

# From Choosing To Using Your Complete EMR Solution **2**

*A forum presented by POSP*

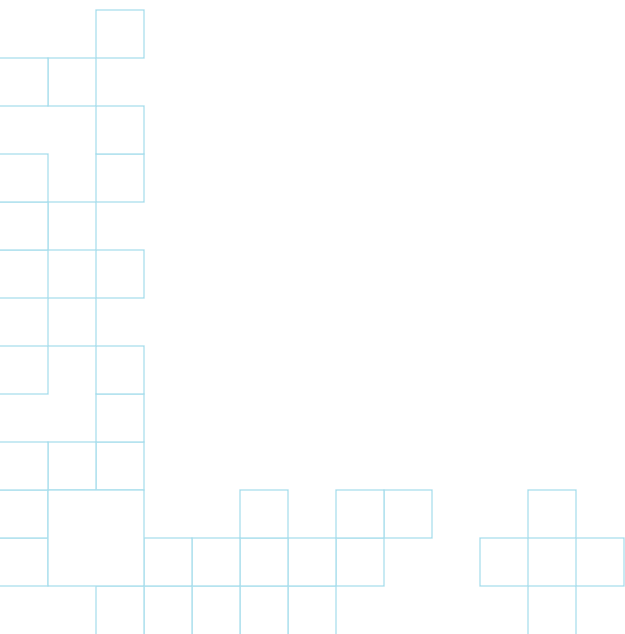
**May 13 & 14, 2010**

Coast Plaza Hotel and Conference Centre, Calgary



**“ I find it incredibly rewarding that by using the EMR,  
I am able to manage the health of the community in  
which we live. ”**

**Michael Brand, Clinic Manager and POSP Peer Leader**



## The Physician Office System Program

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The role of the Physician Office System Program (POSP) is to enable the use of *electronic medical records* by physicians, who provide insured services in Alberta, to improve patient care and support best practice care delivery within Alberta's electronic health environment.

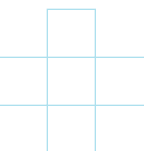
Through a combination of funding, information technology services and change management services, POSP has helped close to half of Alberta's practicing physicians to incorporate information technology into their practices.

Some of the initiatives that POSP supports or is responsible for include:

- Developing solutions to move patient data from one physician office system to another.
- Reducing the risk of data loss in physician offices caused by human, hardware or software failure.
- Working with stakeholders to update the Vendor Conformance and Usability Requirements (VCUR) for physician offices. These requirements are reviewed regularly to ensure they continue to reflect the needs of all stakeholders.
- Collaborating with Alberta Health Services and Alberta Health and Wellness to provide integration and interoperability with provincial systems (e.g., the Pharmaceutical Information Network (PIN), lab test results and diagnostic imaging text reports).
- Supporting physician compliance with the *Health Information Act* by providing resources to conduct privacy impact assessments.
- Providing a broad range of change management services to support those physicians who are already automated and who depend on their EMR solutions to be fully functional every day.

**“ The new complete EMR solutions include IT support that is well defined and is 24/7. That support will make a huge difference in that the physician will not have to hire IT support. ”**

Neil Cooper, Pediatrician and POSP Peer Leader



## Program Director's Message

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On behalf of our partners, Alberta Health and Wellness, Alberta Health Services and the Alberta Medical Association, it is my pleasure to welcome you to the Physician Office System Program's (POSP) *From Choosing to Using Your Complete EMR Solution 2*.

Whether you are investigating electronic medical records for the first time or are considering an upgrade to a new POSP-funded complete EMR solution, our goal for this event is that it provides you with the information and tools that you need to make your decision-making process or transition smoother.

POSP's qualified service providers—Med Access, Practice Solutions and Wolf Medical Systems—provide turnkey solutions which include software, hardware, networking, interoperability and 24/7 support within the total cost. Our program's recent renewal ensured that the EMRs offered by these vendors meet increased physician expectations in terms of functionality and system support, and better align with other provincial health initiatives.

Due to the vision and commitment of our health industry partners, Alberta continues to lead the way in EMR uptake across North America. Substantial resources allocated through the tripartite process support the deployment of the new solutions and reimbursement to physicians for their use.

Over the past few months, POSP has been successful in finding solutions to outstanding data management issues and is now transitioning clinics between EMR solutions with defined options for data migration and record retention.

Over the next two days, you will gain a comprehensive understanding of POSP, its benefits, the services and supports that are available to assist your clinic, as well as an up close look at the exciting new complete EMR solutions that are now available in Alberta. You will hear from your peers—Alberta physicians and clinic managers—who are currently engaged in the transition process, who will share their personal experiences and lessons learned during their POSP EMR journey.

