

Connect Care Readiness Playbook Summary for Prescriber Leaders

Wave 4, Chapter 4: Engagement Readiness
June 14, 2021

Welcome to the Readiness Playbook Summary for Prescribers

Connect Care will be rolled out across the province over nine [Waves](#). The Readiness Playbook will guide Medical and other “Prescriber” Leaders in preparing for launch starting one year before launch. The CMIO office is responsible for training the following prescribers: physicians, nurse practitioners, clinical assistants, physician assistants, PhD scientists, dentists, fellows, residents, medical students and nurse practitioner students. 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 Wave’s stages of launching Connect Care. Tasks within the Playbook are organized as work packages which could have impact on Prescriber workflows and require Prescriber 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 Prescriber group which includes resources for coaching, change management, dealing with resistance and eHealth competency.

Awareness

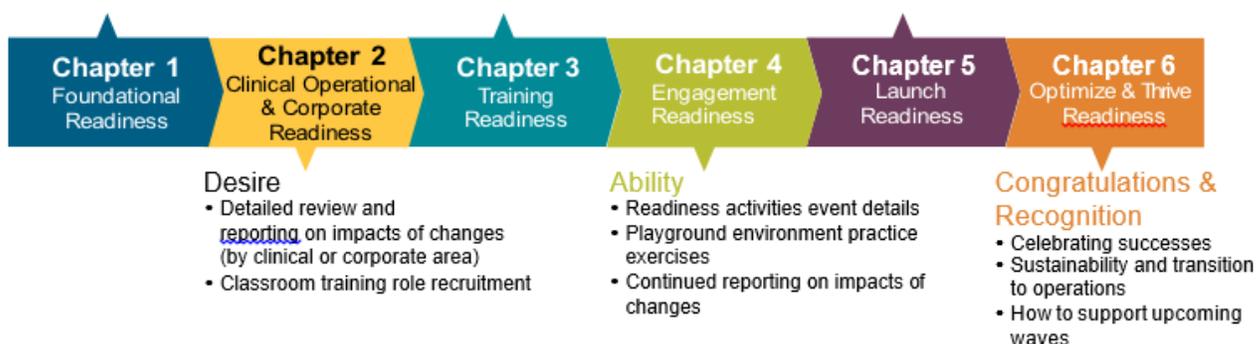
- Look ahead for the year
- Organizational changes and benefits
- Introduction to readiness reporting

Knowledge

- Detailed classroom training logistics
- Continued reporting on impacts of changes

Reinforcement

- What to expect at launch
- Support and escalation processes
- Activities to reinforce training



Information for Prescribers

COVID-19 Precautions in Connect Care Classrooms

Due to COVID-19 response, all Trainers and Learners need to complete the “[Daily Fit for Work Screening](#)” assessment each day before they come to class. Each center has a different door screening process at present.

All Trainers and Learners are currently continuously masking in all areas. There is a supply of hand sanitizer and masks available in each training room.



The learners are instructed to clean the high touch surfaces and equipment at their work station before and after class- keyboards, mouse, table top etc. Cleaning supplies are provided in each classroom.

eHealth Literacy

Prescribers are 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 Prescribers for Connect Care is by developing [eHealth](#) Literacy resources. These resources offer Prescribers 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](#)

Prescriber Principal Investigators

Research Integration

All Prescriber 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 Prescriber 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 Prescriber 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 cmio@ahs.ca.

In Basket

[In Basket](#) is Connect Care's secure, actionable and task-based communication toolkit that helps users manage their daily workflows. Prescribers use it to manage and action clinical tasks, and to communicate with colleagues and patients about tasks.

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. Prescribers who are off-service for prolonged periods can configure In Basket to send periodic email alerts about accruing tasks.

Communication



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 Prescribers until Connect Care becomes widely adopted throughout a zone.

- **Available Resources:** [Connect Care Prescriber Manual- In Basket](#)

Prescriber Training Program

Privacy Training

Prior to receiving access to Connect Care, Prescribers are required to take their [privacy](#) training and "[InfoCare: On Our Best Behaviors](#)" (OOBB) on [MyLearningLink](#).

Registration Process

Medical Affairs and the Associate Chief Medical Information Office (ACMIO) in each Zone (Calgary and Edmonton) have validated the Prescriber list for Wave 4 to ensure that these Prescribers are in the correct Wave and training track(s).

