

Background

- These Physician Office System Program (POSP) Interim Guidelines describe the requirements for receiving POSP funding related to VCUR 2006 Electronic Medical Record (EMR) solutions. These guidelines will be effective until such time as the VCUR 2008 complete physician office system solutions are available.
- POSP is part of the tri-lateral agreement between Alberta Health and Wellness (AHW), the Alberta Medical Association (AMA) and Alberta Health Services (AHS). Funding under this program is currently in place through to March 31, 2011. This term may be shortened or extended at the sole discretion of the tri-lateral steering committee.

Interim Guidelines for Funding Eligibility

General Guidelines

1. The physician must be in good standing with the College of Physicians & Surgeons of Alberta.
2. The physician must meet eligibility requirements.
3. The physician must have completed a Privacy Impact Assessment and obtained acceptance by the Office of the Information and Privacy Commissioner (OIPC) by the time of go-live on the EMR solution.
4. The physician is required to meet usage outcomes currently outlined in the VCUR 2006 Letter of Agreement.
5. The physician is required to participate in periodic review meetings.
6. POSP funding will not be provided where the physician receives or otherwise benefits from funding or support for the VCUR 2006 EMR solution from other sources.
7. Change management support will be provided to physicians within the program.
8. These guidelines are related to VCUR 2006 EMR solutions only; therefore, no transition allowance is applicable.
9. POSP, at its discretion, may perform periodic audits to confirm:
 - a. Physicians are meeting the terms of their participation.
 - b. Financial information provided.
10. A qualified service provider as identified in these guidelines refers to an EMR solution provider who was selected through the 2008 POSP EMR Pre-Qualification Request for Proposal (RFP) and who has signed a Master Services Agreement (MSA) with Alberta Health and Wellness.

Physicians Currently Enrolled in POSP

11. Physicians currently enrolled in POSP must use a VCUR 2006 EMR solution.
12. These physicians will continue to be eligible for grant funding of \$740/month, until such time as POSP funding becomes contingent on using a VCUR 2008 physician office system solution.
13. Monthly grant funding ends when the physician signs a contract with a qualified service provider for a VCUR 2008 physician office system solution. This is referred to as Milestone 1 as defined in Schedule 7 of the Master Services Agreement (MSA).
14. Monthly grant funding will also end if the physician transitions to a new VCUR 2006 EMR solution as per the interim invoice-based reimbursement guidelines below.

Physicians Not Currently Enrolled in POSP Who Join an Existing Clinic

15. Physicians not currently enrolled in POSP who join an existing clinic whose physicians are part of the grant funding program can enrol in POSP provided the clinic uses a VCUR 2006 EMR and provided the physician commits to transition onto a VCUR 2008 physician office system solution within a reasonable time frame as defined by POSP.
16. These physicians are eligible for grant funding of \$740/month, until such time as POSP funding becomes contingent on using a VCUR 2008 physician office system solution.
17. Monthly grant funding ends when the physician signs a contract with a qualified service provider for a VCUR 2008 physician office system solution. This is referred to as Milestone 1 as defined in Schedule 7 of the Master Services Agreement (MSA).
18. Monthly grant funding will also end if the physician transitions to a new VCUR 2006 EMR solution as per the interim invoice-based reimbursement guidelines below.
19. The physician must complete required POSP documentation including but not limited to:
 - a. POSP Application Form
 - b. POSP Letter of Agreement
 - c. POSP Enrolment Form

Physicians Who Demonstrate a Compelling Need to Transition to a New VCUR 2006 EMR (Interim Invoice-Based Reimbursement Guidelines)

20. Physicians who demonstrate a compelling need to transition to a new EMR before all of the qualified service providers VCUR 2008 physician office system solutions have met POSP conformance requirements can, subject to POSP approval, transition to a new VCUR 2006 EMR provided:
 - a. The selected new VCUR 2006 EMR is from one of the qualified service providers.
 - b. The VCUR 2008 physician office system solution version from the selected qualified service provider has not yet met POSP conformance requirements.