Reliable, integrated and comprehensive patient records are a critical piece of how our health information systems work. I encourage you to use this event to increase your EMR knowledge and understanding and to take advantage of the enhanced capabilities of the new complete EMR solutions that are now available in Alberta.

**David Ulis**

*Program Director, POSP*

**“ With chronic disease management, you often have multi systems involved, multi drugs involved, multi treatments involved—an EMR allows you to integrate all those components into one. ”**

*Clayne Steed, Family Physician and POSP Peer Leader*

## Program Accreditation

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This program meets the accreditation criteria of the College of Family Physicians of Canada and has been accredited by the Alberta Chapter for up to 9.5 Mainpro-M1 credits.

*Note: The evening vendor demonstrations do not qualify for Mainpro credits.*

## Learning Objectives

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### Day 1 – Choosing a Complete EMR Solution

After attending Day 1 of this conference, participants should be able to:

- Recognize the benefits of using a complete electronic medical record (EMR) solution to enhance patient care and operational management
- Identify the steps involved in preparation and implementation of a complete EMR solution
- Appraise the experience of preparation and implementation of a complete EMR solution
- Identify the provincial electronic health systems and initiatives available in Alberta
- Evaluate the POSP-funded complete EMR solutions that are available in Alberta

### Day 2 – Using a Complete EMR Solution

After attending Day 2 of this conference, participants should be able to:

- Demonstrate and evaluate the approaches to using the system tools in the complete EMR solution for systematic patient care and comprehensive operational management
- Recognize the benefits of using the features and clinical decision support tools available in the complete EMR solutions
- Integrate the EMR into clinical care more effectively

## Forum Planning Committee

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The Physician Office System Program gratefully acknowledges the support and advice provided by the following peer leaders and other members of the POSP 2010 Forum 2 Planning Committee:

Neeraj Bector – MD, CCFP (Edmonton)

Mirella Chiodo – Informatics Coordinator (Edmonton)

Michel Donoff – MD, CCFP (Edmonton)

Andrew Dottridge – MD, CCFP (Calgary)

Allison Duddin – Assistant Clinic Manager (Calgary)

Heidi Fell – MD, CCFP (Calgary)

Barbra McCaffrey – EMR Learning and Advancement Specialist, POSP (Edmonton)

Lonnie Konefall – Administrator (Lethbridge)

Jacqueline Schimpf – Communication Consultant, POSP (Edmonton)

David Stewart – MD, CCFP (Lethbridge)

Charlotte Sugimoto – Assistant Clinic Manager (Lethbridge)

# From Choosing To Using Your Complete EMR Solution **2**

Thursday, May 13, 2010  
Choosing a Complete EMR Solution

All day-time sessions will be in **Plaza 2**.

8:00 – 9:00 a.m.	<b>Breakfast and Registration</b>
9:00 – 9:10 a.m.	<b>Opening Remarks</b> Jacqueline Schimpf, Conference Moderator
9:10 – 10:00 a.m.	<b>POSP Program Overview</b> David Ulis, Program Director, POSP
10:00 – 10:30 a.m.	<b>EMR Use Supporting Patient Care</b> Dr. Fraser Armstrong, General Practitioner, Alberta Medical Association
10:30 – 10:45 a.m.	<b>AMA: Support for EMR Use</b> Stephanie Crichton, Practice Management Consultant, Alberta Medical Association
10:45 – 11:00 a.m.	<b>Break</b>
11:00 – 11:30 a.m.	<b>Provincial Strategies and Systems that Support Alberta Clinics and EMR Users</b> Todd Herron, Team Lead, Solution Design and Maintenance, POSP
11:30 a.m. – 12:15 p.m.	<b>Preparing to Implement a Complete EMR Solution</b> Dr. Neil Cooper, Pediatrician, Sunnyhill Pediatric Clinic and President, Calgary Community Pediatric Association Kevin Cathro, Deployment and Operations Director, POSP Mel Snihurowych, Clinical Process Analyst & Facilitator, POSP
12:15 – 1:15 p.m.	<b>Lunch and Booth Networking</b>
1:15 – 1:30 p.m.	<b>Privacy and Security in the EMR World</b> Deborah Turnbull, Privacy Specialist, POSP
1:30 – 2:00 p.m.	<b>Transitioning from Paper to an EMR</b> Dr. Sidney Harrison, Family Physician Maggie Harrison, Clinic Manager
2:00 – 2:30 p.m.	<b>Benefits of Hosting Data Offsite with an EMR Upgrade</b> Drs. Andrew Dottridge and Heidi Fell, Family Physicians, Symons Valley Firstcare
2:30 – 2:55 p.m.	<b>Break and Booth Networking</b>
2:55 – 3:55 p.m.	<b>Data Migration in an EMR Implementation</b> Dr. Scott Wilson, Neurologist Kevin Cathro, Deployment and Operations Director, POSP
3:55 – 4:25 p.m.	<b>Closing Keynote – A Practice Vision: Steps to Achieving Effective EMR Use</b> Dr. Alan Brookstone, Founder and CEO, CanadianEMR
4:25 – 4:30 p.m.	<b>Closing Remarks and Evaluation</b> Jacqueline Schimpf, Conference Moderator
4:30 – 5:15 p.m.	<b>Dinner and Networking</b>

