Contents

Introduction

This document describes PHASER site deployment organization. It assumes the site has successfully completed their PHASER dry run and have a fully staffed PHASER core project team composed of a **Site Champion**, **Pharmacy Site Champion**, and a full time **Site Coordinator** dedicated to PHASER. It does not include operational activity such as auditing PGx Health Factors and processing PGx results from Sanford Health Labs.   Other forms of project organization are possible, such as PHASER self-deployment or deployment without a Pharmacy Site Champion, but those alternatives are not discussed in this document.

Project Approach

The project approach documented in following sections is a distillation of experience gained during the implementation of PHASER at six VA location in 2019. It incorporates four primary lessons learned during that time.

1. Provide a structured deployment approach that incorporates basic project management principles. Examples are the lists of deliverables, project measurements, and the reporting structure discussed in following sections.

2. Fund a full time PHASER Site Coordinator. The Site Coordinator has several important responsibilities, including managing the entry of PGx results in VistA/CPRS, managing and reporting on the PHASER deployment project, and supporting the Site Champion and Pharmacy Site Champion in their education and outreach efforts. This full-time position provides a much-needed resource to help ensure project success.

3. Incorporate Pharmacy.   Pharmacists play a vital role in medication management, a key aspect of the clinical application of pharmacogenomic test results.   Experience shows that incorporating a Pharmacy Champion in the core PHASER team significantly increases the effectiveness of education and outreach efforts.

4. Provide training and support for the local PHASER team. Items shown in blue text in **Figure 1- PHASER Site Project Overview** below are activities in which the PHASER Project Office and the core site project work closely to prepare for and manage PHASER deployment activity.
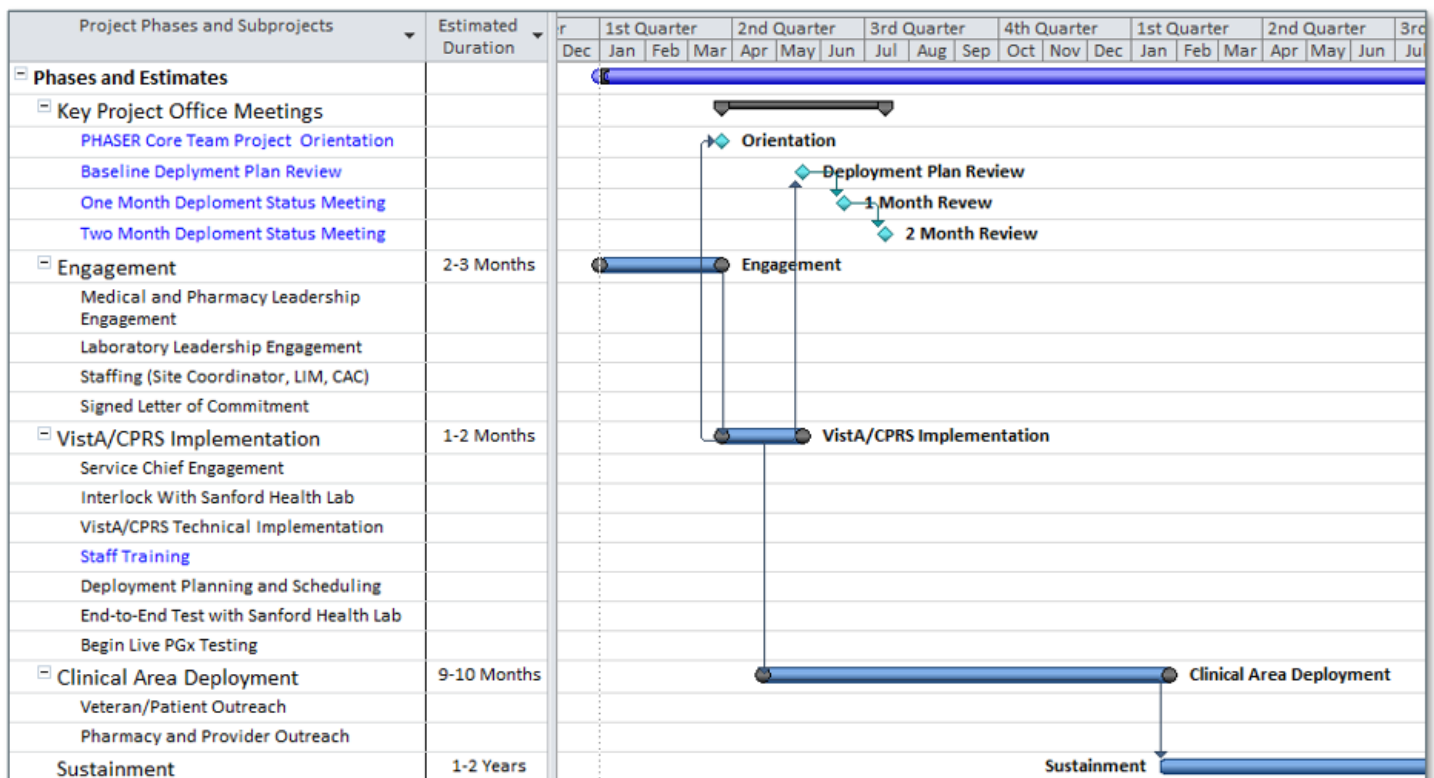

