PCC Roadmap and Product Roundtable

Paula VanDeventer

Kristen Ryan &

Team

User's Conference 2015

PCC Team Members

- **Kristen Ryan**
- **Lisa Legge**
- **Sarah Bunning**

- **Amanda Smith**
- **Tim Proctor**
- **Lisa Merrill**

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Goals of this session:

Build Connections:

- **Give you:**

    - **An understanding of how we prioritize, develop and deliver new features**

    - **An awareness of upcoming features and plans for the remainder of 2015**

- **Give us:**

    - **Feedback on specific, upcoming features**

    - **Feedback on your needs and priorities**

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Agenda

1. A quick review of what's been delivered since the 2014 User's Conference

2. An overview of our roadmap, development and delivery processes

3. A sneak peek into some upcoming features - to illustrate how the process works & get your feedback
   → Coffee Break! ←

4. What's coming in the 2nd Half of 2015 (and beyond)

5. What do YOU need? Top 20 Wishes, Brainstorming & Voting

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Terminology

First some terms you'll hear this morning:

1. User Story: a wish or need represented in a Who/What/Why template (Who needs what, and why).

2. Story Point: We do a rough-sizing of each user story to help us to plan what will fit on our Roadmap. A story point is a user story unit of measure (Tiny, Small, Medium, Big, Huge).

3. Roadmap: Our planning tool – it looks out about 6 months to identify high-level themes and specific features we expect to deliver.

Terminology (cont.)

More Agile terms...

4. **Agile Methodology: A project management approach that expects change, delivers functionality incrementally, and relies on teamwork, including collaboration with our clients**

5. **Delivery Team: A cross-functional team responsible for researching, defining, designing, developing, testing and delivering a feature**

6. **Theme: A group of related user stories, like ICD-10, Helping Providers Get Paid, ARRA, or Pediatric Delighters**

7. **Stakeholder: Anyone with a vested interest in a new feature**

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Since the 2014 UC...

We have delivered:

- 6 Releases

- 345 User Stories (516 Story Points), including:

    – 6 more ARRA2 Modules Certified (23/42)

    – 36 additional Financial Interfaces

    – 7 additional Clinical Interfaces (E-labs & Imms)

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Since the 2014 UC...

Looking at the user stories delivered by Theme:

- ARRA2 = 30% (153 story points)

- Client Wishes = 23% (119 sp)

- Supportability Improvements = 12% (63.5 sp)

- Reporting = 10% (50 sp)

- Clinical Interfaces = 8% (39.5 sp)

Since the 2014 UC...

Looking at the user stories delivered by Theme (cont.):

- **Financial Interfaces** = 7% (37.5 sp)

- **ICD-10** = 6% (32 sp)

- **pocketPCC** = 3% (14 sp)

- **OnePCC** = 1% (5 sp)

- **Performance Improvements** = .5% (3 sp)(Note: these are normally delivered as bug fixes and those are not represented here)

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Since the 2014 UC...

ARRA Deliverables include:

- ARRA-certified, HL7 2.5.1-compliant Immunization Functionality

    - Deceased Patient Functionality

    - Support for Middle Names, Suffixes

    - Patient's VFC Eligibility Status

    - Standardized Route & Site of Administration as well as VIS and Time of Administration

    - Vaccine Refusal Reason

    - Lot Manager with Expiration Dates

    - Disease with presumed Immunity

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Since the 2014 UC...

ARRA Deliverables include (cont):

- **Orders Functionality:**

  - **Ability to link SNOMED Procedures**

  - **Configure discrete (LOINC) test types**

  - **Contraindicated or Refused orders** (We snuck in configuring orders for confidentiality)

- **MyKidsChart Patient Portal:**

  - **Include Active Care Plans**

  - **Users can download the Patient Visit Summary**

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Since the 2014 UC...

ARRA Deliverables include (cont):

- **Amendment Requests – when the patient asks that you amend their health record**

- **Clinical Alerts functionality needed for Meaningful Use:**

  - **Logging of Alert changes**

  - **Addition of Diagnostic and Therapeutic Reference Resources**

- **Components to document Cognitive and Functional Status**

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Since the 2014 UC...

