PHC Information Services Intake and Governance Process

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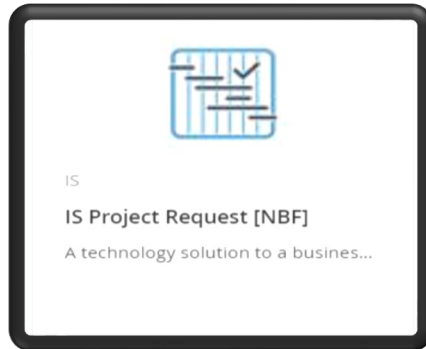
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IS Project Requests

Overview

IS Project Request Form

- Located in the IS Self Service Portal > Non-Break Fix menu
- Typically completed by department or service line leadership (manager and above.)
- Lists prerequisites that have to be met before submitting a project request:
  - Review by PHC advisory panel(s) or Clinical Governance Council to ensure the solution aligns with Piedmont standards
  - Committed funding
  - Support from a Piedmont Leadership Team member
- Includes links to helpful resources that clarify the PHC governance process.
- Provides contact information for IS Business Partners, who can help customers navigate the request submission and governance review process.

IS Intake and Triage

Process and Meeting Details

IS Intake and Triage

IS Project Request Process

REQUEST ▶ **REVIEW** ▶ **APPROVAL** ▶ **ASSIGNMENT**

Requestor:
- Review request with PLT representative.

- Enter IS Project Request into Ivanti, assign to IS Business Partner

IS Business Partner:
- Review Request

- Contact Requestor for additional details

- Add Request to the IS Intake Monthly Meeting agenda

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* This is our standard process, steps may vary based on many factors.

* Duration from Request to Assignment phase takes approx. 60 days.

IS Business Partner:
- Present Request in the monthly IS Intake Meeting

IS Intake Meeting:
Frequency: 1x per month
- Vets Request / Determine next steps:
  - **Service Request**, ready for assignment
  - **Service Request**, Oversight Committee approval needed. ISBP assists with prep
  - **Project**, Oversight Committee approval needed. ISBP assists with prep
  - **Project**, ready for PM Assignment
  - Hold for additional information or solutioning

IS Business Partner
- Assigns **Service Request** to the appropriate service line

Oversight Subcommittees
Frequency: 1x per month
- Approve **Service Request** or **Project**

- Deny Request

- Hold for additional information or solutioning

Approved Service Requests
- Request is assigned to an Analyst by the Service Line Manager

Approved Projects:
- Update Portfolio Status to :
  - Pending PM Assignment

  OR
  - Assigned

IS Intake and Triage

Purpose

Internal IS forum to perform intake and review of customer project requests that have IS components or impact.

Objectives

- Review Ivanti Project Request tickets to understand the customer request…**What is the situation**
- Determine **What is the request**…and how does it align to PHC strategy and priorities
- Assess **What are the options**… that take into account customer research, enterprise strategy and Governance
- Inventory and categorize the requests…**Where should the request be routed**
- Identify what additional elements are needed to define **What Next…** to follow up with the business owner
- Prepare a comprehensive package for the Oversight Committees…**Approval/Denial**

