



Adult Echocardiography KB Configuration Plan

Contents

Introduction	2
Call 1: Introductions & Overview	2
Call 2: Study Type Selection	3
Call 3: Workflow Finalization.....	4
Call 4: “All Normal” Template Finalization.....	5
Call 5: Measurements and Calculations.....	6
Call 6: Findings and IAC.....	6
Call 7: Findings Finalization.....	7
Call 8: Superuser Training Prep.....	8
Call 9: Pre-Go Live Approval.....	9
Call 10: Advanced KBE Training.....	10
Call 11: Post-Go Live Check In	10

Introduction

This guide outlines the recommended steps to prepare the Adult Echocardiography Knowledge Base for your structured reporting go live. Each call is 45 minutes of action. Follow up tasks must be complete before moving to the next call.

Call 1: Introductions & Overview

Goal	Introduce team members, demonstrate Echo Report
Attendees	ASCEND Clinical Applications Specialist Client Superuser Client Physician Champion
Prerequisites	Client: Current State Review (CSR) Questionnaire complete ASCEND: Provide KBE access to client
Agenda	<ul style="list-style-type: none">• Introductions• Review of the KB configuration plan• Project Roles and Responsibilities• Knowledge Base Editor (KBE) introduction• How to log in• Demonstration of KBE features• Demonstration of Echo Report
Follow Up Tasks	ASCEND: <ul style="list-style-type: none">• Adjust start screen questions based on CSR and feedback Client Superuser: <ul style="list-style-type: none">• Log into KBE and review content• Place test KBE request

	<ul style="list-style-type: none"> Gather requirements for report headers for discussion (ex. demographics, patient status, indication, location, etc.) <p>Client Physician Champion:</p> <ul style="list-style-type: none"> Log into KBE and review content
Status	

Call 2: Study Type Selection

Goal	Select start screen questions, define header
Attendees	ASCEND Clinical Applications Specialist Client Superuser
Prerequisites	Call 1 Follow Up Items must be complete
Agenda	<ul style="list-style-type: none"> Review and approve start screen questions Review header requirements
Follow Up Tasks	<p>ASCEND:</p> <ul style="list-style-type: none"> Modify KB based on client decisions Set up report header <p>Client Superuser:</p> <ul style="list-style-type: none"> Log into KBE and approve modifications to start screen and report header. If edits are needed to start screen or header, submit KBE change requests
Status	

Call 3: Workflow Finalization

Goal	Finalize workflow, discuss “all normal” templates
Attendees	ASCEND Clinical Applications Specialist Client Superuser Client Physician Champion
Prerequisites	Call 2 Follow Up Items must be complete
Agenda	<ul style="list-style-type: none"> • Discuss and finalize tech workflow: entering findings or confirming demographics only, preliminary release, fellow workflow • Dictation and the structured report • Discuss study participants • Reporting by exception – begin with the “all normal” template
Follow Up Tasks	<p>ASCEND:</p> <ul style="list-style-type: none"> • Configure settings for agreed upon workflow <ul style="list-style-type: none"> ○ Amendment Settings ○ Study State Settings (to be read, for overread, preliminary) ○ Study Split Settings ○ Report Image Settings ○ Participant Roles • Modify Echo “all normal” template <p>Client Superuser:</p> <ul style="list-style-type: none"> • Log into KBE and review “all normal” template and enter change requests if necessary
Status	

Call 4: “All Normal” Template Finalization

Goal	Finalize “all normal” template, or default findings
Attendees	ASCEND Clinical Applications Specialist Client Superuser
Prerequisites	Call 3 Follow Up Items must be complete
Agenda	<ul style="list-style-type: none"> • Complete review of the all normal template by walking through each piece of anatomy
Follow Up Tasks	<p>ASCEND:</p> <ul style="list-style-type: none"> • Modify Echo “all normal” template <p>Client:</p> <ul style="list-style-type: none"> • Log into KBE and review and approve “all normal” template • Prepare a list of required measurements by study type <p>Physician Champion:</p> <ul style="list-style-type: none"> • Log into KBE and approve the “all normal” template, start screen questions, report header
Status	

