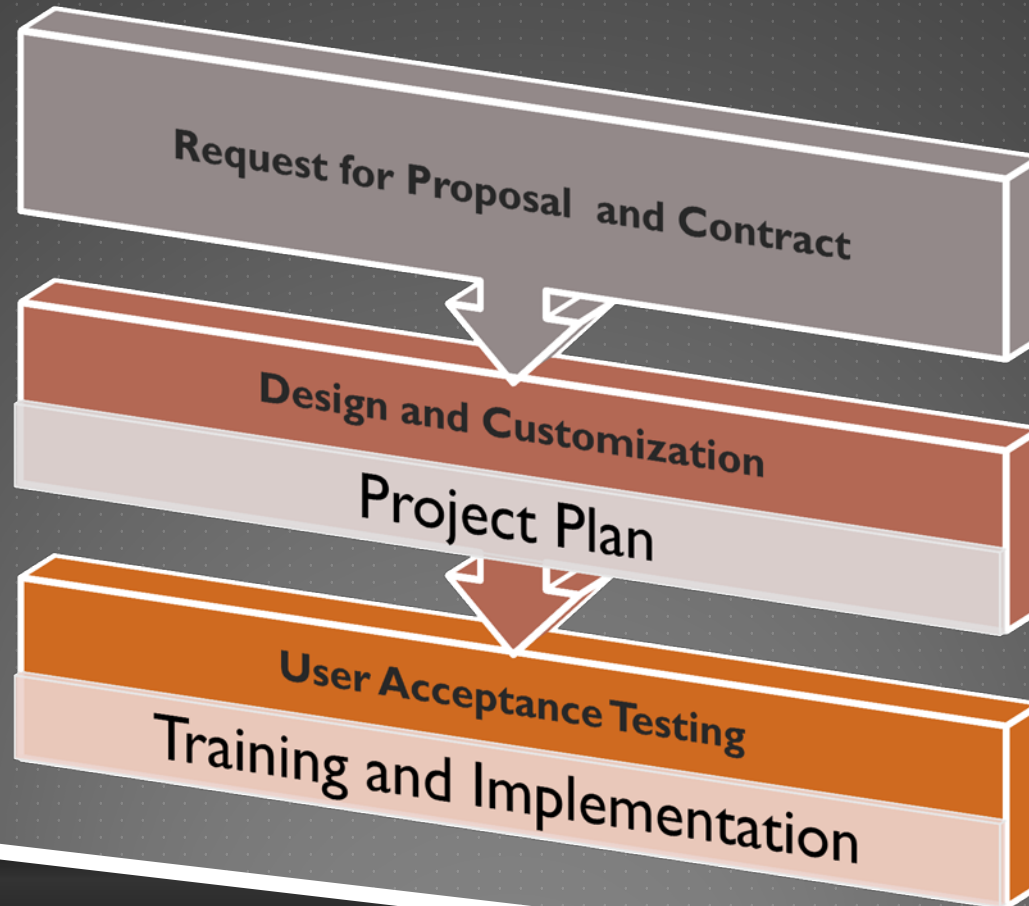# TRANSITION WITH SUCCESS

Jennifer Baker,

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Idaho Immunization Program

THE KEYS TO SUCCESS

- Request for Proposal (RFP)/Contract Process
- Design and Customization
- Project Plan
- User Acceptance Testing (UAT)
- Training
- Implementation

- Looking to the Future
- Lessons Learned

PROJECT FLOW

REQUEST FOR PROPOSAL AND CONTRACT PROCESS

▶ Make the RFP clear, concise and *SPECIFIC* to your needs

▶ Involve the contract department and any Information Technology team

▶ Make sure stakeholders (VFC, WIC or Epidemiology staff and/or medical providers) have an opportunity to have a representative involved

▶ Have specific questions in mind for each vendor

▶ Have vendor demonstrate product

▶ Ask vendor to have a project manager, business analyst, and developer weigh in on the contract deliverables

DESIGN AND CUSTOMIZATION

- ▶ Engage stakeholders to identify needs and wants for normal business practices
- ▶ Make sure all customizations are prioritized
- ▶ Be thorough and timely during the "Functional Design Documents" (FDD) phase
- ▶ Consider rolling out additional modules at a later time
- ▶ Make sure stakeholders are aware of customization priorities and future releases

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PROJECT PLAN

- Make sure plan is drafted with reasonable expectations from both the project and the vendor

- Make sure FDDs outline the functionality required and the processes each FDD affects

- Make sure subsequent releases have enhancements/fixes scheduled and timelines approved

- Prepare and plan for data migration

- **Determine what functionality is needed DAY ONE**

USER ACCEPTANCE TESTING (UAT)

▶ Allow at least 4 weeks to complete

▶ Hire additional IIS Help Desk staff and bring them in to test

▶ Have test plans

▶ Understand the difference between system not functioning as designed (bug) and system not functioning as expected

▶ Process all "bug" assignments through the project team leader(s)