5:15 p.m.	<b>Electronic Medical Record Vendor Demonstrations</b>
5:15 – 5:30 p.m.	<b>Welcome</b> Barbra McCaffrey, EMR Learning and Advancement Specialist, POSP
5:30 – 6:30 p.m.	<b>Vendor Demonstrations – Session 1</b> Primary Care – Wolf Medical Systems Administrator – Practice Solutions Specialist – Med Access
6:30 – 6:45 p.m.	<b>Break</b>
6:45 – 7:45 p.m.	<b>Vendor Demonstrations – Session 2</b> Primary Care – Practice Solutions Administrator – Med Access Specialist – Wolf Medical Systems
7:45 – 8:00 p.m.	<b>Break</b>
8:00 – 9:00 p.m.	<b>Vendor Demonstrations – Session 3</b> Primary Care – Med Access Administrator – Wolf Medical Systems Specialist – Practice Solutions
9:00 – 9:05 p.m.	<b>Evaluations and Close</b>

Vendors will be located in the following rooms:

**Med Access** – Plaza 3

**Practice Solutions** – Plaza 4

**Wolf Medical Systems** – Plaza 5

Steve Bergg, VP Sales and Marketing

Sharon Cheema, Account Manager

John Plouffe, Account Manager

Susie Randhawa, Account Executive

## Vendor Demonstrations

These electronic medical record (EMR) product demonstrations will highlight the features, functionality and benefits of POSP's three qualified service provider (QSP) VCUR 2008 EMR solutions to assist you in assessing each solution's capabilities to meet your clinic/PCN needs.

Three streams of structured demonstrations from each of the qualified service providers—Med Access, Practice Solutions and Wolf Medical Systems—will be held: one for primary care clinicians, one for clinic managers/administrators and one for specialists. You can choose which demonstration(s) you would like to attend.

“ The EMR has made the workflow in our office much more streamlined and efficient, everything from getting a referral and keeping records of who needs to be seen, to organizing a wait list. ”

Scott Wilson, Neurologist and POSP Peer Leader

# From Choosing To Using Your Complete EMR Solution

Friday, May 14, 2010  
Using a Complete EMR Solution

Time	Med Access	Practice Solutions	Wolf Medical Systems
	Dr. David Moores Dr. Michel Donoff Mirella Chiodo <i>Royal Alexandra Family Medicine Centre, Edmonton</i>	Dr. David Stewart Charlotte Sugimoto Lonnie Konefall <i>Family Medical Centre, Lethbridge</i>	Dr. Heidi Fell Dr. Andrew Dottridge <i>Symons Valley Firstcare, Calgary</i> Alison Duddin <i>South Calgary Medical Clinic, Calgary</i>
8:00 – 8:35 a.m.	<b>Breakfast</b>		
8:35 – 8:55 a.m.	<b>Opening Remarks</b> – Barbra McCaffrey, EMR Learning and Advancement Specialist, POSP <b>Opening Keynote</b> – <b>From Using to Integration</b> – Michael Brand, Associate Medical Centre, Taber		
9:00 – 10:20 a.m.	<b>A. Operations Management</b> Scheduling Billing Clinic management tools Office communication Scanning and faxing Privacy & security settings	<b>B. Basic Patient Care</b> Patient care encounters Prescribing Recalls Reminders Referrals and consults Using templates	<b>C. Advanced Patient Care</b> Care planning Searches Health screening Chronic disease management Tools for repetitive actions
10:20 – 10:40 a.m.	<b>Break</b>		
10:40 – 12:00 p.m.	<b>B. Basic Patient Care</b> Patient care encounters Prescribing Recalls Reminders Referrals and consults Using templates	<b>C. Advanced Patient Care</b> Care planning Searches Health screening Chronic disease management Tools for repetitive actions	<b>A. Operations Management</b> Scheduling Billing Clinic management tools Office communication Scanning and faxing Privacy & security setting
12:00 – 1:00 p.m.	<b>Lunch</b>		
1:00 – 2:20 p.m.	<b>C. Advanced Patient Care</b> Care planning Searches Health screening Chronic disease management Tools for repetitive actions	<b>A. Operations Management</b> Scheduling Billing Clinic management tools Office communications Scanning and faxing Privacy & security settings	<b>B. Basic Patient Care</b> Patient care encounters Prescribing Recalls Reminders Referrals and consults Using templates
2:20 p.m.	<b>Evaluations &amp; Close</b>		

