

Quarterly Interim U-TAC Project Status

CHARMS

Executive Sponsor: Lori Mitchell, CFO-Harborview Medical Center

Project Director, Patrick Dolan

July – September 2009

Description

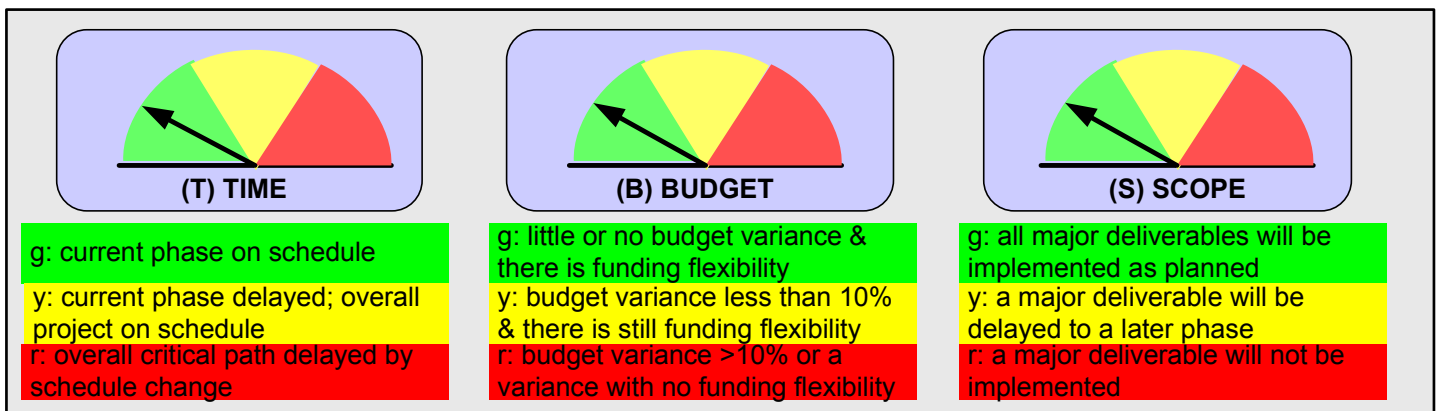
The Clinic and Hospital Access and Revenue Management System (CHARMS) project involves implementation of the Resolute Hospital Billing and Admission/Discharge/Transfer (ADT) modules from Epic Systems Corporation (Epic). For over ten years, entities within UW Medicine (UW Physicians - UWP and UW Physician's Network - UWPN) have been installing and using Epic software for scheduling, professional billing, registration, reporting and electronic medical records. Therefore, the existing Epic network, hardware, support team and interface infrastructure at UW Medicine will be used for this project.

A 35-year-old ADT and hospital billing (PFS) system currently supports UW Medicine. These systems have reached the point where they experience frequent operational issues, are at risk for more serious outages and lack required functionality. They cannot be enhanced to satisfactorily address these issues and replacing them has been determined to be the best solution. The hospital billing project is a key element of the UW Medicine IT Strategic Plan, which calls for the entire revenue cycle, from admissions and outpatient registration through the collection of payments from insurers and patients, to operate efficiently, effectively, accurately and in a compliant manner.

Progress and Status Summary

Per the below summary (as of early August) the project has launched four months of enterprise integration testing after successfully concluding two rounds of unit testing. Good progress is being made on finalizing the integrated unit testing of the more than fifty interfaces the project will replace. The first group of interfaces (for systems that produce charges) were included in the September round of integration testing, and the latter will be included in the October.

Curricula for over 20 in-class and twelve e-Learning modules is now complete. The training team is in the midst of pilot training of these modules in preparation for super user training in late October. Cutover planning is progressing well, culminated in a cutover sequencing workshop held in late September.



Risks / Issues

Item	Next Steps / Action Required
(T) Report development behind schedule	<ul style="list-style-type: none"> Assigned project manager to assist with resource scheduling and tracking. Convening weekly meetings of key stakeholders to validate report content.
(T) Stakeholder department resource availability	<ul style="list-style-type: none"> Hospitals are supplementing Finance/Accounting staff resources to enable participation in CHARMS.