Audience

- IS Business Partner Team
- IS Project Management Team
- Information Security
- Technical Architect
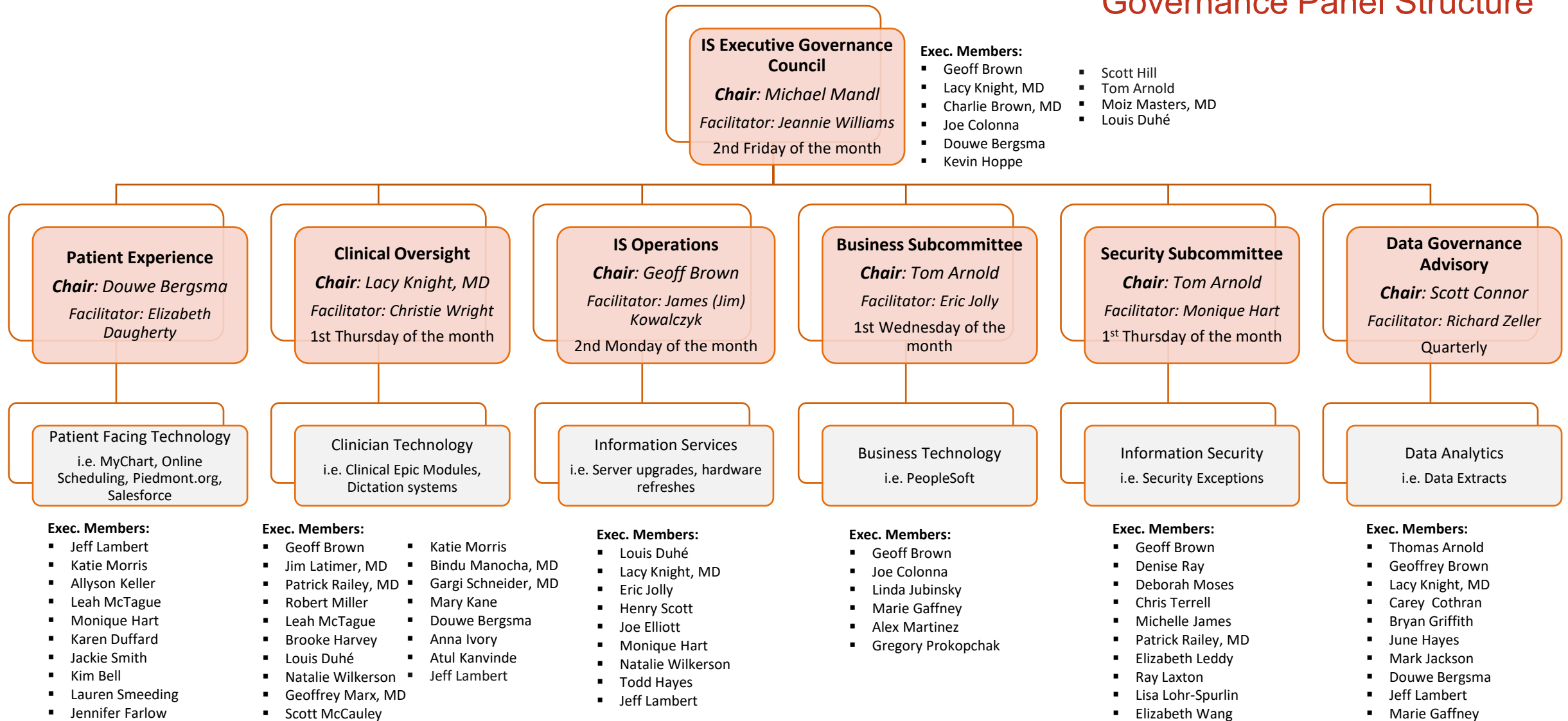- Technical Leadership
- Application Leadership

Frequency

- 1st Thursday of the Month

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IS Governance

Purpose, Structure, Details

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IS Intake and Governance
Governance Panel Structure

IS Executive Governance Council

Chair: Michael Mandl

Facilitator: Jeannie Williams

2nd Friday of the month

Exec. Members:
- Geoff Brown
- Lacy Knight, MD
- Charlie Brown, MD
- Joe Colonna
- Douwe Bergsma
- Kevin Hoppe
- Scott Hill
- Tom Arnold
- Moiz Masters, MD
- Louis Duhé

Patient Experience

Chair: Douwe Bergsma

Facilitator: Elizabeth Daugherty

Patient Facing Technology
i.e. MyChart, Online Scheduling, Piedmont.org, Salesforce

Exec. Members:
- Jeff Lambert
- Katie Morris
- Allyson Keller
- Leah McTague
- Monique Hart
- Karen Duffard
- Jackie Smith
- Kim Bell
- Lauren Smeeding
- Jennifer Farlow

Clinical Oversight

Chair: Lacy Knight, MD

Facilitator: Christie Wright

1st Thursday of the month

Clinician Technology
i.e. Clinical Epic Modules, Dictation systems

Exec. Members:
- Geoff Brown
- Jim Latimer, MD
- Patrick Railey, MD
- Robert Miller
- Leah McTague
- Brooke Harvey
- Louis Duhé
- Natalie Wilkerson
- Geoffrey Marx, MD
- Scott McCauley
- Katie Morris
- Bindu Manocha, MD
- Gargi Schneider, MD
- Mary Kane
- Douwe Bergsma
- Anna Ivory
- Atul Kanvinde
- Jeff Lambert