Client Wishes – a sampling:

- Spell Check (yes, we heard you!)

- A quick way to get back to the last patient

- Show upcoming appointments in the Portal

- Product-wide changes to ensure you know if a patient (or sibling) is deceased

- Configure orders to carry billing diagnosis codes to the EEF (along with procedure codes)

- Fix an immunization administered by accident

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Since the 2014 UC...

Client Wishes – a sampling (cont):

- Better handling of multi-page documents

- Ability to print scanned documents from the document import screen (feedback last year)

- Sticky sort order on document import screen

- Ability to individually configure "Other Health Information" on the Patient Visit Summary

- Ability to track two lot #s for a combo vaccine

- Enter patient weight in decimal pounds

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Since the 2014 UC...

Client Wishes – a sampling (cont):

- See who entered those patient vitals

- Minimum call window for Notify is now 2 hours

- Filter Phone Notes by Location (aka Care Center Support) also affected the Health Information Summary report, the Dashboard and MyKidsChart

- Immunization Forecasting

Since the 2014 UC...

Client Wishes – a sampling (cont):

- Let EHR users change their own passwords and strengthen password security

- Ability to customize which sections of the chart are displayed in MyKidsChart

- Remove Charted Visit Tool: Help to distinguish between visits for the same patient on the same date so I know which one to remove

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Since the 2014 UC...

Client Wishes – Help Providers Get Paid:

- **Electronic claims include procedure descriptions for non-specific CPT codes**

- **Partner ERA includes payer-provided adjustment identification information**

- **When autoposting, allow transaction date to be entered**

- **Identify obsolete/invalid CPT codes before submitting claims**

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Since the 2014 UC...

Client Wishes – Help Providers Get Paid (cont):

- Autopip – control whether CARC codes on the personal side drop the claim for manual posting

- Preptags/Tagsplit – catch missing REFNO value if Claim Delay Reason Code is used in Visit Status Screen

- Billing error report properly omits corrected/resubmitted claims

- oops: Provide a way to change procedure code modifiers

Since the 2014 UC…

Supportability Improvements:

- **This theme covers features that:**

    – **Help PCC Support to help You**

    – **Allow us to keep current on our infrastructure (database and other underlying applications)**

    – **Help you to help yourself – so you don't have to call Support as often**

Since the 2014 UC...

Supportability Improvements – a sampling:

- PCC Support can unlink E-lab results from a patient's chart

- PCC Support can view the raw HL7 Immunization Messages sent to registries

- PCC Support can move imported documents from one category to another

- Many updates/improvements to the backup process

- Even more activity logging to help PCC debug problems

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Since the 2014 UC...

Supportability Improvements – a sampling:

- **Updates to support newer client and Server Operating Systems (ongoing Mac, Windows, Ubuntu and CentOS updates)**

- **Improvements to our Release update deployment process**

- **EDI & MyKidsChart Infrastructure updates**

- **New Client Deployment Infrastructure**

- **Archive retired programs**

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Since the 2014 UC...

Reporting:

- **Tim and the team have delivered several new Dashboard reports:**

    - **No Show report, by month**

    - **HPV Benchmark**

    - **Show sick-to-well by Provider**

    - **Clinical Pulse includes Imms measures**

    - **Overdue for imms includes quadrivalent**

    - **Revised Coding Expertise trend graphs**

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Since the 2014 UC…

Reporting:

- **Our Reporting Solution:**

  - After speaking with many Reporting solution vendors in 2H2014, we chose one to partner with

  - We established Reporting infrastructure including a Data Warehouse containing data from both Partner and the EHR

  - We began developing reports

  - We began planning for our pilot

Since the 2014 UC...

Reporting:

- **Our Reporting Solution (cont):**

    - **And along the way we became disenchanted with the vendor's solution architecture and support**

    - **We have temporarily halted this project, but we will return to it upon completion of the ARRA certification**

Since the 2014 UC...

Clinical Interfaces delivered, among others:

- Lab Results:
    - HealthBridge
    - Central Coast Pathology
    - Palmetto
- Immunization Registry Interfaces:
    - Georgia   - New Jersey
    - California   - New Mexico

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Since the 2014 UC...

