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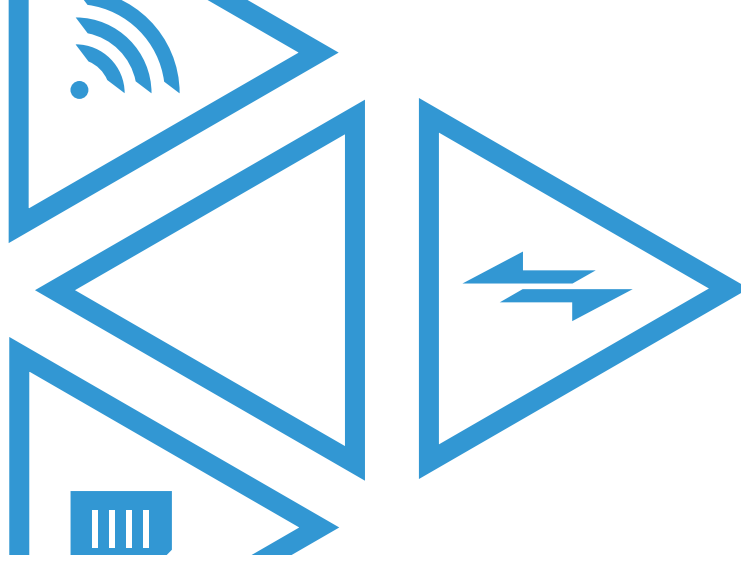
VOICE & SPEECH RECOGNITION
WORKFLOW TECHNOLOGIES
OUTSOURCED TRANSCRIPTION & CODING SERVICES



PATIENT #

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Implementation Methodology

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1 Introduction

MedQuist's Implementation and Professional Services (IPS) uses a proven, structured methodology, based on industry best practices, to manage each project from the initial phase through completion. This methodology ensures low risk and the ability to achieve reliable, positive, repeatable results that guarantee the highest level of client satisfaction.

Our methodology is specifically designed to integrate with any project. Regardless of project or team size, how we manage and what we manage does not vary significantly. ***This document stresses how to manage an implementation regardless of the type of work being performed.*** It can assist you in the planning process and it identifies the components inherent in a comprehensive plan.

With a history of many successful implementations, we know that client involvement and input is highly valuable throughout all phases of an implementation. At MedQuist, clients are an integral part of everything we do. Their involvement in the process allows us to truly understand their business needs, and to create a solution and customized ***Project Plan*** for each implementation.

IPS Implementation Teams follow a specific process that takes every aspect of the client's requirements into consideration. Beginning with the discovery process we provide detailed research and examination, consistent communication, quality control, testing, specialized training and professional configuration and installation.

Advantage Plus™ projects encompass multiple MedQuist solutions that support a client's entire clinical documentation process. Based on the client's medical records management needs, we perform current and future business analyses that are unique to Advantage Plus. During discovery, we carry out a detailed review of the business processes. The implementation of each MedQuist technology within Advantage Plus uses the same proven methodology our clients have come to count on.

Regardless of the solution, the MedQuist Implementation Methodology is used by each Implementation Team for all IPS managed projects.

1.1 Project Teams

Each MedQuist Implementation Team is staffed with a:

Role	Responsibility
Director	> Oversees the implementation projects within geographic area for assigned Project Managers and provides support when an issue needs to be escalated to another department.
Project Manager	> Fully responsible for the project. Creates a detailed Project Scope document and a detailed Project Plan, and is the primary contact during all stages of the implementation process.
Application Analyst	> Responsible for completing all analysis work and documentation during the implementation process.
Template Developer	> Responsible for building and testing the templates.
Interface Architect	> Responsible for working with appropriate team members to define and design the required interfaces.
Interface Developer	> Responsible for developing and testing the interfaces, engaging the client as appropriate.
Systems Engineer	> Responsible for installing and configuring the client's hardware.
Customer Care Manager	> Responsible for providing ongoing support following the implementation process; the primary client contact.
Client Instructor	> Delivers agreed upon learning material and sessions to prepare the client participants for Go Live and continued use of the system.
Speech Analyst	> Evaluates speech quality and qualifies dictators for eligibility for automated speech recognition.
Speech Implementation Analyst	> Implements eligible dictators into automated speech recognition.