Wave 4 Prescribers 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. Those who do not register for training will be required to work with their Department Head to schedule training.

The ACMIO and Medical Affairs tracks registration numbers and updates will be provided to senior Leadership regularly.

eLearning Courses and Preperation

[MyLearningLink](#) is used to access Connect Care eLearning and supplemented courses featuring workflow demonstrations, specialty content and mobile that can be [searched](#) by specialty or need.

Connect Care Enviornements

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](#)". Some of the Connect Care environments are listed below.

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 clinical leaders to demonstrate functionality prior to the release of training environments (deprecated at training, do not use)
- Refreshed: weekly (Mondays)
- Interfaces: None
- Users: IT, CMIO Prescriber Leads, CKCM, AHS Analytics, Human Factors, HIM, HPSP, Trainers and Power Users
- Requirements: Epic Fundamentals Training
- Login: 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

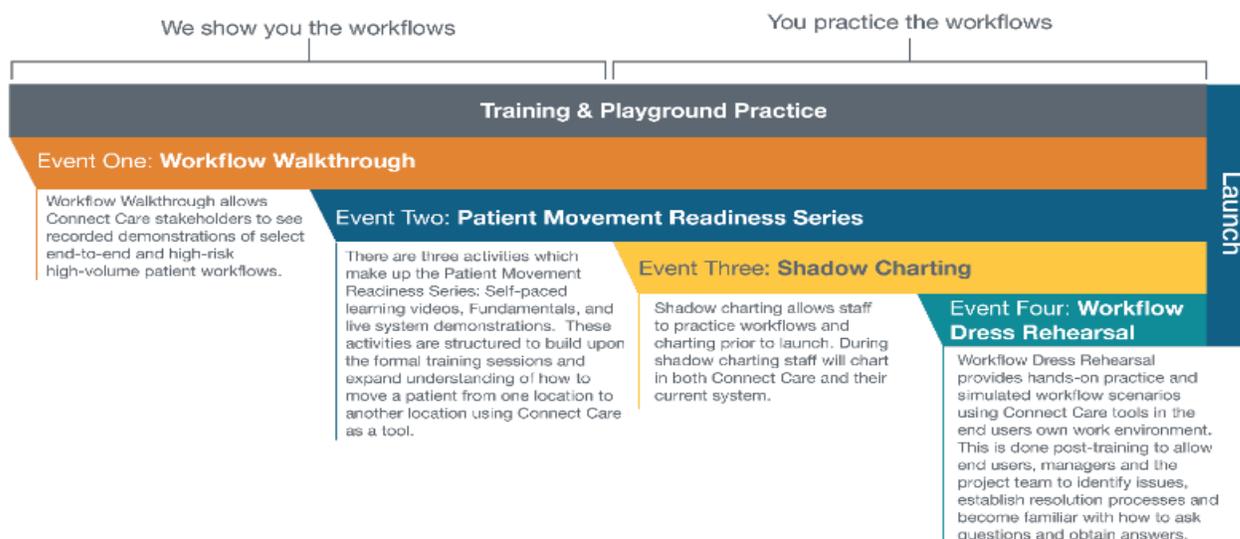
PLY - Learning

- 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

Readiness Events Information for Prescribers 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.



Workflow Walkthrough

(additional details: [Link](#))

Overview:

The Workflow Walkthrough (WFWT) event allows SMEs, operational Leaders and members of the program team to see demonstrations of select end-to-end and high risk/high volume patient workflows. This event is the first opportunity to showcase the completed foundation workflows and content; a chance to increase engagement and enthusiasm for the install prior to training.

Event Details:

- End-to-end Patient journey that is pre-recorded
- High Risk/High Volume facilitated workflow vignettes, followed by Q&A
- Interactive kiosks outside of the demonstrations (where possible)

Key Dates	Event Goal(s)	Recommended Attendees
Completed	<ul style="list-style-type: none"> • Participants will be able to picture workflows and how they will work in their environments. 	<ul style="list-style-type: none"> • Zonal ACMIO team • MIL attendance is optional • Interested Medical Leaders • Interested Prescriber End Users • Other CMIO/ACMIO Leadership

Readiness Checkpoints

Overview:

Readiness checkpoints aim to confirm operational understanding and ownership of milestones, expectations, metrics, risks and associated mitigation plans leading up to the launch.

