

Requirements and Solution Definition for Facilities Engagement Management System (FEMS)

*Doctors of BC
SSC Facilities Engagement Initiative*

DRAFT

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1. Introduction

The *Facilities Engagement Web Application (FE)* will be a web-based information system that will provide the overall business management support and functions for the *Facilities Engagement Initiative*. The *FE Web Application* will collect and store project, initiative and sessional claims data in an electronic format. By doing this, it provides the ability to manage the workflow and business processes electronically for managing projects and paying sessional claims. It will also provide the ability to export accounting transaction data, and track physician feedback against projects.

Several key features of the FE Web Application itself are:

- Track, manage and report on Projects and Initiatives across the province and within individual incorporated Physician Societies (PS);
- Collect and process sessional claim information, such as effort incurred, travel time, related expenses, and session feedback;
- Provide workflow and status tracking of projects, initiatives and individual claims;
- Disburse the approved claim funds through the corresponding bank accounts to the individual physicians;
- Provide roll-up reporting to various levels for projects, initiative and sessional claims;
- Allow sessional claims to be reported while on-the-go using mobile Apps;
- Provide PS-level transaction data exports to support financial accounting within the individual PS's.

Some core benefits to the system include

1. Storing data electronically;
2. Paying claims electronically using Electronic Funds Transfer (EFT);
3. Automatically generating financial transactions for the PS accounting system;
4. Managing a standardized, centralized Chart of Accounts;
5. Providing electronic roll-up reporting.

The *FE Web Application* is a key component of the *Facilities Engagement Initiative* and as such is critical to the success and adoption of the overall program by physicians at the facility level.

2. Solution Overview

The Facilities Engagement initiative needs to support the following business activities:

- Identify and prioritise issues arising at facilities
- Address selected issues and track these through projects
- Support compensation of physicians for their time via sessional claims
- Gather evaluation feedback at different intervals.

The overall information flow can be illustrated as follows:

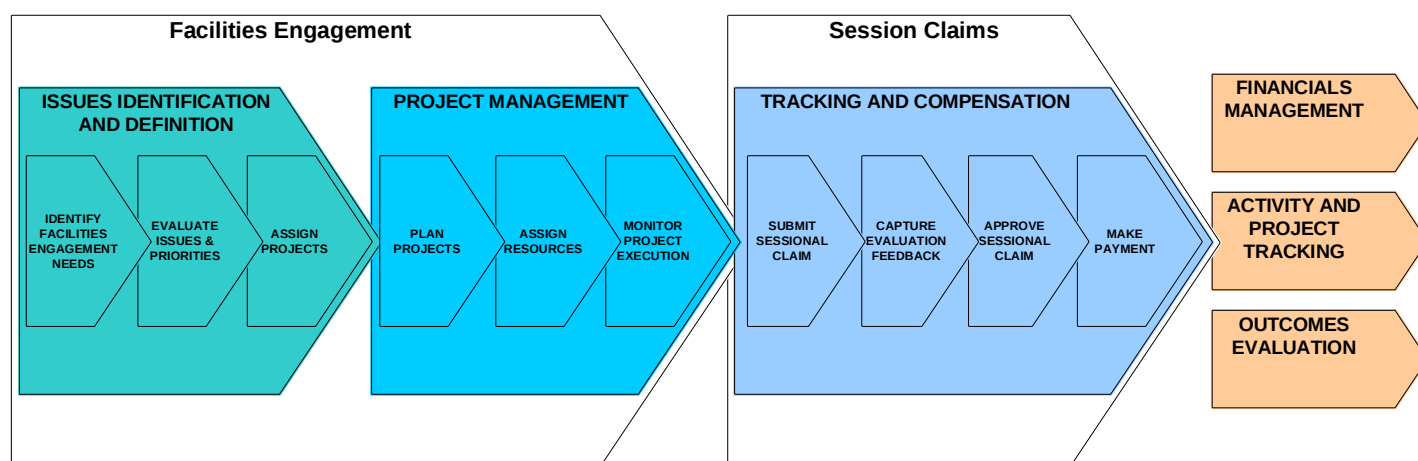


Figure 1: Facilities Engagement Information Flow

To support the above activities, a web-based Facilities Engagement application will be used by physicians, PS Administrators, PS Executives, and Doctors of BC staff. The diagram below illustrates the key components of the Facilities Engagement web application.

