PHC Information Services
Intake and Governance Process

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IS Project Requests

Overview

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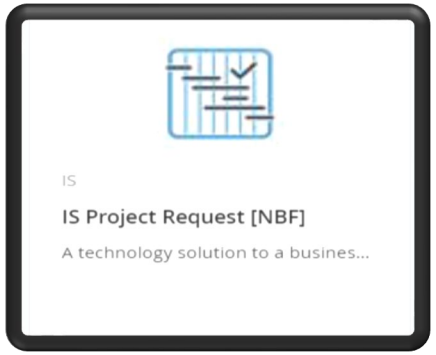
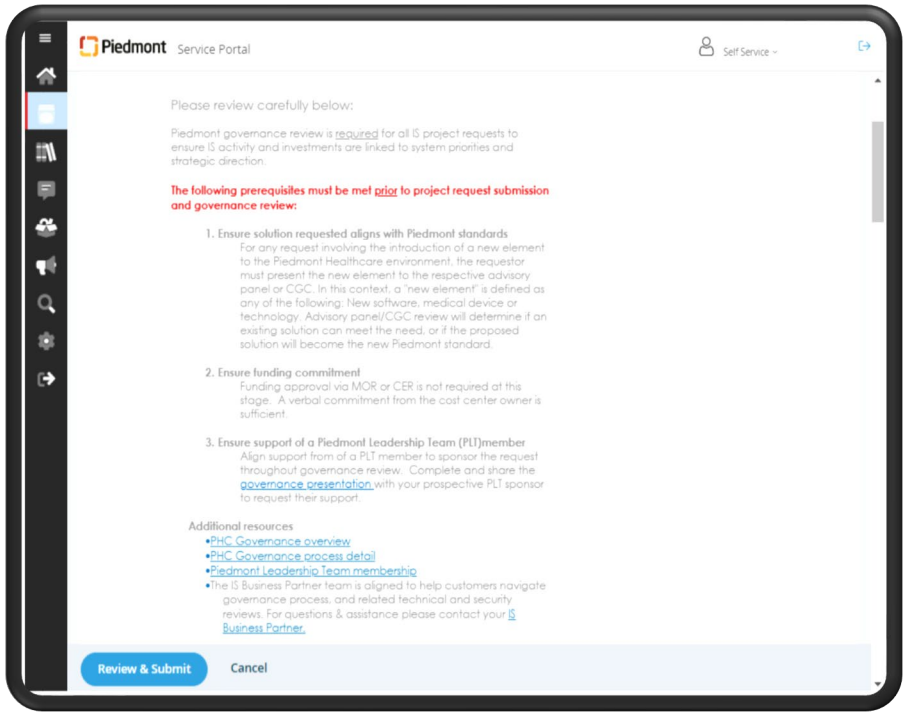
IS Project Request Form





- 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.

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IS Intake and Triage

Process and Meeting Details

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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

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

* This is our standard process, steps may vary based on many factors.
* Duration from Request to Assignment phase takes approx. 60 days.

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IS Intake and Triage

Meeting Details

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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