

Key Topics for Organizing and Governing Health Information Exchange Efforts

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Working Group for Getting Started, Organization and Governance

Co-Chairs

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- ◆ Jennifer Covich Bordenick, MS and Katie Sawyer, MPH

Working Group for Getting Started, Organization and Governance

Primary Purpose

- ◆ Conducting research, assessing and disseminating lessons learned, and developing strategies and guides to support the creation of organizations that will improve the quality, safety and efficiency of healthcare through health information technology and exchange in states, regions and communities across the U.S.

Business and Strategic Planning

- ◆ **WHO:** Finance folks, people with an operational background, physicians, hospitals, labs, payers, purchasers, communities (old and new)
- ◆ **WHAT:** Guide for the business and strategic planning process
- ◆ **DELIVERABLES:**
 - ❖ Process for determining portfolio of products and services
 - ❖ Road map for which functionality to take on first

Relationships with Governments

- ◆ **WHO:** Executive branch, state Medicaid programs, SCHIP, entitlement, public health, department of health, purchasers, department of corrections, CMS
- ◆ **WHAT:** Outline of possible roles of federal, state and local governments in the operation of HIE initiatives
- ◆ **DELIVERABLES**
 - ❖ Policy Documents
 - ❖ Coordination of state strategies
 - ❖ Catalog what is working

Communications

- ◆ **WHO:** Patient advocates/groups, provider associations, employer groups
- ◆ **WHAT:** Effective planning for communication during all phases of IHE/RHIO development
- ◆ **DELIVERABLES:**
 - ❖ Plan for stakeholder engagement
 - ❖ Media Kits
 - ❖ Press releases
 - ❖ Key messages
 - ❖ Providers, payers, legislators, public health, purchasers
 - ❖ Outline of communication plans
 - ❖ Crisis Communications plans

Organization Documents

- ◆ **WHO:** Legal team, Communities that have organized
- ◆ **WHAT:** How to conduct organization and governance decision-making
- ◆ **DELIVERABLES:**
 - ❖ Guidance document
 - ❖ Stakeholder guidance
 - ❖ Organizational document guidance
 - ❖ Business planning guidance

Tax Considerations for HIEs and RHIOs

- ◆ **WHO:** Legal and accounting teams, Communities about to submit applications
- ◆ **WHAT:** What you have to be to qualify for recognition as tax exemption. Create practical guidance for Communities
- ◆ **DELIVERABLES:**
 - ❖ Stakeholder guidance
 - ❖ Organizational document guidance
 - ❖ Business planning guidance

Procurement

- ◆ **WHO:** Vendors, communities, seasoned purchasers, IT consultants, CIOs, lawyers
- ◆ **WHAT:** Guide for procurement processes—creating the informed purchaser
- ◆ **DELIVERABLES:**
 - ❖ Methods for channeling vendor inquiries and interest to create productive relationships
 - ❖ Determining desired functionality
 - ❖ Handling the RFP process
 - ❖ Software license guidance
 - ❖ Maintenance agreement guidance

Human Resources

- ◆ **WHO:** Seasoned HIE folks, board members of HIEs, nuts and bolts management consultants
- ◆ **WHAT:** Guide for evolution of volunteer involvement; job descriptions for key staff; roles of consultants
- ◆ **DELIVERABLES:**
 - ❖ Case studies
 - ❖ Job descriptions geared toward stages of development
 - ❖ Ideal make up of boards
 - ❖ Role of staff vs board vs stakeholders
 - ❖ Volunteer management – how to manage and motivate volunteers through all phases of HIE development and channel their energies for productivity

