Agenda

- PennChart Phase II
- PennChart Research
- Operational Impacts
  - Scheduling/Registration Workflows
  - Clinical Workflow Workflows
  - Billing Workflows
- Upcoming Activities
PennChart II: At a Glance

**PennChart II Applications**

- Inpatient Clinical: CPOE, Clinical Doc, CDS, Rx, OB
- Revenue Cycle: ADT, Hospital Billing, HIM
- HomeCare/Hospice

**PennChart II Go-Live Dates**

- 10/22/16: PAH and CCH
- 3/4/17: HUP, PPMC, Rittenhouse, HomeCare/Hospice

Calendar Year

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**Phase I Go-Lives**

- System Design

**System Build and Clinical Content Build**

**Testing**

**Training**

**Phase II Go-Lives**

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PennChart II: At a Glance
PennChart Research

- **Core Research Functionality**
  - Creating and Managing Research Study Records
  - Study-Patient Associations
  - Encounter Linking
  - Billing Review

- **Significant changes coming with PennChart Phase II**
  - Sun-setting of SMS and SCM
  - Streamlined workflows for billing and registration
  - Full integration across 4 hospitals- HUP, PPMC, PAH, CCH

- **PennChart Research Team**
  - Jessica Chen – IS Lead
  - Maha Dutt – Ops Lead
  - Lori Conley – Principle Educator/Analyst
  - Marisa Cinousis – Credentialed Educator
  - Alicia Fenerty – Credentialed Educator
Scheduling/Registration Workflows

♦ **What’s Staying**
  - Appointment scheduling and admissions within PennChart
  - Study creation workflows
    - Future changes with Velos implementation
  - Linking Encounters within Specialty Billing Folder
    - New checkbox location went live with 2015 Upgrade

♦ **What’s Changing or New**
  - Research Guarantor not used at scheduling
    - Guarantor will be created with Research study record creation and used to post charges
  - Encounters with both research and non-research related activities to be scheduled as one visit
Clinical Workflows

❖ What’s Staying
  • Ambulatory clinical documentation within PennChart
  • Study-Patient association workflows
    – Future changes with Velos implementation

❖ What’s Changing or New
  • Order association discretely linked to study
    – Not using research guarantor or order questions
    – Research association similar to diagnosis association
  • Inpatient clinical documentation now within PennChart
    – Inpatient studies will need to be built within PennChart if utilizing Penn services and/or other billing or clinical requirements
Billing Workflows

✧ What’s Staying
  • Clinical care billing workqueues remain
  • Professional billing continues with PennChart

✧ What’s Changing or New
  • Technical/hospital billing within PennChart
  • Research Billing Review
    – Single review of all charges for research patients
    – Report based view not workqueue based
  • 100% review of all charges for research patients
    – All charges, research-related or not will be held for review until research review complete
  • Reporting and Dashboards for billing within PennChart
Upcoming Activities

❖ Education
   • PAH/CCH go-live end user education COMPLETE
   • HUP/PPMC/Rittenhouse Sq/ Hospice training to start on January 03rd 2017
     – eLearnings assigned on Knowledgelink
     – In classroom course schedule posted to Knowledgelink
     – Do not self assign- trainings will be assigned to all users!

❖ Go-Live Activations
   • PAH/CCH activation October 22, 2016- COMPLETED SUCCESSFULLY!
   • HUP/PPMC Go-Live date March 4, 2017
   • http://uphsxnet.uphs.upenn.edu/is/pennchart/

❖ Continued System Updates and Maintenance
   • Notice of Privacy Practices (NPP) Update
     – Research Recruitment Opt-Out
     – HIE opt-Out
   • New practice locations
Recruitment Resources via EMR at Penn

Penn Recruitment:
- Best Practice Advisory

Data Analytics Center:
- Penn Data Store
- Penn Seek
- Cohort Explorer
- Pennomics
- MyPennMedicine

!! MUST HAVE IRB APPROVAL!!
!! SEEK ADVISE FROM OCR AT PLANNING STAGES!!

Data Analytics Center- Recruitment via EMR

http://www.med.upenn.edu/dac/
VELOS-Clinical Trial Management System

- What is a CTMS?

- PennCTMS

- Operational Impacts
  - Study Setup Workflows
  - Patient Enrollment Workflows
  - Adverse Event Workflows
  - Calendar Workflows
  - Forms Workflows
What is a CTMS?

- **Improved transparency of a study**
  - Study teams can all view the status of a study and patients in one place
  - It will be easier to find out how many studies a patient is actively enrolled on
  - Service centers will be able to see what studies may be requesting their services (and what the status of the study actually is)

- **Patient care will be improved**
  - By integrating with EPIC, clinicians will be able to see that their patients are participating in clinical research
PennCTMS Phase 1

What is the PennCTMS Phase 1 implementation?
• 100% of clinical trials tracked in Velos
• 100% of clinical trial patients (all statuses) tracked in Velos
  – Including Adverse event reporting
  – Multi center trials may be excluded
• 100% of all new studies’ eCRFs built by a central team

PennCTMS Modules
• Study Management
• Patient Management

PennCTMS Integrations with Other Systems
• Single sign-on with the PMACS Active Directory
• Receiving Patient demographic data from EPIC
  – E.g. First Name, Last Name, MRN, Gender, Birthdate, Address
• Sending Study Records to EPIC
• Exchanging patients’ statuses on studies with EPIC