common care areas. The urban workflows apply to all sites within the large urban cities, while the rural workflows are intended for smaller rural sites included in each launch.

Managers are encouraged to share these videos with their teams prior to any Connect Care training, giving staff the opportunity to learn what to expect and the basics on how Connect Care works in different roles and care areas.

Videos can be accessed on Launch 9 Readiness Events | Insite (albertahealthservices.ca)

Key Dates	Event Goal(s)	Recommended Attendees
Videos accessible on Insite	• Participants will be able to picture workflows and how they will work in their environments.	• Zonal ACMIO team • MIL attendance is optional • Interested Medical Leaders and CMIO Prescriber End Users • Other CMIO/ACMIO leadership

Readiness Checkpoints

Overview:

Readiness Checkpoints are pre-Connect Care launch events intended to give launch operational leaders (zone, provincial programs and site leadership, as well as implementation teams, managers, directors, physicians leads) the tools they require to prepare their site and staff for Connect Care.

Event Details:

There are two different checkpoint events that are held before launch, these include:

1. **Capacity Management and Financial Readiness Summit (CMFR Summit)**
   The CMFR Summit will support and engage operational leaders from Professional Billing, Hospital Billing, Patient Access and Health Information Management as they prepare for their upcoming Connect Care launch. The event will focus on business, corporate and revenue cycle workflows that support change within those targeted and clinical areas where appropriate.
   Launches 4/5 CMFR Poster

2. **Clinical Operational Readiness Day (CORe Day):**
   The purpose of CORe Day is to provide an orientation to Connect Care Launch Incident Management Branch (CCLIMB), and examples of what a day in the life of launch looks like for multiple roles.

Each event is held through Zoom and it's an opportunity to ask questions.

Event	Key Dates	Recommended Attendees
Clinical Operations Readiness Day		• Zonal ACMIO team • Participation is optional for MILs, Medical leadership and CMIO Prescribers
Capacity Management and Financial Readiness Summit	Completed, March 14, 2024	• CMIO leadership as required

Patient Movement Readiness Series (PMRS)

Overview:

Patient movement are actions taken in Connect Care to electronically move a patient from one location to another. It is like moving the patient's "chart" with them when they move physically.

Some examples:

- emergency department to the inpatient unit
- inpatient unit to another site
- long term care to acute care
- inpatient unit to operating room

Event Details:

Practice Charting

Overview:

The Chief Medical Information Office (CMIO) has developed a Practice Charting plan for CMIO users (prescribers) who want to practice dual charting in Connect Care. CMIO Practice Charting does not replace Clinical Operations Shadow Charting; it targets prescribers who are unable to participate in or were out of scope for Shadow Charting, or who want additional practice.

Event Details:

- Medical leaders will identify clinical areas, sites and/or individuals that would benefit from CMIO Practice Charting, targeting prescriber areas/sites/individuals who were unable to attend readiness events, including Shadow Charting, are unsure of how to document, or are requesting extra practice.

- Note that Shadow Charting only targets High Risk/High Volume workflows and is not available in all clinical areas, so many prescribers will not have an opportunity to participate in Shadow Charting.
- The CMIO will coordinate with Medical Informatics Leads (MILs), Super Users (SUs) and the Training Team to schedule CMIO Practice Charting sessions. The ACMIO and CMIO Practice Charting team will ensure access is provisioned, that the technical requirements are in place and that the SUs are prepared.
- Clinic days with fewer appointments are ideal to allow sufficient time for the CMIO Practice Charting process.
- It is recommended that each participant dual charts on at least 2 to 3 patients for optimal benefit.

Event	Event Goal(s)	Recommended Attendees
TBD	• Increased End User confidence and launch readiness after they successfully log into the system and complete workflows using provided patient scenarios • Increased project team confidence and launch readiness after answering questions and resolving issues	• Zonal ACMIO • All Launch 9 MILs • Medical Leadership • All Launch 9 physicians are optional • Other CMIO/ACMIO leadership are optional

Workflow Dress Rehearsal (WDR)

Overview:

Workflow Dress Rehearsal is a multidisciplinary event that reviews common integrated workflows in a simulated Connect Care environment. WDR is designed to help prepare super users, educators and prescribers for Connect Care, while providing the tools to assist their peers with practice in the PLY environment.

Event Details:

- Frontline staff are encouraged to attend as virtual viewers to observe these workflows and increase their confidence for launch.
- Only certain workflows and care areas are focused on during WDR, these are determined by managers and implementation leads.

Event	Event Goal(s)	Recommended Attendees
TBD	• Increased End User confidence and launch readiness after they successfully log into the system and complete workflows using provided patient scenarios • Increased project team confidence and launch readiness after answering questions and resolving issues	• CMIO Super Users and Area Trainers who have capacity