



Lupus Advisor Implementation Guide

Point-of-Care Partners, LLC

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Lupus Advisor Implementation Guide

Point of Care Partners (POCP) is committed to your having a successful implementation of the Lupus Advisor. This document is a guide to the process to customize the Lupus Advisor to your needs and guide you through the onboarding process.

The information in this document is meant to provide you with an overview of what to expect and recommendations on how to facilitate a smooth implementation of the Lupus Advisor application. It is important to recognize that this document reflects our general approach to implementation; however, the specific details are subject to change based on the circumstances related to your implementation or changes in our internal policies and procedures. More detailed information about your implementation will be provided as part of the Planning phase of the implementation.

Keys to a Successful Implementation Partnership between POCP and your organization

We have found that the most successful implementations are the result of effective partnerships between POCP and you, our users. The process we've designed based on our experience splits ownership of specific tasks between individuals within your organization and those within POCP. It is important to have strong project leadership and active engagement from stakeholders and staff across your organization.

Investing time and resources

During the implementation, POCP will introduce your staff to the Lupus Advisor application and the application placement in your existing workflow. Organizations that invest appropriate time and resources into configuration decisions during implementation are more empowered to maximize the benefits of the Lupus Advisor application. We will provide educational material for Lupus Advisor users to educate them on the benefits and methodology used in the system. It is important that users review the educational piece to drive adoption and long-term use to benefit patients with lupus.

Ensuring consistent use

To optimize workflow and efficiency your staff will need to be encouraged to use Lupus Advisor, ask questions if issues arise, and suggest improvements. The data will build additional value over time and monitoring the use of Lupus Advisor provide data on its success in your organization.

Lupus Advisor Implementation Team

The following are the roles and responsibilities of the team at POCP to support your successful implementation.

Account Manager:

- Healthcare IT project management expert that will serve as your primary point of contact during the implementation.
- Responsibilities: Lead overall project management, scoping, status/issue resolution, and progress tracking.

Implementation Specialist

- Lupus Advisor product expert and lupus practice operations consultant

- Responsibilities: Advise on workflow design and best practices to guide Lupus Advisor configuration and build. Lead project team, super user and end user training to ensure successful go-live.

Interface Engineer

- Healthcare IT data integration expert
- Determine specifications for, configure, and test interfaces alongside POCP representatives.
- Plan, conduct, and mitigate risks related to, data retrieval using APIs from client Epic systems.

Your Implementation Project Team

NOTE: While this represents the desired Project Team members, roles may be determined based on organizational details provided during the planning process. Depending on organizational structure, one person may play multiple roles during the implementation project.

Project Manager

- Serve as POCP’s primary point of contact during the implementation
- Facilitate organization and communication across project team members, end users, key practice stakeholders, subject matter experts, etc.
- Work with the POCP Implementation Project Manager to ensure tasks are assigned and completed on time
- Help identify and mitigate risks to go-live plan

Physician Champion

- Drive input, buy-in, and participation from other providers and key organization stakeholders
- Review and/or ensure other providers review clinical content, including but not limited to clinical criteria, recommendations, actions, order sets, and visit note components.
- Provide physician’s perspective on workflow design, policy, decisions, and other project initiatives

IT Lead

- Coordinate with POCP technical team to complete interface setup.
- Lead technical setup to ensure practice meets Lupus Advisor system hardware and software requirements.

Nurse Champion

- Provide nursing perspective on workflow design, policy decisions, and broader project initiatives

Operational and Clinical Content Subject Matter Experts

- Contribute operational, clinical, and billing content to align with Lupus Advisor, including but not limited to locations, users, regimens, order sets, formulary, visit and text note templates.
- Provide operational, clinical, and billing insights and guidance throughout the implementation
- Provide workflow guidance and support for each functional area including, but not limited to nursing, scheduling, pharmacy, lab, billing, IT, interfaces.

Implementation Phases and Responsibilities

There are 4 phases to the Lupus Advisor implementation process. Below are descriptions of the phases and each team’s core responsibilities.



Phase 1: Planning

Goals: Initial team introductions and expectation-setting: Practice research and pre-work to facilitate project kickoff

POCP Responsibilities:

- Review Client information to prepare for implementation
- Identify POCP Team members
- Coordinate a kickoff call
- Construct a detailed implementation timeline
 - Determine the required resources for implementation tasks
- Review the *Lupus Advisor Implementation Worksheet* when completed

Your Responsibilities:

- **Engage Your Epic Support Team**
 - Contact your internal IT resources to notify them of the need for Lupus Advisor and the intent to move forward.
- **Establish Project Team**
 - Identify the appropriate staff members to fill the roles outlined in the Client Project Team Members section above
- **Configuration Planning**
 - Determine which users will see the Lupus Advisor and the patient criteria for the appearance of the Lupus Advisor
 - Review the Lupus Advisor recommendations and complete the *Lupus Advisor Implementation Worksheet*
 - For each selected recommendation in the Lupus Advisor identify one or more corresponding order sets to accommodate the guidelines your organization selects. For each recommendation record the related order set names and the item numbers in the *Lupus Advisor Implementation Worksheet*.
 - Review your current patient education and identify patient education that can be included with each recommendation either as part of an order (or order set) or as a prompt to review during the visit.
- **Validation**
 - Validate the codes being used by Lupus Advisor are in use in your Epic system
 - Drug identifiers
 - Lab Results
 - Diagnoses
 - Procedures
 - Patient education

