

Organizational Considerations When Staff Terminate

May 25, 2012

Embrace the new world of healthcare

- Presenters

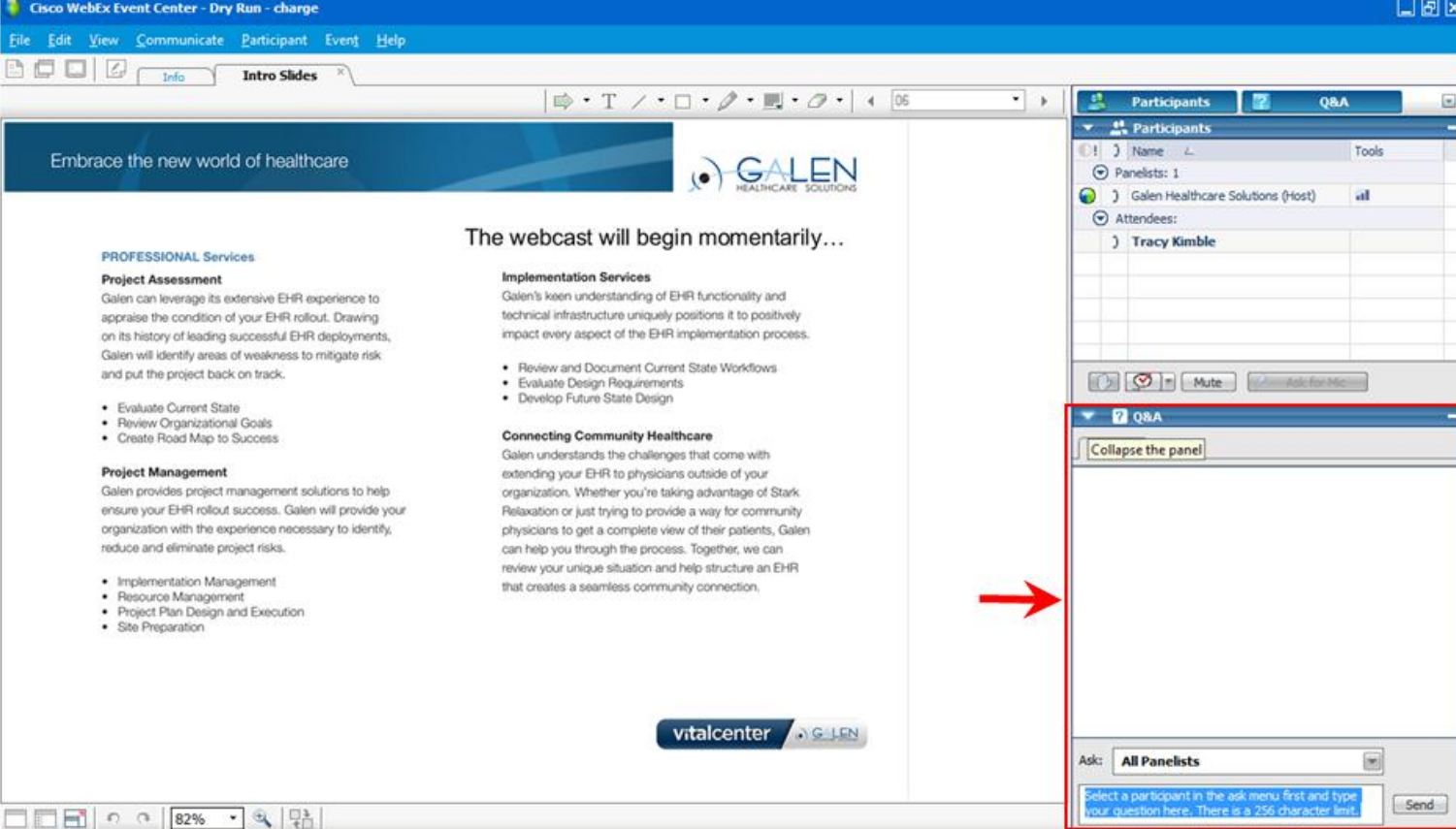
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Your phone has been automatically muted. Please use the Q&A panel to ask questions during the presentation!



The screenshot shows a Cisco WebEx Event Center window titled "Cisco WebEx Event Center - Dry Run - charge". The main presentation area displays a slide with the title "Embrace the new world of healthcare" and the Galen Healthcare Solutions logo. The slide content is divided into three sections: "PROFESSIONAL Services", "Implementation Services", and "Connecting Community Healthcare".

PROFESSIONAL Services

- Project Assessment**
Galen can leverage its extensive EHR experience to appraise the condition of your EHR rollout. Drawing on its history of leading successful EHR deployments, Galen will identify areas of weakness to mitigate risk and put the project back on track.
- Project Management**
Galen provides project management solutions to help ensure your EHR rollout success. Galen will provide your organization with the experience necessary to identify, reduce and eliminate project risks.

Implementation Services

Galen's keen understanding of EHR functionality and technical infrastructure uniquely positions it to positively impact every aspect of the EHR implementation process.

- Review and Document Current State Workflows
- Evaluate Design Requirements
- Develop Future State Design

Connecting Community Healthcare

Galen understands the challenges that come with extending your EHR to physicians outside of your organization. Whether you're taking advantage of Stark Relaxation or just trying to provide a way for community physicians to get a complete view of their patients, Galen can help you through the process. Together, we can review your unique situation and help structure an EHR that creates a seamless community connection.

The bottom of the slide features the "vitalcenter" and "GALEN" logos.