Accomplishments

Current Reporting Period Accomplishments

- Completed unit testing where more than 500 scripts were each run twice.
- Completed class materials for end user training and conducted credentialed trainer cross-education.
- Completed “intra-Epic” workflow integration testing, and launched enterprise integration testing.
- Completed integrated unit testing and transaction validation testing on ADT and charge interfaces for all charge-generating applications (13 systems).
- Developed over ninety workflow scenarios to leverage in enterprise integration testing.
- Finalized approaches to loading inhouse patient data and charges for system cutover/activation.
- Finalized cutover “go/no go” criteria with executive sponsors.

Upcoming Reporting Period Planned Accomplishments

- Complete four rounds of integration testing.
- Conduct focused testing events for: charge capture, financial reporting, ED/FirstNet integration, system security validation.
- Conduct first test of cutover processes/programs.
- Complete super user training.
- Conduct workflow walkthroughs/demonstrations for end users at all sites.
- Conduct first workflow/technical readiness assessment at 120 days pre-activation.

Schedule – 73% Completed

ID	Upcoming Critical Path Activities	Start	Finish	% Complete	Q2 09		Q3 09			Q4 09			Q1 10					
					May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr		
1	Application Unit Testing (Round 1 and 2)	6/1/2009	7/31/2009	100%														
2	Integration Test Scenario Development	7/6/2009	8/31/2009	100%														
3	Charge Capture and Reconciliation	6/1/2009	8/1/2009	95%														
4	Interface Development Group 1	5/1/2009	7/15/2009	100%														
5	Interface Development Group 2	5/1/2009	8/1/2009	100%														
6	Peer System Readiness for testing (Group 1)	5/22/2009	7/15/2009	100%														
7	Peer System Readiness for testing (Group 2)	5/1/2009	8/1/2009	95%														
8	Interface Testing with Peer Systems	7/15/2009	10/1/2009	40%														
9	Enterprise Integration Testing	9/8/2009	12/31/2009	0%														
10	Workflow Walkthrough 1 and 2	9/21/2009	10/30/2009	0%														
11	Change Management	7/1/2009	2/15/2010	30%														
12	Training Development	6/1/2009	1/1/2010	50%														
13	Report Development	7/6/2009	12/30/2009	1%														
14	Stakeholder Testing Event	12/1/2009	12/31/2009	0%														
15	Focus Test Planning	7/15/2009	12/30/2009	30%														
16	Focus Testing Charges	9/1/2009	9/30/2009	0%														
17	Focus Testing ED (Cerner FirstNet)	10/1/2009	10/31/2009	0%														
18	Focus Testing Financial Reporting/GL	11/1/2009	11/30/2009	0%														
19	Cutover and Activation Planning	6/1/2009	2/15/2010	30%														
20	Training delivery	10/1/2009	2/28/2010	0%														
21	Dress Rehearsal	1/15/2010	2/15/2010	0%														
22	Go/No-Go Decision	2/1/2010	2/15/2010	0%														
23	Go Live	3/1/2010	3/1/2010	0%														

Summary of Major Milestones (including revisions)

Schedule Summary	Target Date	Status
Complete unit testing	July 2009	Completed July 2009
Finalize development of required interfaces	Sept 2009	In Process
Complete end user training materials	Sept 2009	Completed Sept 2009
Complete integration testing scenarios/launch integration testing	Sept 2009	Completed Sept 2009
Complete integration testing and focused testing	Dec 2009	In Process
Conduct cutover dress rehearsal	Feb 2010	In Process

Summary of Major Milestones (including revisions)		
Conduct 120/80/40 day pre-live assessments	Feb 2010	In Process
Activation / go live	Mar 2010	Not Started

Budget

	Estimate	Actual Expended to Date	Current Balance	Current Percent Expended
Combined budget	\$ 53M	\$ 16.2M	\$32 M	31%

* Estimate History	Amount	Reason for Change
Original Estimate	\$ 53M	No revisions – lower rate of spending prompted limited request for IT capital in FY 2010
Estimate – revised mm/yy	\$	
Estimate – revised mm/yy	\$	