Phase 2: Configuration and Testing

Goals: Configure and test the Lupus Advisor

- *Epic Request Document can be found [here](#).*

POCP Responsibilities

- Sends appropriate agreement(s) to the Requesting Organization POCP for execution
- Enable Keys for the Requesting Organization and Create a Client ID
- Configure Lupus Advisor application according to the approved *Lupus Advisor Implementation Worksheet*
- Configure the interface between Lupus Advisor and your Epic system
- Test and resolve interface issues identified during the set up with Epic support if needed
- Engage with and provide regular progress updates to project leadership
- Collaborate with you on developing end-user education
- Collaborate with you to configure testing scripts for Lupus Advisor
- Conduct a 30-day go-live readiness assessment

Your Responsibilities

- Go to the Epic Connection Hub: <https://fhir.epic.com/ConnectionHub> and search for Lupus Advisor
- Execute appropriate agreements
- Configure Lupus Advisor access, including, but not limited to users, locations, resources and target patients
- Edit existing order sets to match guidelines where necessary
- Work with Epic authorized customer analyst and POCP to determine change management controls needed to promote the app into the production (PRD) environment.
- Work with POCP technical team to configure and test
- Validate points of integration
- Test input data to Lupus Advisor and the returning data:
 - Patient data retrieval from Epic
 - Orders and notes returning to the Epic system
 - Occurrence based on target patient and user types.

Phase 3: Go-Live

Goals

- Have a successful launch of Lupus Advisor
- Educate users on Lupus Advisor benefits and use
- Provide go-live support for their initial uses
- Triage and resolve issues identified during go-live

POCP Responsibilities

- Provide educational material on the use of Lupus Advisor
- Track issues identified during testing and document a resolution plan
- Support users in their first uses of Lupus Advisor
- Triage and resolve issues identified during go-live, in collaboration with your organization

Your Responsibilities

- Roll out education to your users

- Monitor Lupus Advisor use by user
- Report issues and collaborate with POCP as needed in resolution

Phase 4: Evaluation

Goals: Continue to track and work through issues identified during go-live and measure the overall use of Lupus Advisor

- Evaluate the use of Lupus Advisor to identify any issues
- Measure acceptance of the order sets as an indicator of the quality of the recommendations post launch

POCP Responsibilities:

- Track and collaborate with Client in resolving issues identified during go-live
- Transition Lupus Advisor support to the POCP Help Desk
- Conduct a Post Implementation Review
- Provide reports on Lupus Advisor use quarterly

Your Responsibilities

- Collaborate with POCP in resolving issues identified during go-live
- Review reports and identify updates needed
- Create suggestions for updates to recommendations and related order sets
- Consider expansion of access to Lupus Advisor to other users

Implementation FAQs

Q: When will my organization go live?

A: Your Lupus Advisor implementation team will work with you to establish a go-live date during the Planning phase based on:

- Project scope and complexity
- Your organization's size and complexity
- Your organization's dedicated project resources
- Specifics of interfaces between Lupus Advisor and your Epic implementation
- Scheduling of holidays, staff availability, and other organizational initiatives
- POCP overall go-live schedule and Implementation team availability

Q: What can I do to help make my implementation successful?

A: We have found that the most successful implementations include the following:

- Strong organizational leadership committed to the project and able to motivate organizational staff
- Appropriate staff and time allocated to the project, based on recommendations from the POCP team provided during the Planning phase, including Physician Champion and strong subject matter experts, operational champions for IT, and supplemental help from Pharmacy and Lab when questions arise
- Active engagement by, and regular, consistent communication across, all involved parties
- Comprehensive end user and 'super user' education

Q: What data will be accessed via API's in my EHR?

A: Each client site has a different set of data elements that they can provide us to use in the library of recommendations and/or load into the clinical rules engine in the Lupus Advisor system. Refer to your contract or Lupus Advisor Project Manager for more info.

Q: What data will I have to enter manually into the Lupus Advisor system?

A: Depending on your Epic configuration, and data availability the Lupus Advisor will load as many data elements as possible at the start of each visit using the Lupus Advisor. There are some data elements that may not be available and may need to be entered manually during the patient evaluation. These include but are not limited to the following:

- Patient observations not available in a current diagnosis or lab value in your system
- Lab values recorded as a PDF or other non-standard format
- Order sets (clinical) not related to a recommendation in your configuration
- Active/future patient orders, authorization, and appointments (authorizations/scheduling)
- Patient Education Resources