## Session Summaries

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### POSP Program Overview

**Thursday, May 13, 9:10 – 10:00 a.m.**

*David Ullis, Program Director, POSP*

Close to half of Alberta's practicing physicians have incorporated information technology into their practices. What is the role of the Physician Office System Program (POSP) in enabling clinics like yours to transition to an electronic medical record (EMR) and what support does it provide?

The new POSP complete EMR solutions are now in the Alberta market. How are these new 'turnkey' solutions different? Do these improved solutions meet increased physician expectations of more robust EMR platforms with better tools, functionality and system support, which better align with other health initiatives? How many implementations of the new solutions have taken place and is data migration proving to be successful? Will funding be in place to extend the POSP program beyond March 31, 2011?

#### Learning Objectives

- Recognize the role of POSP and its available services
- Recognize the benefits of adopting a new complete EMR solutions

### EMR Use Supporting Patient Care

**Thursday, May 13, 10:00 – 10:30 a.m.**

*Fraser Armstrong, General Practitioner, Alberta Medical Association*

Representing the physician voice of the Alberta Medical Association, Dr. Armstrong will provide an upbeat, entertaining explanation of the benefits that accrue to the physician and clinic team as a result of incorporating an EMR into clinical practice.

#### Learning Objectives

- Recognize the benefits of incorporating an EMR into clinical practice.

### AMA: Support for EMR Use

**Thursday, May 13, 10:30 – 10:45 a.m.**

*Stephanie Crichton, Practice Management Program Consultant, Alberta Medical Association*

The Alberta Medical Association strongly supports the use of electronic medical records, advocating for physician needs from their EMRs as they work to put Patients First.

### Provincial Strategies and Systems that Support Alberta Clinics and EMR Users

**Thursday, May 13, 11:00 – 11:30 a.m.**

*Todd Herron, Team Lead, Solution Design and Maintenance, POSP*

Where does the EMR fit into Alberta's other electronic health strategies? What is the status and future direction of provincial e-health initiatives? How do Alberta Health and Wellness and Alberta Health Services e-health initiatives impact EMR users in Alberta?

#### Learning Objectives

- Understand Alberta's electronic health strategy and where the EMR fits into it
- Identify the systems, services and initiatives within Alberta's electronic health environment that align to meet the needs of health services and physician offices to support best practices in patient care

### Preparing to Implement a Complete EMR Solution

**Thursday, May 13, 11:30 a.m. – 12:15 p.m.**

*Neil Cooper, Pediatrician, Sunnyhill Pediatric Clinic and President, Calgary Community Pediatric Association*

*Kevin Cathro, Deployment and Operations Director, POSP*

*Mel Snihurowych, Large Group Facilitator, POSP*

Change can be difficult and transitioning to a new EMR is no exception. What service and supports can you expect from POSP as you enter the decision-making process and then prepare to implement your EMR? Are there any benefits from a group deployment such as a Primary Care Network (PCN) or a Community of Practice? Learn how POSP guides clinics through the transition process and

supports clinics and PCNs even before a vendor contract is signed.

Hear first-hand commentary from Calgary pediatrician Neil Cooper, president of the Calgary Community Pediatric Association, on the decision to select one EMR for their community of practice and the role POSP played in assisting their selection process.

#### Learning Objectives

- Understand how POSP supports clinics through change management and other services
- Identify the steps involved in choosing an EMR
- Recognize the value of POSP Change Management services
- Understand the importance of following a systematic approach to the decision-making process

## Privacy and Security in the EMR World

**Thursday, May 13, 1:15 – 1:30 p.m.**

*Deborah Turnbull, PMP, Privacy Specialist, POSP*

All clinics are responsible for maintaining the privacy and security of their patient records. As clinics transition to an electronic medical record, there are procedures and best practices that need to be considered to maintain privacy. This session will provide a practical primer for clinics on privacy best practices and POSP services that help to support these practices.