Financial Interfaces delivered, among others:

- BCBS: NC, WY, CA, TN, SC, VT

- Medicaid: GA, VA, MO, OH, IN, NH, CO, VT

- Others:

  - Providence Health   - Molina

  - Emdeon   - Centene

  - Amerigroup   -Passport Health

  - Meridian   - Healthy Kids

  - Minnesota Health Partners

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Since the 2014 UC...

ICD-10 ... and here we go AGAIN!

- Workshops, Weblabs, UC Sessions

- Partner is done...

- EHR is ready...

- Dashboard is ready... and so is the UC server!

- End-to-End testing with Payers is happening

- A Simulation Environment is rolling out

- Prepare to Migrate!!

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Since the 2014 UC...

pocketPCC:

- **Will be replacing PocketPartner**

- **Pilot deploys in September**

- **Ability to see any Provider's Schedule**

- **Mobile EHR that works on all newer Smart Phone browsers**

- **Ability to create Phone Notes with tasks!**

OnePCC:

- **This theme is just beginning... but it will be big**

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Since the 2014 UC...

Performance Improvements:

- Improved efficiency of connections with DrFirst (ePrescribing)

- Optimized queries

- Sped up task queue refreshes

- Built better DB indexes to speed searches

- Reorganized Partner's file structure

- Incremental improvements delivered through smarter code

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How we deliver new features

To build our Roadmap, we gather information from:

- Clients

- Potential Clients

- PCC Staff

- Observation of the Industry

- Mandates

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How we deliver new features

The Roadmap consists of:

- Our Goals:

  - Build Connections

  - Help Providers to Get Paid

  - Work/Life Balance

- Releases – scheduled every 6-8 weeks

- Themes – related user stories

- Individual user stories planned for delivery

- A disclaimer – stating that the information will change

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How we deliver new features

Themes and user stories are assigned to Delivery Teams:

- **Each Delivery Team includes at a minimum:**

    - **A Business Analyst (researches requirements)**

    - **A Designer (designs the solution)**

    - **A Developer (builds the solution)**

- **This team works together to understand the need and devise a solution that will work well for the majority of practices**

- **Delivery Teams often include Adjunct Members – Subject Matter Experts in Interfaces, Billing, etc.**

How we deliver new features

Delivery Teams work each User Story through Milestones:

- **Scope Checkpoint (present what they will build)**

- **Design Checkpoint (show what it will look like)**

- **Delivery Team Testing**

- **Playback to Key Stakeholders (early demo - how it works)**

- **Playback to Full Stakeholders (live demo of their solution)**

- **Solicit feedback, determine final changes**

- **Consider the impact of delivering the feature (Migration & Implementation Considerations)**

How we deliver new features

As User Stories are completed, they become part of a Release:

- Code Freeze #1 = the cutoff date for new features

- Code Freeze #2 = the cutoff date for bug fixes (+1 week)

- Testing of the Release takes 6 weeks:

    - Unit Testing by Developers

    - Functional Testing by Design

    - Alpha Testing by all of PCC (1 week)

    - Performance Testing by PCC

    - Beta Testing – by YOU!

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How we deliver new features

Deploying a Release takes a team of folks:

- Douglas creates release documentation and videos

- Marketing communicates what's coming, and when

- Our Support Teams provide weblabs

- Our Developers push the release out to your servers

- Our Technical Support and SysAdmin teams help to ensure everything happens as it should

- Many of us monitor the updates, logging in to check things out on your systems, and we get feedback from you

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How we deliver new features

Every Release finishes with two events:

- **A Retrospective Review:**

  - **What went well?**

  - **What could we have done better?**

- **A Release Celebration**

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Playbacks and Design Checkpoints

And now, we'd like you to experience our Delivery Team Process!

We're going to show you:

- Features that are in development for future delivery

- Live playbacks – sneak previews for you

- Design Checkpoints – what's heading into development

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Playbacks and Design Checkpoints

- **Disclaimer: The features we will play back have not even gone through Unit Testing yet! There may be a surprise lurking...**

- **Kristen Ryan has 2-3 User Stories we will share with you, depending on time**

- **We'll ask for your questions and feedback at the end of each user story presentation**

- **This should give you a feel for the checkpoints and playbacks in our Agile development process**

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Coffee Break!