1.2 Project Deliverables

Each phase of implementation includes a specific set of deliverables, enabling the project manager to clearly identify the transition from one phase to the next. The phases and associated management deliverables are:

Phase	Deliverable
Pre-Sales	<ul style="list-style-type: none"> > Discovery Questionnaire > Cost Estimation > Statement of Work > Contract/Purchase Order
Project Initiation	<ul style="list-style-type: none"> > Project Initiation Document > Preliminary Project Plan > Conference Call Schedule
Analysis and Design	<ul style="list-style-type: none"> > Project Scope Document > Project Plan > Interface Design
Execute Project	<ul style="list-style-type: none"> > Hardware Installation > Interface Build > Product Configuration > Test Plan > Unit Testing
Implement Project	<ul style="list-style-type: none"> > Full Life Cycle Testing > Training > Test Plan Acceptance > Go Live Acceptance
Close Project	<ul style="list-style-type: none"> > Client Project Acceptance > Technical Support Hand Off > Lessons Learned > Complete and Archive Projects > Documentation

2 Pre-Sales

2.1 The Role of Pre-Sales in the Implementation Process

Throughout the sales process, the sales team works closely with the client to discover and define their business challenges and determine the best potential solution for their organization. The information gained through this discovery process determines the type of solution that will best serve that client's needs. The team also assembles the solution parameters and hardware requirements for the proposed solution.

2.2 Statement of Work

The **Statement of Work** is an overall summary of the proposed solution, including hardware, software and configuration specifications. This information is documented by the sales team using input from the discovery process. A summary of the total implementation cost is delivered with the **Statement of Work**.

The creation and communication of this type of agreement is a key part of the implementation process. It defines the solution and associated deliverables, sets expectations and creates a level of confidence for the client. It also provides the client with the knowledge to understand the implementation process they are preparing to enter and the vital part they will play in the successful outcome of the implementation.

The **Statement of Work** is agreed upon by the client and MedQuist before the start of the implementation process. Additional third-party participants, who may play an integral role in the project, may also be required to agree on the **Statement of Work**.

The **Statement of Work** is divided into five areas of focus:

- > Solution Description;
- > Implementation Process;
- > Client Responsibilities;
- > Change Control; and
- > Acceptance.

Finalizing the **Statement of Work** completes the Pre-Sales phase of the implementation process. The requirements, costs and the project definition have been defined, and the completed document can be presented to the client. Representatives from MedQuist and the client sign off on the **Statement of Work**, indicating their approval of the document. The IPS Implementation Team begins the project after the contractual agreement is completed.

2.3 Flow of Information

The client data accumulated in the discovery process and documented in the **Statement of Work** is used throughout the phases of implementation. Once the client has engaged in the implementation process, IPS uses this information to:

- > Initiate the implementation process;
- > Communicate with the client and set expectations;
- > Analyze the client's current system and the proposed solution;
- > Create the **Project Scope Document**;
- > Create the **Project Plan**;
- > Build and configure the solution;
- > Perform quality assurance testing;
- > Provide client training;
- > Deliver the solution; and
- > Support the client.

3 Project Initiation

All projects begin with an internal project meeting attended by all MedQuist project team members. At this meeting, the sales team reviews the **Statement of Work** with the Implementation Team. The purpose of this meeting is to:

- > Define the scope of the project;
- > Clarify roles and responsibilities;
- > Identify deliverables and the tasks associated with them; and
- > Begin developing the timeline for the project.

The teams are typically structured as follows:

	Members	Responsibilities
Core Team	<ul style="list-style-type: none"> > Project Manager > Implementation Team > MedQuist Operations > Client Project Manager > Client IT Resources > Client Business Resources 	<ul style="list-style-type: none"> > Plan the tasks > Secure resources > Define requirements > Execute the plan > Produce deliverables
Steering Committee/ Guidance Team	<ul style="list-style-type: none"> > Regional Vice President > Client CIO/CTO > Sales Team > HIM Director 	<ul style="list-style-type: none"> > Resolve business and organizational issues > Assess/review status/deliverables > Approve team project plans/budget > Track high-level program events

The result of this internal review is the scheduling of the Project Initiation Meeting.