#### Learning Objectives

- Understand privacy and security issues as related to an EMR
- Recognize best practices that need to be considered to maintain privacy

## Transitioning from Paper to an EMR

**Thursday, May 13, 1:30 – 2:00 p.m.**

*Sidney Harrison, Family Physician, CCFP  
Maggie Harrison, Clinic Manager*

Family physician, Sidney Harrison and his clinic manager and wife, Maggie, share benefits realized and lessons learned from their recent clinic transition from paper to an electronic medical record.

#### Learning Objectives

- Identify the steps involved in a structured transition from paper to EMR

## Benefits of Hosting Data Offsite with an EMR Upgrade

**Thursday, May 13, 2:00 – 2:30 p.m.**

*Dr. Andrew Dottridge, Family Physician, Symons Valley Firstcare*

*Dr. Heidi Fell, Family Physician, Symons Valley Firstcare*

POSP peer leaders and clinic partners Dr. Andrew Dottridge and Dr. Heidi Fell share the story of their EMR upgrade including the value of the services and supports received from POSP, the rewards of hosting data offsite and their discovery that even “super-users” can benefit from additional EMR training.

#### Learning Objectives

- Understand the benefits and value of moving to an application service provider (ASP) environment with a complete EMR solution
- Recognize the value of the POSP change management advisor and portfolio coordinator roles in supporting a clinic through an implementation

## Data Migration in an EMR Implementation

**Thursday, May 13, 2:55 – 3:55 p.m.**

*Scott Wilson, Neurologist*

*Kevin Cathro, Deployment and Operations Director, POSP*

If your clinic will be transitioning between EMRs, the issue of moving and storing patient may be foremost on your mind. POSP has been successful in addressing data migration and records retention issues and has begun to migrate clinics between EMR platforms. What advances has POSP made in data management? What data migration and record retention options are available to your clinic? How is success being achieved?

Calgary Neurologist Scott Wilson takes you on his EMR transition journey. He shares lessons learned through POSP's Custodian Assessment Service and data management processes, explains the changes necessary to the clinic's privacy impact assessment, and details the operational and patient care benefits realized as a result of using an EMR.

#### Learning Objectives

- Recognize that data management (data migration and records retention) options available through POSP
- Understand the steps necessary to a successful implementation

## Keynote Presentation – A Practice Vision: Steps to Achieving Effective EMR Use

Thursday, May 13, 3:55 – 4:55 p.m.

*Alan Brookstone, MD, CEO CanadianEMR*

Whether a new user or transitioning from one EMR solution to another, running an EMR-based practice is a state of mind. Many physicians and office staff never fully utilize their EMRs beyond a very basic level. The 2007 National Physician Survey suggested that less than 10 percent of physicians use their EMRs effectively. This is partly because many users see their EMR as an electronic version of the paper record. However, the EMR opens up a great number of opportunities that were never possible in a paper record. Dr. Brookstone will focus on strategies you can use to develop an EMR philosophy that will help you use your system more effectively and become self-sufficient as a practice team. In addition, he will look to the future of EMRs and how they could be used for more effective population health, integrated with mobile devices and personal health records.

- Developing an EMR practice philosophy – How physicians and staff should begin to think of the new tools that they have at their fingertips
- Getting your internal house in order – What practices should be doing to prepare for effective utilization of their EMRs
- Goal setting in your EMR practice – It's not a sprint, it's a marathon. Integrating continuous improvement principles
- Dealing with unexpected adversity – How to manage gaps in your EMR's functionality
- Steps towards self-sufficiency – Communications, expectation setting with your EMR vendor, provincial program and colleagues

- What does the future hold? Population health? Mobile Healthcare? Personal Health records? Telehealth?

### Learning Objectives

- Define an EMR practice philosophy—how you should be thinking of the new tools that you have at your fingertips
- Identify what your clinic should be doing to prepare for effective utilization of its EMR
- Set goals in your EMR practice and determine how to integrate continuous improvement principles
- Describe the steps toward self sufficiency: communications; expectation setting with your EMR vendor, provincial program and colleagues
- Recognize what the future may hold: population health, mobile healthcare, personal health records, telehealth

## Opening Keynote – From Using to Integration

Friday, May 14, 8:35 – 8:55 a.m.

*Michael Brand, Clinic Manager, Associate Medical Centre*

The Associate Medical Centre in Taber has been automated with an electronic medical record (EMR) for 10 years and is a striking example of a clinic that has embraced electronic data management and set a vision to ensure their EMR is meeting its potential in improving patient care. The ability to properly document and gather patient data from within an EMR is the basis for good panel management based on clinical practice guidelines. Michael Brand, clinic manager, will describe how the clinic has used the information from its EMR to guide informed clinical decision making that has had a measurable effect on patient care.