Call 5: Measurements and Calculations

Goal	Finalize measurements and calculations
Attendees	ASCEND Clinical Applications Specialist Client Superuser Client Physician Champion
Prerequisites	Call 4 Follow Up Items must be complete
Agenda	<ul style="list-style-type: none"> • Review measurements, decide which should be displayed on the report • Auto summary of measurements • Auto summary of findings
Follow Up Tasks	<p>ASCEND:</p> <ul style="list-style-type: none"> • Build DICOM study snapshot for client review and testing <p>Client:</p> <ul style="list-style-type: none"> • Log into KBE and review measurements, enter change requests if necessary
Status	

Call 6: Findings and IAC

Goal	Review findings and IAC features
Attendees	ASCEND Clinical Applications Specialist Client Superuser

Prerequisites	Call 5 Follow Up Items must be complete
Agenda	<ul style="list-style-type: none"> • Review signatures • Urgent and critical findings • Teaching case categorization • Candidate IAC study identification • Minor abnormalities tab discussion, if applicable
Follow Up Tasks	<p>ASCEND:</p> <ul style="list-style-type: none"> • Modify KB findings <p>Client:</p> <ul style="list-style-type: none"> • Log into KBE and review findings • Enter change requests for any findings
Status	

Call 7: Findings Finalization

Note: This call is a prerequisite to Integrated Testing.

Goal	Approve the KB content for Integrated Testing
Attendees	<p>ASCEND Clinical Applications Specialist</p> <p>Client Superuser</p> <p>Client Physician Champion</p>
Prerequisites	Call 6 Follow Up Items must be complete

Agenda	<ul style="list-style-type: none"> Review KB content
Follow Up Tasks	<p>Client Physician Champion:</p> <ul style="list-style-type: none"> Log into KBE and approve the findings and measurements
Status	

Call 8: Superuser Training Prep

Note: This call is a prerequisite to Superuser Training.

Goal	Complete hands-on preparation for the reporting portion of Superuser Training
Attendees	<p>ASCEND Clinical Applications Specialist</p> <p>ASCEND Technical Specialist</p> <p>Client Superuser</p>
Prerequisites	<p>Connectivity testing complete</p> <p>Integrated testing started</p> <p>Access to test patients in the Test System</p>
Agenda	<ul style="list-style-type: none"> Discuss Superuser training event Hands-on activity for Superuser to practice report building with ASCEND's support
Follow Up Tasks	<p>Client Superuser:</p> <ul style="list-style-type: none"> Continue practicing end to end workflow Review KB in KBE to ensure it's ready for final Physician approval

Status	
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Call 9: Pre-Go Live Approval

Note: This call is a prerequisite to go live.

Goal	Approve report for go live
Attendees	ASCEND Clinical Applications Specialist Client Superuser Client Physician Champion
Prerequisites	Call 8 Follow Up Items must be complete
Agenda	<ul style="list-style-type: none"> • Final review and approval of Echo report for production • Change control process
Follow Up Tasks	<p>Client Superuser:</p> <ul style="list-style-type: none"> • Define and distribute KB change control process <p>Client Physician Champion:</p> <ul style="list-style-type: none"> • Provide email approval to move to production
Status	

Call 10: Advanced KBE Training

Goal	Train the client superusers to use KBE to edit and maintain the report
Attendees	ASCEND Clinical Applications Specialist Client Superuser
Prerequisites	Client Superuser determines who will be trained to maintain reports after go live using KBE. ASCEND will grant KBE access to participants.
Agenda	<ul style="list-style-type: none"> • Advanced KBE Training <ul style="list-style-type: none"> ○ Roles and privileges ○ Search content ○ Add new content ○ Editing and populating tabs using drop targets
Follow Up Tasks	ASCEND: <ul style="list-style-type: none"> • Distribute KBE training documentation Client Superuser: <ul style="list-style-type: none"> • Complete KBE practice test • Make changes to the KB, if desired
Status	

Call 11: Post-Go Live Check In

Note: This call is scheduled for 4 weeks after go live.

Goal	Project closure
Attendees	ASCEND Clinical Applications Specialist Client Superuser Client Physician Champion
Prerequisites	Go Live KBE training
Agenda	<ul style="list-style-type: none"> • Review usage patterns and ASCEND suggested changes • Review client questions and requests • Transition to support • Project closure
Follow Up Tasks	<p>ASCEND:</p> <ul style="list-style-type: none"> • Final KB changes <p>Client Superuser:</p> <ul style="list-style-type: none"> • Complete suggested KBE changes
Status	



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