At the Project Initiation Meeting, the Project Manager introduces the client and MedQuist teams, reviews the **Project Initiation Document**, reviews the implementation process and establishes an ongoing conference call schedule.

The **Project Initiation Document** outlines project objectives, roles and responsibilities and deliverables. This document is reviewed during the initial meeting with the client, sales team and Implementation Team. It sets the project expectations and provides the transition from sales to implementation.

- > When implementing larger projects, a separate change control board may be created to facilitate processes such as issue resolution and change control.

4 Analysis and Design

During Analysis and Design, the client attends specialized classes to learn more about the solution that is being implemented. The Implementation Team defines, gathers and validates technical and business requirements, work flow, operational practices and hardware requirements. This information is analyzed to determine the optimal solution, resulting in the **Project Scope Document**.

The Implementation Team also determines exactly how the work will be done, what resources will be needed, and when interim and final units of work will be delivered. This information is included in the **Project Plan**, which is prepared in sections by the entire team, and then consolidated by the Project Manager.

4.1 Pre-Implementation Learning

The client team members benefit from understanding the functionality of the solution that is being implemented. This knowledge is important in decision making as it relates to the work flow, technical configuration and reporting. Pre-Implementation learning should be carried out at the beginning of the Analysis and Design phase in order to provide knowledgeable input to the IPS Implementation Team. The Project Manager will provide a recommended course schedule for the client.

4.1.1 Produce Project Scope

The Project Scope is the sum of the products and services to be provided within a project. It documents all goals, objectives and expectations of the project. While the entire Implementation Team participates in the creation of the **Project Scope Document**, the Project Manager is ultimately responsible for its completion.

It is imperative to have a complete understanding of the business requirements before proceeding with the development of the Project Scope. The Project Scope ensures that all parties understand the business requirements and how the solution meets those requirements.

4.1.2 Risk Analysis and Contingency

In order to meet the objectives and goals of the implementation project, a risk analysis is conducted to highlight points that may need special attention, understanding and direction. The objective of the risk analysis is to predict possible negative outcomes, develop contingency plans and thus minimize their impact on the project. The client and the Implementation Team review the potential problem areas and arrive at acceptable alternatives or solutions.

4.2 Produce Project Plan

The Project Manager produces a detailed work plan that documents the tasks required to perform all project-related activities. Using the information gained in the **Project Scope** document, the Project Manager identifies the phases, activities, steps, resources and deliverables needed to complete the implementation. The **Project Plan** also outlines the overall timeline for the implementation.

5 Execute Project

In the Execute Project phase, the Project Manager monitors the execution of all tasks described in the **Project Plan**. The Implementation Team completes the system development and configuration tasks.

During project execution, the Project Manager is responsible for the development of solution test plans and acceptance criteria. Standard test plans for a solution are provided, and then customized, based on modifications and enhancements to the solution. The test plan encompasses the complete workflow of the system, including error trapping and reporting.

5.1 Project Management and Reporting

Routine calls and status updates are held with the entire team and provide information regarding:

- > Tasks started;
- > Milestones and tasks completed;
- > Issues and decisions;
- > Change requests; and
- > Plans for the next reporting period.

In addition to regular project updates, scheduled executive project reviews are held with project sponsors, key executives from the client and MedQuist team.

Any deviations from the **Project Plan** require an acceptable solution, which must be agreed upon by the Project Manager and project stakeholders. The solutions may include, but are not limited to:

- > The addition of personnel;
- > Training for project staff;
- > Changes in project schedule; and/or
- > Changes in project scope (reduction of increases).

It is the responsibility of the Project Manager to implement the chosen solutions, and to adapt the project work plan to reflect those changes.

5.2 Development and Configuration

This segment of the Execute Project phase includes the majority of the configuration and software development tasks. The system is created as the Implementation Team members complete the tasks assigned to them in the **Project Plan**. They are responsible for activities such as:

- > Development of interfaces and templates;
- > Configuration of software;
- > Installation and configuration of hardware;
- > Procurement and validation of client information;
- > Voice configuration and quality verification;
- > Network configuration;
- > Security configuration;
- > Dictation cards; and
- > Unit testing.

6 Implement Project

During the Implementation phase, the Implementation Team works with the client preparing to take the solution live. Quality Assurance testing is completed, end user learning is conducted and the status of the project is reviewed.