### Learning Objectives

- Recognize the possibilities and potential within an EMR to improve patient care

“ A peer can tell you what it's really like to use an EMR, particularly if it's the same specialty—a GP talking to a GP, an ortho talking to an ortho. ”

*Mirella Chiodo, Informatics Coordinator and POSP Peer Leader*

## Forum Speakers

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### Keynote Speakers

**Dr. Alan Brookstone** –

Dr. Brookstone is a family physician and the founder of CanadianEMR. He is a nationally and internationally recognized expert in the field of EMR adoption and use. He chairs the Canada Health Infoway Clinical Subcommittee on Standards, acts as an advisor to the Alberta, British Columbia and Ontario EMR programs, and is an international advisor to Singapore on their national GP EMR strategy. In 2007, he gave up his clinical practice to focus full time on Health IT Consulting.



**Mr. Michael Brand** –

Mr. Brand is the Clinic Manager of the Associate Medical Centre (1994) in Taber, Alberta—a 10 doctor family practice in a rural community in Southern Alberta. His clinic has been a pilot site for rural application service provider (ASP) testing and has used an electronic medical record since 1999. He is Past President of both the Alberta Association of Clinic Managers and the Medical Group Managers Association of Canada. Brand is involved with POSP as a peer leader, providing expertise on the Standards Development Team and an evaluator for Vendor Conformance and Usability Requirements (VCUR) testing. He has been involved in all four phases of standards development and vendor accreditation in Alberta since 2000.



### Presenters and Peer Leaders

**Ms. Mirella Chiodo** – Ms. Chiodo is the Informatics Coordinator for the Department of Family Medicine at the University of Alberta. Her responsibilities include managing the departmental IT needs and EMR solutions for the four Academic teaching clinics as well as coordinating new e-learning initiatives. She also has a role as a member of the Alberta AIM Faculty assisting physicians and their team's focus on access, efficiency and clinical care improvements. Chiodo has spent 25 years with Capital Health,

the last 20 at the Royal Alexandra Hospital Family Medicine Centre as the Business Manager and Project Coordinator for the physicians group. She has been a POSP peer leader for six years.

**Dr. Neil Cooper** – Dr. Cooper is a pediatrician at the Sunnyhill Pediatric Clinic in Calgary. As President of the Calgary Community Pediatrics Association, he is working toward a common EMR solution for 35 Calgary pediatricians. He has used several EMRs in various practice settings since 2003 and has been long time user of voice recognition technology. Dr. Cooper has been involved as a peer leader with POSP since 2008.

**Dr. Michel Donoff** – Dr. Donoff has been a family physician in Edmonton for 30 years, primarily at the Royal Alexandra Family Medicine Center, where the clinic has been using the Med Access electronic medical record for seven years. He is also the Director of Information Management for the Department of Family Medicine at the University of Alberta. He has been working with POSP as a peer leader for several years.

**Dr. Andrew Dottridge** – Dr. Dottridge graduated from the University of Cape Town, South Africa, in 1986. He immigrated to Canada in 1992 and worked in rural practice for 10 years as a GP Anesthetist in Saskatchewan and then in Rocky Mountain House, Alberta. In 2002, he founded Symons Valley Firstcare in Calgary, a family practice clinic with a fully integrated EMR. In addition, Dr. Dottridge is a program physician at the Cardiac Wellness Institute of Calgary and has been a POSP peer leader on the Wolf Medical System EMR solution since 2007.

**Ms. Alison Duddin** – Ms. Duddin has been the Assistant Clinic Manager with South Calgary Medical Clinic for four years. The clinic, which has had an EMR since 1989, transitioned to the Wolf Medical System EMR in August 2008. Over the last year, the clinic has significantly improved its workflow and has just upgraded to the most current version of the Wolf EMR. Alison is involved in administrative IT for the clinic, scheduling and legal for all 25 doctors and is also responsible for reception supervisor and clinic manager duties. She has been a POSP peer leader since 2009.

**Dr. Sidney Harrison** – Dr. Harrison graduated from the University of Alberta in 1990 and completed his family medicine residency at the Royal Alexandra Hospital in 1992. In addition to his family practice, Dr. Harrison currently works at the Medicine Hat Regional Hospital and practices obstetrics as part of the Family Medicine Maternity Clinic. He also teaches both clinical clerks from the University of Calgary and family medicine residents as part of the Rural Alberta South Family Medicine Residency Program. His clinic, which is part of the Palliser Primary Care Network, chose their first EMR last year and started using their new Med Access EMR solution earlier this year.

**Mrs. Maggie Harrison** – Mrs. Harrison has been the clinic manager at Dr. Harrison's clinic for 18 years. She played an integral role in the decision-making process of choosing the clinic's new EMR solution.