  ▶ Not having everyone logging "bugs" helps determine if bug or not (go back to the FDD)
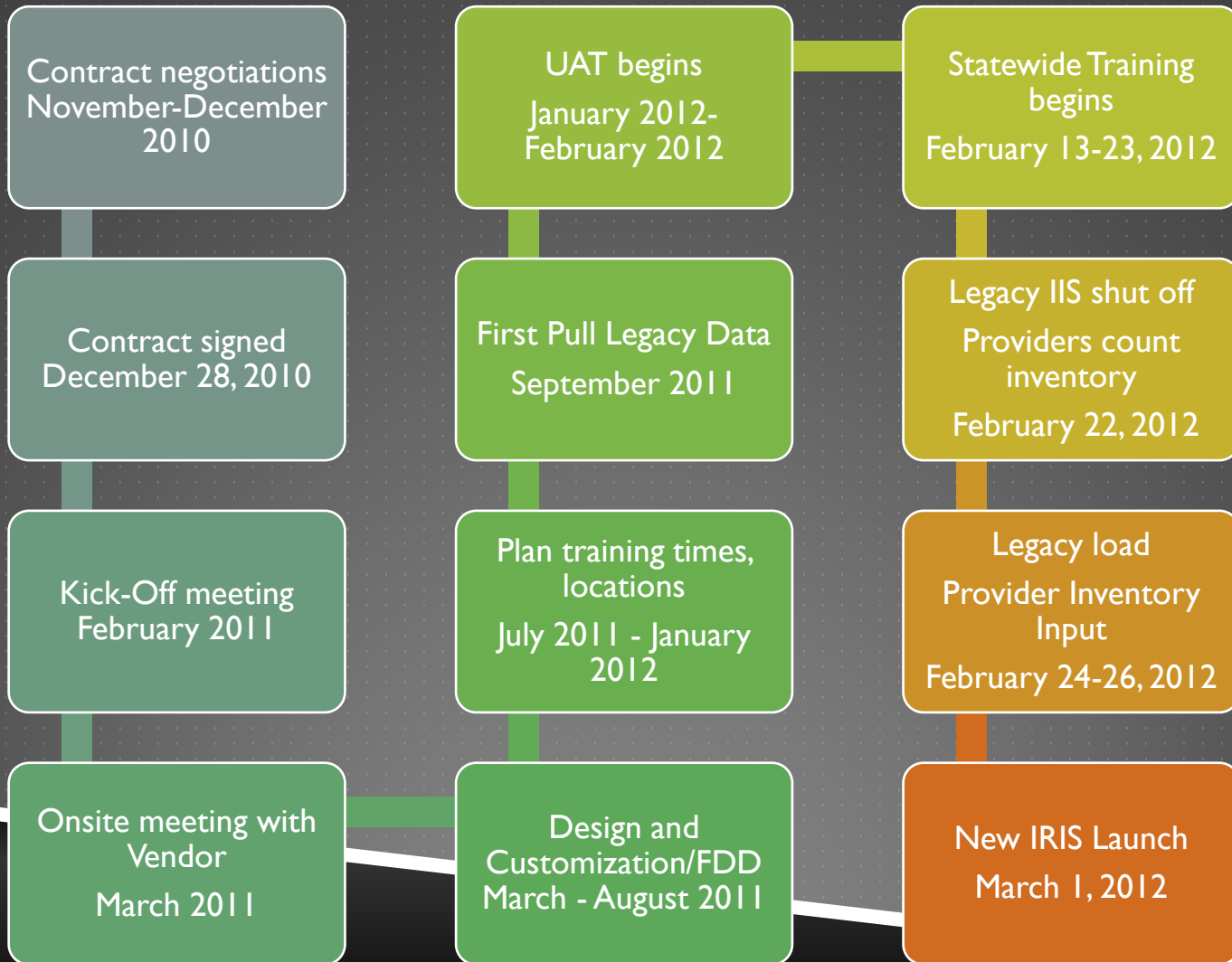
  ▶ Helps prioritize the bug fixes

TRAINING

- ▶ Keep all stakeholders in mind when designing training
- ▶ Design training for different learning styles (online, hands-on, in person) and different locations and times
- ▶ Start preparing early (Idaho started about 8 months ahead)
  - ▶ Send notices about training and important dates at least 4 months prior to training
- ▶ Allow for the unknown (additional equipment needed, etc.)
- ▶ Over-prepare for the rollout (IIS help desk temporary staff – they can always be taken out if workload not enough)
- ▶ Attempt multiple "walk-throughs" of training material with staff

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IMPLEMENTATION

▶ Have a strict "launch" or "day one" and stick to it (this may mean deferring items if necessary)

▶ If using system for ordering/inventory, be organized and plan blackout dates for ordering and data entry

▶ **Do as much as possible for providers** (Idaho has approx. 318 VFC providers so it was manageable)

▶ Consider rolling out additional modules at a later time (school access)

▶ **Be prepared for day one**

PROJECT TIMELINE

Contract negotiations November-December 2010

Contract signed December 28, 2010

Kick-Off meeting February 2011

Onsite meeting with Vendor March 2011

UAT begins January 2012- February 2012

First Pull Legacy Data September 2011

Plan training times, locations July 2011 - January 2012

Design and Customization/FDD March - August 2011

Statewide Training begins February 13-23, 2012

Legacy IIS shut off Providers count inventory February 22, 2012

Legacy load Provider Inventory Input February 24-26, 2012

New IRIS Launch March 1, 2012

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LOOKING TO THE FUTURE

▶ Get used to the new processes to help determine what enhancement work is really needed

▶ Make sure priority levels are defined for future enhancements

▶ Listen to the users for needs and wants for future functionality

▶ For future enhancements or contract amendments, write the FDDs first and make them the scope of work

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LESSONS LEARNED….

▶ Examine closely patient immunization forecasting (understand the vaccine groups)

▶ If doing data exchange: get the specs out and know what the capabilities of your providers' EHR system

▶ "Live in it" approach

▶ Understand there are differences but change brings growth (involve your stakeholders as much as possible in the process. The more buy-in and involvement they have, the better the acceptance)