Event Details:

- Prepares for launch; wave Leadership presents relevant issues, risks and action items from the Launch Readiness Assessments (LRAs) with CORE and CMFR operational Leaders.
- Clearly communicates accountability and responsibility for different components of launch success with CORE and CMFR operational Leaders.
- Creates a forum for Q&A with project, wave, and operational Leadership in advance of launch.
- Increases engagement and builds the confidence of operational Leaders who will support End Users at launch.

Event	Key Dates	Recommended Attendees
Clinical Operations Readiness Summit	September 15, 2021	<ul style="list-style-type: none"> • Zonal ACMIO team • Key MILs • Medical Leadership • Prescriber End Users not expected to participate • Other CMIO/ACMIO Leadership
Capacity Management and Financial Readiness Summit	September 16, 2021	<ul style="list-style-type: none"> • ACMIOs • CMIO Leadership and core team
Clinical Operations Readiness Day	October 13, 2021	<ul style="list-style-type: none"> • N/A



Patient Movement Readiness Series

(additional details: [Link](#))

Overview:

The patient Movement Readiness Series provides demonstrations and hands-on experience for both common and complex patient movement workflows. The sessions educate End Users and Leaders about how integrated patient movement workflows will change after Connect Care implementation. The events will help users understand how their patient movement handoffs affect other users' workflows in Epic.

Event Details:

- **Self-Paced Workflow Recordings**
- **Patient Movement Fundamentals Presentations**
- **Live Workflow Demonstrations** - Connect Care system demonstrations with multiple clinical and non-clinical roles to demonstrate the action/workflow for each user.

Event	Event Goal(s)	Recommended Attendees
September 27 - October 1, 2021	<ul style="list-style-type: none"> • Manage patient safety risks • Minimize launch confusion • Review cause and effect relationships • Establish clear ownership in the patient movement process • Help End Users learn to troubleshoot independently • Orient and educate End Users 	<ul style="list-style-type: none"> • Super Users and Area Trainers • MILs • Medical Leaders

Shadow Charting

(additional details: [Link](#))

Overview:

Shadow Charting will allow providers and prescribers, within certain care areas, to practice charting prior to a wave's launch date. During the Shadow Charting event staff practice charting in both their current documentation system and in Connect Care with real patient encounters in near real-time.

Event Details:

- End Users must sign up for the event to ensure Super User support is available to them
- Allows End Users the opportunity to use the Connect Care CIS prior to launch; allows Super Users the opportunity to practice at-the-elbow support prior to launch.
- The event is supported by Super Users.

Event	Event Goal(s)	Recommended Attendees
September 20 - October 29, 2021	<ul style="list-style-type: none"> • Increased End User confidence using charting within Connect Care • <u>Opportunity to practice in-system prior to launch</u> • Increased project team confidence and launch readiness after answering questions and resolving issues 	<ul style="list-style-type: none"> • Specialty-specific Wave 4 Prescribers and Leaders



Workflow Dress Rehearsal

(additional details: [Link](#))

Overview:

Workflow Dress Rehearsal prepares stakeholders for launch. After they have completed training, End Users will experience simulated workflow scenarios, and use the Connect Care CIS in their own physical area.

Event Details:

- Multiple End Users and roles can be involved and actively participate. End Users must sign up.
- End Users practice using the Connect Care CIS and complete simulated workflow scenarios in their own physical area after completing training and before launch.
- Project team can practice answering questions, issue tracking and issue resolution processes that will be used on the launch day.

Event	Event Goal(s)	Recommended Attendees
October 4 - October 29, 2021	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • All Wave 4 Prescribers and Leaders

Practice Charting

(additional details: [Link](#))

Overview:

The Chief Medical Information Office (CMIO) has developed a Practice Charting plan for prescribers who want to practice dual charting in Connect Care. CMIO Practice Charting does not replace 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.
- Clinic days with fewer appointments are ideal to allow sufficient time for the CMIO Practice Charting process.
- The event is supported by Super Users.

Event	Event Goal(s)	Recommended Attendees
TBD	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • Wave 4 Prescribers and Leaders who did not participate in Shadow Charting; unsure of how to document; or requesting extra practice