**Dr. Heidi Fell** – Dr. Fell graduated from the University of Calgary with her MD in 1995, completed her family medicine residency in Calgary in 1997 and has been in family practice ever since. Dr. Fell has been a peer leader with POSP since 2003 on the Wolf Medical System EMR solution, and enjoys working with physicians and their colleagues on all aspects of the automation journey.

**Dr. David Moores** – Dr. Moores has been a family physician in Edmonton for 20 years, practicing primarily out of the Royal Alexandra Family Medicine Centre. He and his colleagues have been using Med Access as their electronic medical record for seven years. Family medicine residents and medical students working out of the practice use it as well. Dr. Moores is a Professor of Family Medicine at the University of Alberta and was the departmental chair from 1990 to 2000. He has been involved with POSP since its inception.

**Dr. David Stewart** – Dr. Stewart is a Certificant of the College of Family Physicians of Canada and graduated from the University of Calgary in 1997. He is an Associate Clinical Professor at the University of Calgary and has been working with the Rural Alberta South (RAS) Family Medicine Residency Program in Lethbridge since its inception, both as a Family Medicine Preceptor and in the Obstetrical Rotation. This clinic was one of the first to use an EMR in Alberta. Dr. Stewart has been using Practice Solutions EMR software since 2007, previously using both

National Medical Solutions and EMIS. Dr. Stewart joined the POSP Peer to Peer program in 2009.

**Ms. Charlotte Sugimoto** – Ms. Sugimoto is the Assistant Manager at the Family Medicine Centre in Lethbridge, a clinic with six full-time and two part-time physicians and one gastroenterologist in a multidisciplinary environment. She has become the clinic's computer expert having used an EMR for over six years and Practice Solutions software since 2007. Charlotte is also familiar with the AIM initiative and generating reports for the program. Ms. Sugimoto became a POSP peer leader in 2009.

**Deborah Turnbull** – Ms. Turnbull is a partner with Tricon Solutions Inc., and has been working as a privacy specialist with POSP for the last three years. She has over 25 years experience working with organizations as a project manager implementing information technology solutions for businesses in a variety of industries.

**Dr. Scott Wilson** – Dr. Wilson is a neurologist in Calgary whose clinic has been automated with an EMR since 2003. His busy general neurology practice uses the EMR extensively including voice recognition dictation and transcription of letters. Dr. Wilson has been a peer leader with POSP since 2008.

## AMA Presenters

- **Fraser Armstrong**, MD, FCPP, Associate Clinical Professor, Department of Family Medicine, University of Alberta, and Co-chair, POSP Committee
- **Stephanie Crichton**, Practice Management Program Consultant, Alberta Medical Association

## POSP Presenters

- **Kevin Cathro**, Deployment and Operations Director
- **Todd Herron**, Team Lead, Solution Design and Maintenance
- **Mel Snihurowych**, Large Group Facilitator
- **David Ulis**, Program Director

## Moderator

- **Jacqueline Schimpf**, Communication Consultant, POSP

## Common Definitions

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**Application Service Provider (ASP)** – A model that offers individuals or entities secure access over the Internet to application programs and related services. This mode of service delivery reduces or eliminates the need for local technical support.

**Change Management Advisor (CMA)** – Staff/contractors hired by the Physician Office System Program to provide support services to physicians who are implementing or using electronic medical records.

**Change Management Services** – Support services provided to physicians and clinic staff as they adapt to the altered work processes and relationships resulting from the introduction of electronic medical record (EMR) technology into their practices or moving from one EMR solution to another.

**Community of Practice (CoP)** – A group of practices that collaborate to improve services to a shared patient population. This group or service area may share a physical building or be located across a community.

**Data Migration** – The process of transferring information (data elements) from one physician office solution to another. The Physician Office System Program data migration process includes the following three steps:

- Data Extraction – extracting patient demographics, scheduling information, and medical summary of patient clinical data from the current physician office system.
- Data Conversion – converting the extracted data into a format that is acceptable for loading into a new qualified service provider VCUR 2008 solution
- Data Loading – loading the data into the new qualified service provider VCUR 2008 solution.

**Electronic Health Record (EHR)** – The Alberta Electronic Health Record is a province-wide clinical health information system that links physicians, pharmacists, hospitals, home care and other providers across the province. The Alberta Electronic Health Record stores pertinent patient information online to allow health care providers to access a

patient's prescription history, allergies and laboratory tests immediately by computer.

**Electronic Medical Record (EMR)** – An electronic version of a patient's medical record that is used by healthcare practitioners to document, monitor and manage care delivery within a clinical practice and is owned by the primary physician. The data in the electronic medical record is the legal record of what happened to the patient during clinical encounters.