21. At such date that the VCUR 2008 physician office system solution from the selected qualified service provider meets conformance:
 - a. Physicians who already have initiated the POSP Approved Project Plan for the new VCUR 2006 solution will continue be eligible for interim invoice-based reimbursement (Milestone 2 as defined in the "Administration Requirements for Interim Invoice-Based Reimbursement" section below).
 - b. Physicians who have not initiated the POSP Approved Project Plan will not be eligible for interim invoice-based reimbursement; however, these physicians will be considered a priority for transition to a new VCUR 2008 physician office system solution.
22. Potential compelling needs for transition include but are not limited to one of the following:
 - a. The existing EMR solution is not stable or reliable.
 - b. The physician(s) have set up a new clinic with a new physical location.
 - c. The EMR is for a large group with an urgent business need.
23. Physicians who transition under these terms are eligible for interim invoice-based reimbursement for the VCUR 2006 EMR, including 70% reimbursement of "one-time" cost invoices up to a maximum of \$14,000, and 70% reimbursement of monthly "recurring" cost invoices up to a maximum of \$438/month, until such time as POSP funding becomes contingent on using a VCUR 2008 physician office system solution.
24. Reimbursement is subject to the "Administration Requirements for Invoice-Based Reimbursement" as described within these Interim Guidelines.
25. Interim invoice-based reimbursement ends when the physician signs a contract with a qualified service provider for a VCUR 2008 physician office system solution. This is referred to as Milestone 1 as defined in Schedule 7 of the Master Services Agreement (MSA).
26. The EMR solution implemented must be as close to an Application Service Provider (ASP) delivery model as possible.
27. The physician must agree to transition to a VCUR 2008 physician office system solution within a reasonable timeframe as defined by POSP.
28. The physician must complete required POSP documentation including but not limited to:
 - a. POSP Application Form (if not already enrolled in POSP)
 - b. POSP Letter of Agreement
 - c. POSP Enrolment Form
29. The qualified service provider/physician agreement must be reviewed and approved by POSP prior to signing.
30. Physicians who use POSP to engage a data migration service provider to provide data migration services for transitioning from a VCUR 2006 EMR to a qualified service providers' VCUR 2006 EMR are eligible for one-time funding for these data migration services up to a maximum of \$7,500. Physicians who receive this one-time funding are not eligible for any additional data migration funding when transitioning to a VCUR 2008 physician office system solution.

31. Physicians who transition from a Rise/Purkinge EMR system to a new VCUR 2006 EMR will receive consideration from POSP for data migration funding on a case by case basis, with POSP determining one of two possible outcomes:
 - a. Funding will not be available from POSP for data migration.
 - b. POSP will provide funding up to a maximum of \$7500, provided the data migration resources are available.

32. Physicians not currently enrolled in POSP who join an existing clinic that has already completed implementation of a new VCUR 2006 EMR under this interim invoice-based reimbursement scenario are also eligible for these interim invoice-based reimbursement amounts.

Administration Requirements for Interim Invoice-Based Reimbursement

1. The qualified service provider/physician agreement must include a pricing template that comprises the following at a minimum (see “Sample Pricing Template” section of these Interim Guidelines):
 - a. A list of all eligible items to be delivered in the VCUR 2006 EMR solution (see “Eligible Items” section of these Interim Guidelines). Eligible items will be reviewed and approved by POSP during the contracting process.
 - b. A list of all additional items that will be delivered in the VCUR 2006 EMR solution that are not considered eligible for reimbursement to physicians (if any).
 - c. One-time costs for eligible items. This cost should be broken out into three cost categories (hardware, software, and services). Subtotals by cost category are required, but not the cost for each line item within the cost category.
 - d. One-time costs for additional items not eligible for POSP reimbursement to physicians (if any). Cost for each line item is required.
 - e. Monthly recurring costs for eligible items. The total monthly recurring cost is required, but not the cost for each line item.
 - f. Monthly recurring costs for additional items not eligible for POSP reimbursement to physicians (if any). Cost for each line item is required.
2. POSP will reimburse eligible physicians for 70% of each approved milestone invoice as outlined in the table below (for eligible items only).

Milestone	Description	Vendor Invoice Amount	Physician Reimbursement Amount (70%)	Timeframe
M1	Contract Signing	32% of One-Time Costs	No reimbursement	Contract Signing
M2	POSP Approved Project Plan	17% of One-Time Costs	49% of One-Time Costs	Within 60 days after M1
M3	Go-Live of EMR Solution	17% of One-Time Costs	17% of One-Time Costs	3 to 6 months after M1 (variable)
M4	Initial Implementation Status Review	17% of One-Time Costs	17% of One-Time Costs	60 days after M3
M5	End of Warranty Period (120 days after Go-Live)	17% of One-Time Costs	17% of One-Time Costs	120 days after M3
Recurring	Recurring Monthly Payments starting after M5, continuing until transition to VCUR 2008 physician office system solution begins.	Monthly Recurring Amount	Not to Exceed \$438/month	Ongoing until 5 years after M1