IS Operations

Chair: Geoff Brown

Facilitator: James (Jim) Kowalczyk

2nd Monday of the month

Information Services
i.e. Server upgrades, hardware refreshes

Exec. Members:
- Louis Duhé
- Lacy Knight, MD
- Eric Jolly
- Henry Scott
- Joe Elliott
- Monique Hart
- Natalie Wilkerson
- Todd Hayes
- Jeff Lambert

Business Subcommittee

Chair: Tom Arnold

Facilitator: Eric Jolly

1st Wednesday of the month

Business Technology
i.e. PeopleSoft

Exec. Members:
- Geoff Brown
- Joe Colonna
- Linda Jubinsky
- Marie Gaffney
- Alex Martinez
- Gregory Prokopchak

Security Subcommittee

Chair: Tom Arnold

Facilitator: Monique Hart

1st Thursday of the month

Information Security
i.e. Security Exceptions

Exec. Members:
- Geoff Brown
- Denise Ray
- Deborah Moses
- Chris Terrell
- Michelle James
- Patrick Railey, MD
- Elizabeth Leddy
- Ray Laxton
- Lisa Lohr-Spurlin
- Elizabeth Wang

Data Governance Advisory

Chair: Scott Connor

Facilitator: Richard Zeller

Quarterly

Data Analytics
i.e. Data Extracts

Exec. Members:
- Thomas Arnold
- Geoffrey Brown
- Lacy Knight, MD
- Carey Cothran
- Bryan Griffith
- June Hayes
- Mark Jackson
- Douwe Bergsma
- Jeff Lambert
- Marie Gaffney

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Purpose of IS Governance

- Ensure the effective and efficient use of IT and resources to enable Piedmont to achieve its strategic goals, aligned with Piedmont's Plan on a Page.

- Boost efficiency by defining a common IT vision and architecture for the organization.

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IS Governance: Approval vs. Awareness

IS Governance **Approval**

- New technology

- New equipment that will be added to the PHC network

- Adding new modules or functionality to existing technology

- New interface or integration requests

- May require funding

IS Governance **Awareness**

- Upgrades to existing technology

- Existing technology expansion to other facilities or care settings.

- Standard IS Construction and Move Projects

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IS Governance
Approval

Next Step:

- IS Business Partner preps the requestor for the business case presentation to the associated IS Governance Committee using the standard template.

- Governance will approve, deny, or defer the request in the committee meeting.

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IS Governance
Awareness

Next Steps:

- IS Governance will receive a report of new project requests for awareness via the monthly or quarterly IS PMO governance report.

- The request proceeds to the Service Line as a Service Request or to the IS Project Management Office for assignment as a project.

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Appendix

IS Intake and Governance Summary
Purpose, Objectives, and Cadence

	Initiation of Request	**IS Intake and Triage Meeting**	**Oversight Subcommittees & IS Executive Governance**
Purpose:	"The What and the Why"	"The How and the Who"	"The YES / NO and the When"
Frequency:	Ongoing	Monthly: 1st Thursday	Monthly – Business Oversight: 1st Wednesday of the month – Clinical Oversight: 1st Thursday of the month – Security Governance: 1st Thursday of the month – IS Operations: 2nd Monday of the month – Patient Experience: 2nd Thursday of the month – Data Governance: Quarterly – IS Executive Governance: 2nd Friday of the month
Participants:	• IS Business Partner • Business Owner / Requestor	• IS Business Partners • IS Project Management • IS Application Leadership • IS Technical Leadership • IS Information Security Leadership	• Committee Chairs • Committee Members • IS Leadership • IS Business Partners • Subject Matter Experts
Inputs:	• Discovery with the customer • Outline of business need	• Project Request	• Pre Planning Meeting • Executive Summaries / Business Case

Outputs:	• Project Request for IS Intake and Triage Meeting
	• Initiation of Technical Services Questionnaire (TSQ) and Risk Assessment
		• Project Vetting:
		  – Deemed a SR
		  – Deemed a Project
		  – Require Additional Info/Solutioning
		  – Prepped for Oversight Subcommittee
			• Discussion
			• Awareness
			• Request Approval, Denial, Deferment
			• Prioritization / Capacity Review

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