# STAYING THE COURSE: HEALTHCARE TECHNOLOGY DEPLOYMENTS DURING THE COVID-19 PANDEMIC



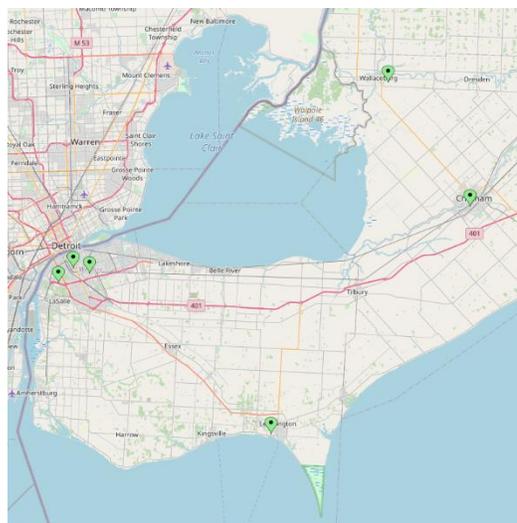# HOW TRANSFORM SSO LEVERAGED MAKE SOLUTIONS' TRANSIT TO GET TO GO-LIVE

A Case Study

*Lyn Baluyot, TransForm SSO
VP & Chief Transformation Officer*

TransForm Shared Service Organization (TransForm SSO) was founded by the five hospitals in the Erie St. Clair1 region of Southern Ontario, Canada (immediately across the border, to the east of Detroit, MI), several of which were operating with a McKesson ADT and Siemens Star system and core departmental systems (such as RIS and LIS) only, while the rest of their clinical activity was being managed on paper. Vice President and Chief Transformation Officer Lyn Baluyot entered the organization with ample experience helping hospitals transition from one electronic health record (EHR) system to another, and knew that coming from a largely paper-based environment to Cerner's EHR there would be some challenges to be overcome.

Geography alone provided a challenge, in that the TransForm SSO IT and project support team have a large geographical area to cover with a relatively small team. It was impractical to station team members at each site throughout the project, so a coordinated approach was needed. A further layer of complexity was added due to the timing of the project, with COVID-19 physical distancing protocols taking effect midstream in March 2020.

Another challenge they faced in the transition for four of the five involved hospitals which were moving onto a common Cerner Millennium® EHR platform was the lack of documented clinical workflows, as the current state for care workflows



*TransForm SSO's geographic area*

was largely to document activities on paper. This provided challenges both for integration testing of the Cerner workflows prior to deployment, and additional challenges for clinical cutover events, as front-line staff adopted EHR technology for the first time.

To tackle the geographical challenges, a regional command centre was established, and a number of tools were implemented to keep teams connected with those they were supporting, particularly after COVID-19 protocols were enforced. Adjustments had to be

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[1] Bluewater Health, Chatham-Kent Health Alliance, Hôtel-Dieu Grace Healthcare, Erie Shores HealthCare and Windsor Regional Hospital

made, according to Lyn, but no bad challenges were encountered due to planning for having a remote team from the beginning. They used GoToMeeting, Microsoft Teams and other connectivity applications for communications. Within the EHR project, MAKE Solutions' TransIT solution was used to mediate integration testing for the remote team, as well as cutover activities.

The team was able to remotely test the Cerner applications, guided by the testing plans in TransIT, in what evolved into a largely work-from-home environment. Since the team wasn't working together physically and were "all over the place", Lyn complemented TransIT's different tools which kept them connected and working toward their common goals. Under the guidance of TransForm's Testing Coordinator Jackie Birr, the project team established "Testing Tuesdays" after their formal integrated testing events. These Testing Tuesdays allowed them to test a total of 32 test scripts over the course of a 3-month period, alongside all their other project activities toward go-live readiness. Since then, they have also completed five rounds of domain validation, consisting of 5 test scripts each round, with a domain checklist built into TransIT guiding the process.

The team initially built out their workflows in Microsoft Visio, translated into Microsoft Excel, and once they adopted TransIT, these were uploaded and then further changes were made within TransIT to build and refine these master copies. Multiple dry run cycles were performed in the CERT environment, which helped Lyn's team to identify users who would need more help, flag connectivity issues, and in particular, workflow issues. The dry runs enabled hospital clinical end-users to identify workflow issues and evaluate whether they could adapt how they work, or if changes would be necessary in the system.

Having recently completed the first and second of their "big bang" go-lives, Lyn is surprised they were able to implement the system in 15 months, given the remote work team and other complications which might have otherwise stood in the way of progress. Lyn gives her team credit for being able to flex with the conditions. She says people have adjusted in spite of COVID fatigue. "The system is as solid as it is, and the time spent nitpicking the workflows to make it the best it can be" served them well. Based on her past experience, she anticipated build issues which largely weren't experienced in this project thanks to integrated reviews of specific workflows, and repeated testing and refinement until everything went smoothly.

Commenting on the TransForm team's use of TransIT, Lyn said it not only helps with integrated testing, they are using TransIT to help support clinical cutover activities and integrated technical cutovers as well. Beyond that, they are tracking daily activities needed to keep the project on track within TransIT. Since all team members can access all the plans and activities at the same time, they have a platform in which a master copy of their test plans could be housed, corrected, maintained, and widely accessible. They went further and

used the test plans, once refined and corrected through rounds of testing, to develop their training materials for clinical staff.

Jackie added that she was able to use TransIT's test planning report to confirm which resources were specifically needed on testing days, which help her to have resources in place to complete the testing, while not reserving subject matter experts who weren't needed on a particular day.

In reviewing the lessons learned after the first two go-lives, Lyn stressed a couple of areas. First, that more dry runs with basic processes utilizing TransIT would allow them to continue to refine what's already been done and built for the final go-live. Second, using TransIT Plans as a communication tool to keep remote team members aligned was critical. Lyn confirmed that TransIT helped with the very successful coordination of the first two go-lives, and the TransForm team will be using it again for the third and biggest.