On the right side of the window, there is a "Participants" panel and a "Q&A" panel. The "Q&A" panel is highlighted with a red border and a red arrow pointing to it. It contains a "Collapse the panel" button, a dropdown menu set to "All Panelists", a text input field with placeholder text "Select a participant in the ask menu first and type your question here. There is a 256 character limit.", and a "Send" button.

Overview

- Developing Process & Procedures
- Workflow for provider deactivation
- Workflow for user deactivation
- Question and Answer



Develop a Security Team

The first step in determining a policy for managing terminated staff is to develop a Security Team to ensure all aspects of deactivation occur in the organization.

The key players in this team may include:

- Interface analyst
- Enterprise EHR analyst
- Network/System analyst
- HR Representative
- Clinical Informatics team member
- Practice Management System analyst

Developing Process and Procedures

Organizations should develop procedures for:

- Who will monitor the terminated user or provider's worklist and task view
- Expectancies for how long the terminated user or provider's task view and worklist will be active.
- Turnaround time for list cleanup
- When a provider will be deactivated in dictation systems
- When a user or provider will be deactivated in the EHR

Developing Process and Procedures

Organizations should develop procedures for:

- If staff will be removed from the Employee Patient Security Group
- Provider Deactivation Form and User Deactivation Form
- Submitting the Deactivation Forms
- Tracking the date when providers can be inactivated in the system after their termination date.

Notification Process for Terminated Users or Providers

Options for notifying an internal resource that a user or provider is terminated:

- HR department notifies IT staff of user termination.
- IT staff emails manager reminder to complete the deactivation form.
- Manager fills out a deactivation form and sends it to the EHR Application Team.

Terminated Provider Form Content

The form should include the following information:

- Legal Name of provider
- Termination Date
- Who will be reviewing and reassigning this provider's tasks?
- Who will be completing this provider's worklist items?
- Have all charges been submitted and processed for this provider?
- Has an end date been added to this provider's schedules?

Terminated User Form Content

The form should include the following information:

- Legal Name of user
- Termination Date
- Who will be reviewing and reassigning this user's tasks?

EHR Application Team Reviews Form

EHR Application Team reviews the deactivation form to make sure all required information is provided. If the form is not complete, it is sent back to the department/site to collect the missing data.

Deactivating Providers

Process for Deactivating Provider

1. Identify and confirm the provider to be deactivated.
2. Ensure the provider has left and did not just transfer to another site within the organization.
3. Put an indicator in front of the provider's last name (zz or xx for example) so manual tasks aren't sent to this provider.
 - In later versions of 11.2, the "Prohibit Task Assignment" checkbox can be selected in TWAdmin to prevent manual tasks from being sent to the provider.
4. Create/update task views for the provider. Task views should be built by site.
 - Create a site task view for the deactivated providers (SITECODE Deactivated Providers). Add Status filters of Active and In Progress.
 - Add the provider to the site's Deactivated Providers task view by using the Assigned To filter.

Process for Deactivating Providers

5. Assign the task view to the person listed as being in charge of working/reassigning the provider's tasks from the deactivation form.
6. Remove the provider from any coverage views where he/she is included.
7. Email the assigned person with the task view information along with the procedure detailing the expectations, turnaround time, etc.

Process for Deactivating Providers

8. Create/update worklist views for the provider.
9. Create a site worklist view listing the provider as the Ordering Provider and Authorizing Provider (SITECODE Deactivated Providers).
10. Update the Order Status.
11. Assign the worklist to the person listed as being in charge of completing the Provider's worklist items.
12. Email the assigned person with the worklist view information along with the procedure detailing the expectations, turnaround time, etc.

Task and Worklist Demo

Process for Deactivating Providers

13. Update the PM System.

- Confirm all charges have been submitted for this provider.
- Confirm an end date has been added to the provider's schedule and remove them from any scheduling departments they are linked to when possible.
- If a deactivation date option is available, enter a date in the future as determined by the organization.

14. Update SureScripts.

- Unregister the provider so no new RX Renew Requests will come in to the provider's task list.

15. Update letterhead.

- If a provider is listed in the letterhead for a site, remove the provider's name.

Process for Deactivating Providers

After an organization-designated period of time:

1. Deactivate the provider in the dictation system (if needed).
2. Delete the provider from the results interface translation table.
3. Validate the task list and worklist views are clear. Remove the provider's name from the Assigned To field in the task view.
4. Remove the provider's name from the ordering, authorizing and supervising provider site's deactivated providers worklist view.
5. Inactivate the provider in the EHR under TWUserAdmin.

Deactivating Users

Workflow for User Deactivation

1. Identify and confirm the user to be deactivated.
2. Ensure the user has left and did not just transfer to another site within the organization.
3. Update task views for the user.
4. If the user had unique task views assigned to them, assign the task view to the person listed as being in charge of reviewing and assigning the user's tasks from the deactivation form.
5. Remove the user from any coverage views where he/she is included.

Workflow for User Deactivation

6. Email the assigned person with the task view information along with the procedure detailing the expectations, turnaround time, etc.
7. Update worklist views for the user.
8. If the user had worklist views assigned only to them, assign the worklists to the person listed as being in charge of completing the user's worklist items.
9. Email the assigned person with the worklist information along with the procedure detailing the expectations, turnaround time, etc.

Workflow for User Deactivation

10. Deactivate user in the EHR.
11. Inactivate user in Scan (if needed).
12. After the organization-designated time frame, validate the task views are clear. Delete/inactivate the task views as needed.



QUESTIONS?

http://wiki.galenhealthcare.com/Organizational_Considerations_when_Staff_Terminate