3. Reimbursement from POSP to the physician for milestone invoices will require:
 - a. A copy of the qualified service provider invoice that includes:
 - i. A list of the required eligible items for each milestone as it is achieved (eligible items as pre-defined for each milestone) including hardware, software, service, and usage-related outcomes achieved.
 - ii. Identification of the physicians who are participating in the EMR solution.
 - iii. Supporting documentation confirming satisfactory completion of deliverables that are required at each milestone as defined by the POSP Deployment Maintenance and Monitoring (DMM) methodology.
 - iv. Supporting documentation outlining eligible items that have been delivered at each milestone.
 - b. Confirmation from the physician/clinic of the physicians who are participating in the EMR solution.
 - c. Certification from the physician/clinic confirming completion of the deliverables required at each milestone as defined by the POSP DMM.
 - d. Certification from POSP confirming completion of the deliverables required at each milestone as defined by the POSP DMM.
 - e. Certification from POSP that each of the eligible items identified in the contract have been delivered. This certification of eligible items will take place at Milestone 4 and Milestone 5, and periodically for recurring payments.

Sample Pricing Template

The spreadsheet below outlines a sample pricing template which should be provided by the qualified service provider. The information in this sample represents the minimum information required for reimbursement by POSP to physicians. The pricing should be on a per physician unit basis, where a physician unit means the eligible physician plus three full time equivalents (which includes medical office assistants, nurses, and other staff members excluding medical trainees). General guidelines for eligible items are provided in the “Eligible Items” section of these Interim Guidelines.

Alberta Health and Wellness Physician Office System Program SAMPLE PRICING TEMPLATE Price Per Physician Unit		
Vendor Name:		Costs
Items	Description	Total Cost
Hardware	Eligible Item #1	
Hardware	Eligible Item #2	
Hardware	Eligible Item #N	
Hardware	Hardware One-Time Costs	\$ -
Software	Eligible Item #1	
Software	Eligible Item #2	
Software	Eligible Item #N	
Software	Software One-Time Costs	\$ -
Services	Eligible Item #1	
Services	Eligible Item #2	
Services	Eligible Item #N	
Services	Services - One Time Costs	\$ -
	SUB-TOTAL ONE-TIME COSTS (Eligible for Reimbursement)	\$ -
Additional Items	Item #1 - Not Eligible	\$ -
Additional Items	Item #2 - Not Eligible	\$ -
Additional Items	Item #N - Not Eligible	\$ -
	SUB-TOTAL ADDITIONAL ONE-TIME COSTS (Not Eligible for Reimbursement)	\$ -
	TOTAL ONE-TIME COSTS	\$ -
Recurring	Eligible Item #1 (monthly)	
Recurring	Eligible Item #2 (monthly)	
Recurring	Eligible Item #N (monthly)	
	SUB-TOTAL MONTHLY RECURRING COSTS (Eligible for Reimbursement)	\$ -
Add'l Recurring	Item #1 - Not Eligible (monthly)	
Add'l Recurring	Item #2 - Not Eligible (monthly)	
Add'l Recurring	Item #N - Not Eligible (monthly)	
	SUB-TOTAL MONTHLY RECURRING COSTS (Not Eligible for Reimbursement)	\$ -
	TOTAL MONTHLY RECURRING COSTS	\$ -

Eligible Items

This section provides a listing of the eligible items for the VCUR 2008 physician office system solutions as defined in the RFP and the Master Services Agreement. With respect to the interim VCUR 2006 EMR solutions, the list below will be used as a general guideline for identifying eligible items. POSP will review and provide acceptance of eligible items during the contracting process.

One-Time Cost Component 1 – Hardware

All hardware that is required to make complete and full use of the complete physician office system solution (whether provisioned from a data centre or as part of a community based solution).