- **Thank you for your attention and your participating in our Delivery Team process!**

- **We will take a 15-minute break at 10:00**

- **Please come back at 10:15 and we will:**

  - **Take a look at what's on the Roadmap for the rest of 2015**

  - **Begin the final hour of this session: Brainstorming your ideas and voting on your favorites!**

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What's Coming – and When?

- Now you've seen first-hand a couple of the upcoming features

- Let's talk about what else is coming in the 2nd Half of 2015 (and beyond)

- We expect to continue delivering about 6-7 releases each year...

- ...With a continued focus on Interfaces (Clinical & Financial), Interoperability, and increasing focus on the exchange of clinical records and messages

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What's Coming – and When?

- **Coming to you in Release 6.29:**

  - **Some final ICD-10 features, like configuring ICD-10 codes for your Orders in the EHR**

  - **Many more ARRA user stories (Direct exchange and C-CDA)**

  - **Dashboard: Development Screening Rate Benchmarks & ICD-10 Updates**

  - **The pocketPCC Pilot!**

  - **oops Features!!**

  - **Delivery scheduled for September 13th**

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What's Coming – and When?

- **Coming to you in Release 7.0:**

  - **Our ARRA 2014-edition Certified Release!**

- **Delivery scheduled at the end of September 2015 … wait, what?! Yes, September 27th!**

- **This release is for PCC EHR clients who wish to attest to Meaningful Use in 2015**

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What's Coming – and When?

- **You saw at the beginning of this presentation that we delivered 345 User Stories comprising 516 Story Points since the 2014 UC**

- **Our two September releases account for 105 User Stories and 250 Story Points!**

- **We have a LOT of work ahead of us for our September deliverables**

What's Coming – and When?

- **Themes and Projects for 2H2015:**

    - **ICD-10 Cleanup**

    - **OnePCC – Single Sign-on to all tools**

    - **Reporting**

    - **pocketPCC   replacing PocketPartner**

    - **Forms support in MyKidsChart**

    - **Getting Paid**

    - **EDI Clinical & Financial Interfaces**

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What's Coming – and When?

- **Infrastructure updates**

- **What else?**

  - **The Appointment Book?**

  - **Pediatric Delighters? (BP nomograms, Immunization Inventory, Growth Charts, Referral Tracking ...)**

  - **Performance Improvements?**

  - **ePrescribing Integration?**

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What do YOU need?

Now we're going to drill down a little deeper:

- **Review "Top 20 Wishes"**

- **Brainstorm additional ideas**

- **VOTE!**

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What do YOU need?

The Top 20 Wishes:

- **You have a list of the most popular wishes, by product, for:**

  - **PCC EHR**   **- Partner**

  - **Dashboard**   **-MyKidsChart**

- **We already know about these – what we don't know is how you would prioritize them**

- **Quick review & your feedback**

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What do YOU need?

Brainstorming & Voting:

- We'll use the next 20 minutes to solicit your ideas

- We'll use our final ½ hour to give you a chance to vote for your favorite ideas, and to discuss other ideas with the friendly PCC Delivery Team member waiting at each focus area

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What do YOU need?

We'll take 5 minutes per topic to ask for your ideas on each of 4 topic areas. What features do you need?

- Patient Portal – MyKidsChart.com

- Clinical Functionality – charting visits, seeing patients

- Practice Management – how can we help you to manage your Practice?

- Reporting/Dashboard – turning data in your system into information that can help you

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Wrap up before Voting

- **Thank you all for attending and participating!**

- **Please fill out your surveys before heading out for lunch**

- **You should each have a sheet of sticky dots – please take them to the topic area of your interest and spend your dots to let us know what's most important to you**

- **Feel free to identify additional needs in discussions at the topic stations**

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Wrap up before Voting

One Final Request:

If one of these areas is so near and dear to your heart that you'd like to join a Steering Committee for that topic, please let us know at the topic station

Do you want to be involved in early testing of the new Reporting Solution? Help define the roadmap for pocketPCC? This is a great time to let us know!

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THANK YOU!

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