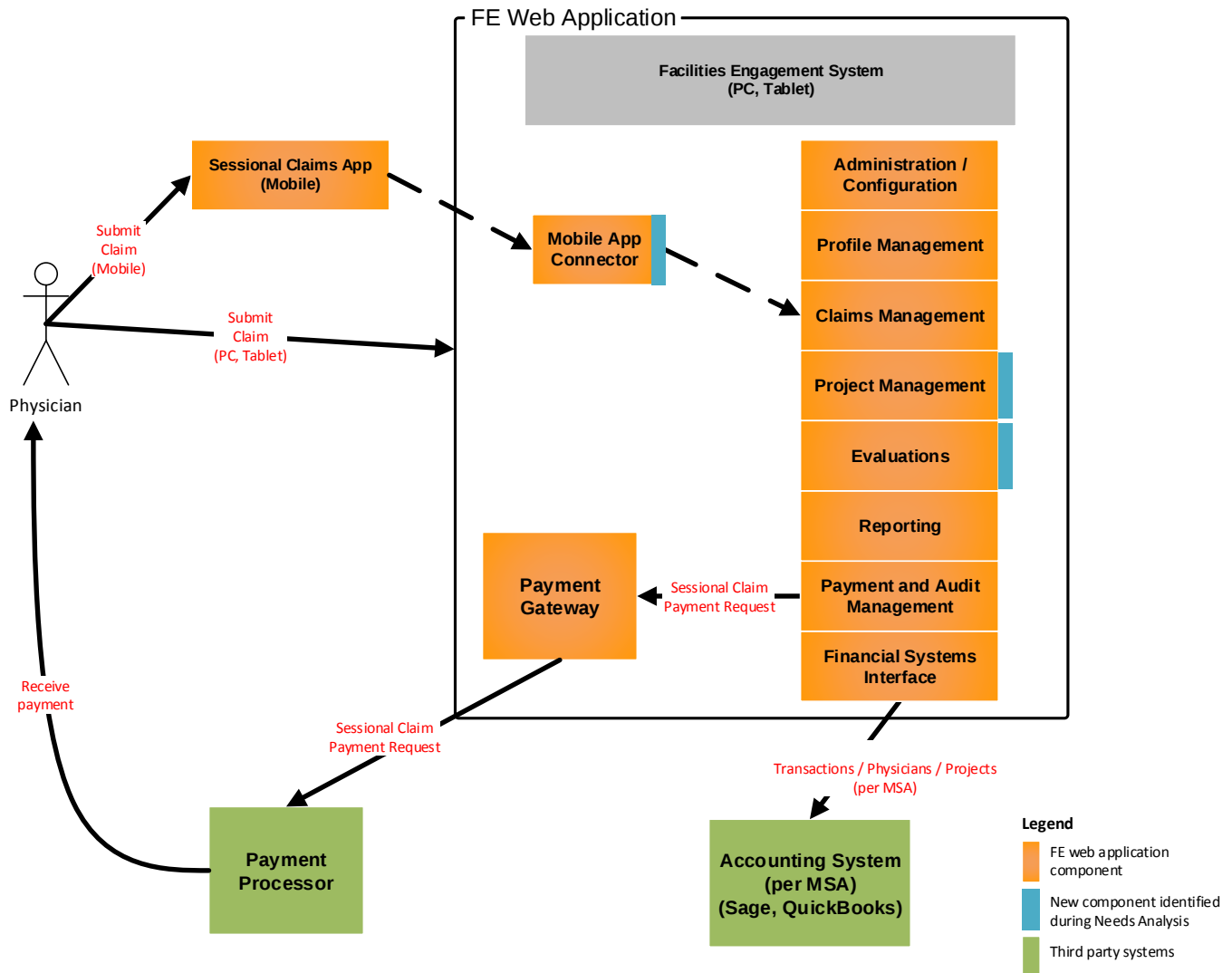


Figure 2: Proposed Systems Components for Facilities Engagement

Note that two new functional components and one technical component were identified during the Needs Analysis stage:

- Project management – define, manage and monitor projects per PS
- Evaluations – provide feedback capabilities at the Sessional Claim and Project level, as well as surveys across a defined audience (e.g. all BC physicians, all physicians within an PS who have not participated in any PS activities) – this will be supported by a third party survey platform
- Mobile app connector – facilitates the mobile experience on a range of mobile devices seamlessly by providing a mobile friendly front end user interface.

The following key capabilities were identified during interviews with physicians, Doctors of BC staff, health authority representatives, the evaluations team of Doctors of BC and UBC, and the accounting firm Manning Elliot. The table below lists the key capabilities required and provides a short description of each.

This is also represented in the diagram in *Figure 1: Facilities Engagement Information Flow* that follows the table. The detailed requirements are contained within the Appendix in section 19.

Key Functionality	Description
1. Administration / Configuration	Establish and configure characteristics of the operations (e.g. new PSs, user roles, evaluation requirements, sessional claim requirements)
2. Profile Management	Enables physicians to register, create a baseline profile, and specify preferences
3. Claims Management	Handle the capture, submission, and authorization of sessional claims and associated expenses
4. Sessional Claims App (Mobile)	Support the capture and submission of sessional claims and associated expenses; view claims status
5. Project Management	Create and manage projects within a PS. This provides an effective mechanism for the PS to assign budget and resources to achieve a specific goal.
6. Evaluations	Support the collection of feedback information at different levels: • Sessional claim (narrow focus) • Projects (broader focus) • Surveys for overall feedback on PS and Facilities Engagement activities The analysis of the feedback collected will be performed outside the FE web application.
7. Reporting	Provides a range of different reporting options for different audiences (e.g. physicians, project leads, PS Executives, Doctors of BC / SSC, Evaluations teams)
8. Payment and Audit Management	Manages the payment process for settlement of claims and incorporates features to identify exceptions.