**Electronic Patient Record (EPR)** – An electronic medical record created and maintained by Alberta Health Services. This record is distinct from electronic medical records created by primary care providers or specialists. It is also distinct from the provincial electronic health record.

**Eligible Physician** – A physician who qualifies and has been accepted by the Physician Office System Program (POSP) for payment of fees through the reimbursement mechanism for the EMR solution and who maintains that qualification in accordance with POSP's agreement with the eligible physician.

**Invoice-Based Reimbursement** – The mechanism by which the Physician Office System Program (POSP) repays the physician for the program's defined portion of the contracted qualified service provider (QSP) pricing amount. The physician will be required to pay the full amount (100%) to the qualified service provider. The physician then submits invoices for eligible items to POSP. POSP will reimburse the physician for 70% of eligible invoiced costs as per program guidelines.

**Master Service Agreement (MSA)** – The written agreement between a vendor and Her Majesty the Queen (as represented by the Alberta Minister of Health and Wellness) under which a vendor who was successful in the competitive procurement process may provide defined services and materials as a qualified service provider.

**Milestones** – In the context of the Physician Office System Program, five defined points in time that mark progress or completion of a task, process or circumstance in the EMR implementation journey. During transition to a VCUR 2008 physician office system, milestones trigger vendor invoicing, followed

by physician invoice submission to the Physician Office System Program and POSP reimbursement to physicians.

**Peer to Peer Program** – In the context of the Physician Office System Program, a program that engages physicians, clinic managers, billing clerks and others in key clinic roles, to mentor others in similar roles in the use of electronic medical records.

**Portfolio Coordinator (PC)** – A Physician Office System Program employee/contractor that is a clinic's primary point of contact during physician office system implementation, responsible for monitoring the installation and implementation, and keeping the various tasks and responsible parties (the qualified service provider, the data migration provider, the Alberta Health and Wellness Netcare team, and Alberta Health Services labs and diagnostic imaging resources) on track.

**Primary Care Initiative (PCI)** – An initiative that supports and funds physician groups and the health authority in the creation of Primary Care Networks (PCN) to jointly provide comprehensive primary health care services to a defined population of patients, including linking patients to specialist services.

**Primary Care Network (PCN)** – A contractual arrangement between a participating group of physicians and Alberta Health Services acting together to provide defined primary care service responsibilities.

**Privacy Impact Assessment (PIA)** – A due diligence exercise, in which a custodian responsible for collecting, using and disclosing health information identifies, analyzes and addresses potential privacy risks that may occur in the course of its operations. PIAs assist custodians in reviewing the impact that new programs, systems and practices may have on individual patient privacy and ensure that changes are evaluated to be compliant with the *Health Information Act*.

**Record Retention** – The preservation of information stored in an electronic medical record to meet the following requirements:

- To allow physicians to complete the billing process for any patient activity that was entered into the existing physician office system before going live on the new solution.

- To retain all appropriate historical data in a form that meets medical legal and continuity of care requirements.

**Transition Allowance** – Direct financial support, negotiated as part of the 2008-2011 Trilateral Agreement, which is available to eligible physicians who are already using an electronic medical record (EMR) and who are transitioning in order to stay current with the Physician Office System Program by moving to a VCUR 2008 qualified service provider. It is one-time funding meant to partially recognize the temporary loss in productivity and the time investment that will accompany a transition to another EMR solution.

**Qualified Service Provider (QSP)** – A designation assigned to the three electronic medical record vendors selected through the Alberta Health and Wellness Request for Proposal—Physician Office System Program EMR Pre-Qualification that have completed build out and conformance testing as defined in the Master Services Agreement, as well as business pilots.

**VCUR 2006 Vendor (formerly Legacy Vendor)** – Physician office system vendors who provided Physician Office System Program eligible VCUR 2006 products but who did not become candidate service providers.

**VCUR 2008** – VCUR 2008 is the VCUR published as part of the Alberta Health and Wellness Request for Proposal—Physician Office System Program EMR Pre-Qualification on March 31, 2008.

**Vendor Conformance and Usability Requirements (VCUR)** – A set of functional, technical, security and privacy requirements developed through a process of stakeholder consultation led by the Physician Office System Program (POSP). Stakeholders include physicians, allied health workers, clinic managers and Alberta Health Services and Alberta Health and Wellness representatives. Physicians are required to select products that meet these requirements to be eligible for POSP funding. These requirements are reviewed periodically.

**From Choosing to Using Your Complete EMR Solution**

**May 13 and 14, 2010**

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