6.1 Quality Assurance and Full Life Cycle Testing

Quality assurance activities are undertaken to ensure the quality of project management and project deliverables, as defined in the **Project Plan**. The objective of the Implementation Team is to produce defect-free deliverables, which conform to agreed upon quality criteria.

The earlier a defect is identified, the easier it is to fix. For these reasons, a regular management task is to provide ongoing quality checkpoints, which focus on the content of the deliverables and ensure adherence to standards, completeness and accuracy.

Adhering to the methodology and following the standard implementation processes allows the Implementation Team to complete a successful implementation with few, if any, issues.

6.1.1 Full Life Cycle Testing

Full life cycle testing is performed following specific procedures and the project test plan. Full life cycle testing mimics the entire work flow of the solution.

Testing is performed from module to system level, to completely assess the system. The Implementation Team and client work together throughout the testing segment. The client is required to review and accept the test results prior to Go Live.

6.1.2 Project Auditing

Quality Audits for project management process, interfaces, templates and configuration of software are performed throughout the phases of implementation before testing to ensure the highest quality and adherence to standards.

6.2 Go Live Preparation

Go Live preparation includes:

- > A review of any outstanding issues and resolution of those issues;
- > Completion of any regression testing due to defects found in the full life cycle testing;
- > Go/No-Go decision and an Executive Update;
- > Notification of Go Live to the client and MedQuist personnel;
- > Configuration Management Group build notification;
- > Site Scope monitoring notification; and
- > Review of the transition from implementation to technical support.

6.3 End User Learning

The MedQuist Learning Team provides educational opportunities designed to ensure that the client staff is prepared to use the new solution productively. Sessions consist of exercises that are aimed at qualifying the understanding of the participants. Training materials and instructional quick reference cards are provided to aid in the Go Live.

Learning opportunities are offered in a variety of formats, including:

- > On-site "Train-the-Trainer" sessions;
- > On-site end-user classes provided by a MedQuist Instructor; and
- > Learning sessions conducted via a live audio-visual, multimedia presentation.

6.4 Go Live

The Go Live transition to the new system is normally scheduled for execution on a Tuesday or a Wednesday, to ensure sufficient support for the implementation both from the client and MedQuist teams. MedQuist support personnel and members of the training staff are available during the Go Live process. The project is monitored closely by support staff after the successful Go Live, and then handed off to Technical Support.

7 Close Project

During the Close Project phase, the Implementation Team summarizes the events and compiles any issues and recommendations from the implementation. At the end of a project, the team evaluates the events that led to the implementation, reviews the positive occurrences, notes the areas where problems occurred, and documents the lessons learned in overcoming the problems.

Before a project is closed, the final deliverables must be reviewed with, and formally accepted by, the appropriate personnel. The support communication and process is reviewed with both MedQuist operations and the client to ensure a smooth transition.

7.1 Transition to Technical Support

All implementations are monitored by the IPS Implementation Team following Go Live. Client and project data used during the implementation is stored in a database for future technical support requirements.

System alerts for site monitoring are established. Customized programs created during the implementation, such as software, interfaces, architecture details, and client configuration information is archived, preserving the client's environment for ease of recovery.

Upon completion of the project, the Technical Support Center is notified. All project documentation is validated and the transition of the client from implementation to technical support is complete.

7.2 Client Satisfaction

Each implementation client is surveyed by an independent marketing firm to evaluate client satisfaction. This valuable input is compiled, reported and used to improve future services.

7.3 Project Review

A formal project review is scheduled with the Implementation Team and the Standards and Performance office upon the completion of every project. In addition to the normal format of the Project Review Report, additional items included are:

- > Measurement review of the project results against the original expectations;
- > Successful and unsuccessful elements of the project; and
- > Actions for process improvement on future projects.

The project review is generally scheduled within two weeks after the project is completed.

8 Conclusion

The MedQuist Implementation Methodology is designed to ensure worry-free implementations without setbacks or delays, and the highest level of satisfaction for clients who are implementing any MedQuist solution.

The Implementation Teams, using the best practices established within the methodology, provide clients with an understanding of the steps required to successfully implement their solution. Teams safely guide them through the implementation process, so that they may achieve their objectives.