Type	Description	Reference Documents
Server	Local Servers and Storage Devices; Office Class Fax Servers	RFP – Appendix O; MSA Schedule 10-2
Workstations	Workstation PCs, Laptop PCs, tablet PCs	RFP – Appendix O
Printers	Office Class Printers and Scanners	RFP – Appendix O; MSA Schedule 10-2
Tape Drives		RFP – Appendix O
Switches		RFP – Appendix O
Routers		RFP – Appendix O
Data Service Units / Modems		RFP – Appendix O
UPS	Uninterruptible Power Supplies	RFP – Appendix O; MSA Schedule 10-2
Security Access Devices	Local security or access devices	RFP – Appendix O; MSA Schedule 10-2
Tapes		RFP – Appendix O
CDs		RFP – Appendix O
Thin Client Device	Thin Client Device	MSA Schedule 10-2
LAN Devices	LAN Devices	MSA Schedule 10-2

One-Time Cost Component 2 – Software

All software that is required to make complete and full use of the complete physician office system solution (whether provisioned from a data centre or as part of a community based solution).

Type	Description	Reference Documents
Physician Office System Software Licenses	All SW licenses so as to permit use of the physician office system solution in a manner which meets or exceeds all core requirements	RFP – Appendix O; MSA Schedule 2, section 2
Operating System	All SW licenses so as to permit use of the physician office system solution in a manner which meets or exceeds all core requirements	RFP – Appendix O; MSA Schedule 2, section 2
Database Software	All SW licenses so as to permit use of the physician office system solution in a manner which meets or exceeds all core requirements	RFP – Appendix O; MSA Schedule 2, section 2
Office Automation SW licenses	All SW licenses so as to permit use of the physician office system solution in a manner which meets or exceeds all core requirements	RFP – Appendix O; MSA Schedule 2, section 2

One-Time Cost Component 3 – Services

All services that are required to complete the implementation, and that are required to make complete and full use of the complete physician office system solution (whether provisioned from a data centre or as part of a community based solution).

Type	Description	Reference Documents
Implementation Planning	Planning and Assessment – to prepare for the successful implementation of the complete physician office system; as defined in MSA Schedule 2 – section 3	RFP – Appendix O
Hardware / Network Planning	Including developing the list of Client Side HW, SW and office renovations (network and electrical wiring, power, furniture) needed to support the complete physician office system	RFP – Appendix O
Configuration Planning		RFP – Appendix O
Data Conversion, Analysis, Extraction and Loading		RFP – Appendix O
Workflow analysis and design		RFP – Appendix O
Implementation Support	In a manner which will meet or exceed all core requirements; as defined in Schedule 2, section 3 of the MSA	RFP – Appendix O
Hardware and Network Installation		RFP – Appendix O
Physician Office System Application Loading, Setup and Testing		RFP – Appendix O
Medical Devices Integration		RFP – Appendix O

Recurring Costs

All items that are required to support the ongoing operations of the complete physician office system solution, and that are required to make complete and full use of the complete physician office system solution on an ongoing basis (whether provisioned from a data centre or as part of a community based solution).

Type	Description	Reference Documents
Hardware Maintenance	Recurring maintenance to ensure the operation of all HW, equipment and SW	RFP – Appendix O
Physician Office System Software Maintenance	Continuance of all SW licenses and service of the physician office system Application; as per MSA Schedule 2, section 5	RFP – Appendix O
Office Automation SW Maintenance	As above	RFP – Appendix O
Release Planning, Implementation, Support and Training	MSA Schedule 2; section 5c <ul style="list-style-type: none"> - Development, testing, releasing and making generally available regular upgrades... - performance of training services - performance of user group services - co-ordination with the Province's other Health System architecture initiatives 	RFP – Appendix O
Helpdesk Level 1 Support	MSA Schedule 2; section 6; all calls and e-mails; may charge based on volumes	RFP – Appendix O
Helpdesk Level 2 and 3 Support	MSA Schedule 2; section 7; meet or exceed all expectations	RFP – Appendix O
Internal Service Provider		RFP – Appendix O
Data Centre Services	Ongoing support and maintenance of the Data Centre including support of data hosting and physician office system Application and Office Automation Application hosting and the Network Link	RFP – Appendix O

Recurring Costs - Continued

Type	Description	Reference Documents
Configuration Testing	Hardware and network installation, medical devices integration, physician office system Application loading, set-up and testing, back up testing; end-to-end configuration testing of the complete physician office system solution and data access from the Physician office for remote access	RFP – Appendix O
Disaster Planning		RFP – Appendix O
Back-up Testing		RFP – Appendix O
Initial Training	Provision of initial training that provides reasonable assurance that the eligible physician and other permitted users are able to use the complete physician office system solution successfully. As per MSA Schedule 2; section 4	RFP – Appendix O
Implementation Progress Review		RFP – Appendix O