Key Functionality	Description
9. Payment Gateway	A centralized component that manages the interface to the payment processor for the disbursement of funds for each PS.
10. Payment Processor	The financial organization that processes the payment requests generated by the FE web application and makes the disbursements.
11. Financial Systems Interface	Provides the integration to the individual PS's accounting system (which is necessary since the PS is an independent incorporated not-for-profit entity) – will help minimise the administrative and accounting overhead.
12. PS Accounting System	The commercially available accounting system that will be used by each PS to manage the PS's accounts. Since the PSs are incorporated not-for-profit organizations, there is likely to be Canada Revenue Agency reporting requirements as well as SSC reporting.

Table 1: Key Solution Components and Capabilities

The diagram overleaf (termed a *Capability Maturity Model*) illustrates these capabilities and features visually, and also the associated timing for delivery.

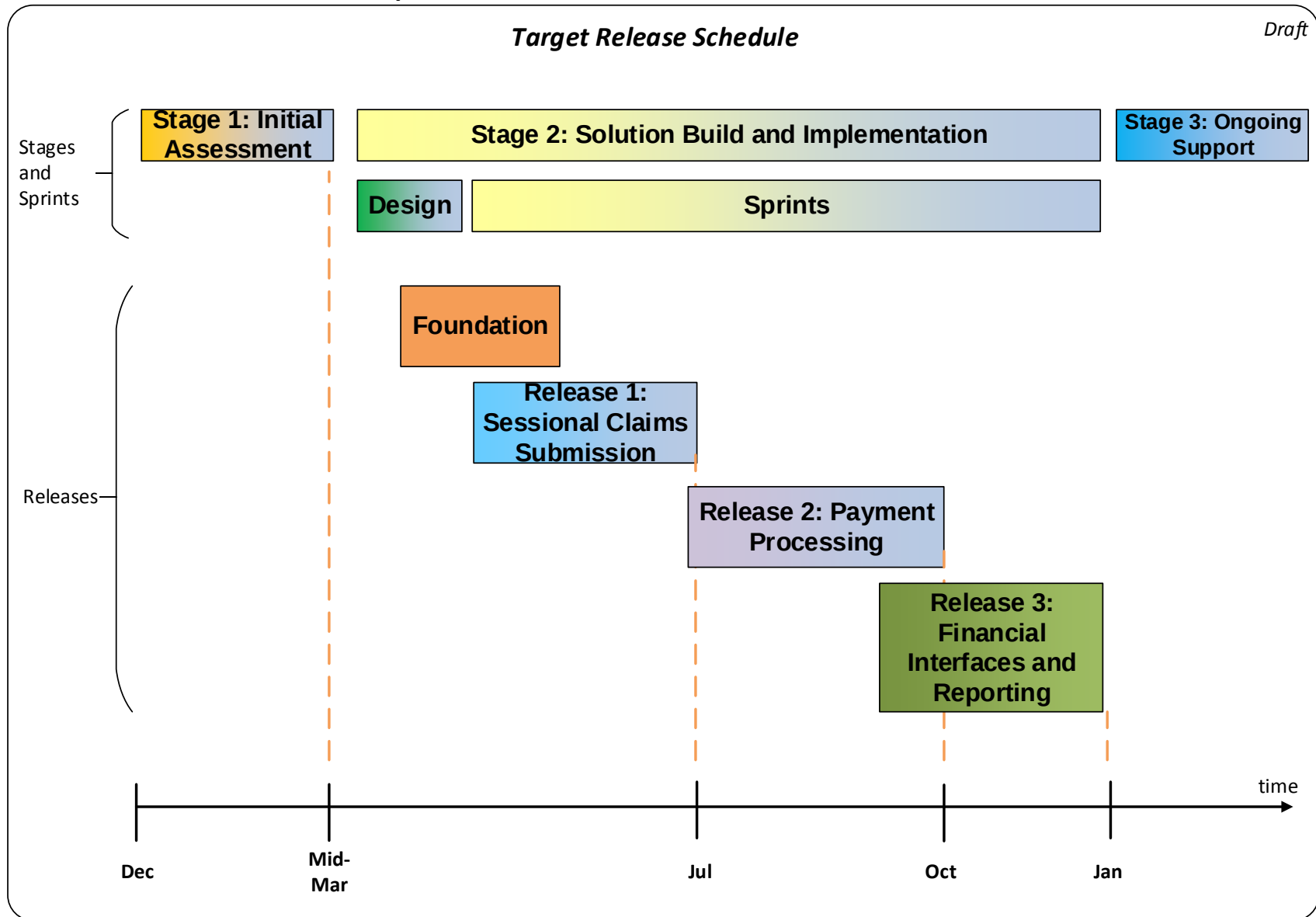


Figure 10: FE Target Releases Schedule