Figure 1- PHASER Site Project Overview

Primary PHASER Project Goals

These are purely non-clinical project goals without regard for the effects of pharmacogenomic testing on Veteran health or medication management.

Goal	Related Project
Implementation of all PHASER application processes and elements, such as the use of the VistA/CPRS reminder dialog for documenting patient consent and ordering the PGx lab test, CPRS postings, the Interfacility Consult, and CROC's (when available).	PHASER Site Deployment Project
An integrated PHASER deployment plan for a VA PHASER site that includes all project milestones related to clinic, Pharmacy, Veteran outreach, and all other aspects of PHASER deployment.	PHASER Site Deployment Project
A Site Coordinator qualified to consent patients for testing and place orders for provider approval in VistA/CPRS	PHASER Implementation Phase
Clinical Pharmacy Specialist (CPS) staff are familiar with PGx testing, able to advocate with providers and apply results for medication management.	CPS Pharmacy Deployment
Pharmacogenomic testing at each clinic selected for deployment self-sustains following completion of clinic-level deployment without routine involvement of the core PHASER team (Site Champion, Site Pharmacy Champion, and Site Coordinator)	PHASER Clinic Deployment Project - Transition to Sustainment
Pharmacogenomic testing at the VA location self-sustains following completion of the site PHASER project without routine involvement of the core PHASER team (Site Champion, Site Pharmacy Champion, and Site Coordinator)	PHASER Site Deployment Project - Transition to Sustainment

Assumptions

1. The Site Coordinator and other staff designated by the Site Champion will complete the Clinical Coordinator Competency checklist and be authorized to contact patients by phone or in person to obtain their consent for PGx testing. They may also be authorized to place the lab order for review and approval by a participating provider.

2. If requested by a provider at the site, the PHASER Project Office will provide a weekly report of patients who are candidates for receiving a pre-appointment mailing of PHASER patient education material. The local PHASER team is responsible for printing and mailing the education material.

3. The Project Office will provide training material, templates, and other information required to train staff or educate patients. The local PHASER team tailors this material as needed.

4. The Site Coordinator will submit a monthly project status report during the first full week of every month to the Site Champion, Pharmacy Site Champion, and PHASER Project Office listing accomplishments for the month, plans for the following month, and any issues affecting PHASER deployment. It will include a project milestone list. See (add appendix X for milestone standards).

5. See **Appendix A – PHASER Site Measurements** on page 10 for measurements that will be used to gauge project progress and assess performance.

Project Organization

The Site Coordinator is the overall project manager for PHASER implementation and is responsible for working with the Site Champion and Pharmacy Site Champion to create, manage, and report on the overall site PHASER deployment plan. In addition, the Site Coordinator is responsible for processing test results returned by Sanford Health, serving as the central point of contact for the lab and other staff, and managing any deployment activity outside the scope of the Pharmacy or clinic subprojects, such as direct outreach efforts to Veterans through social media.
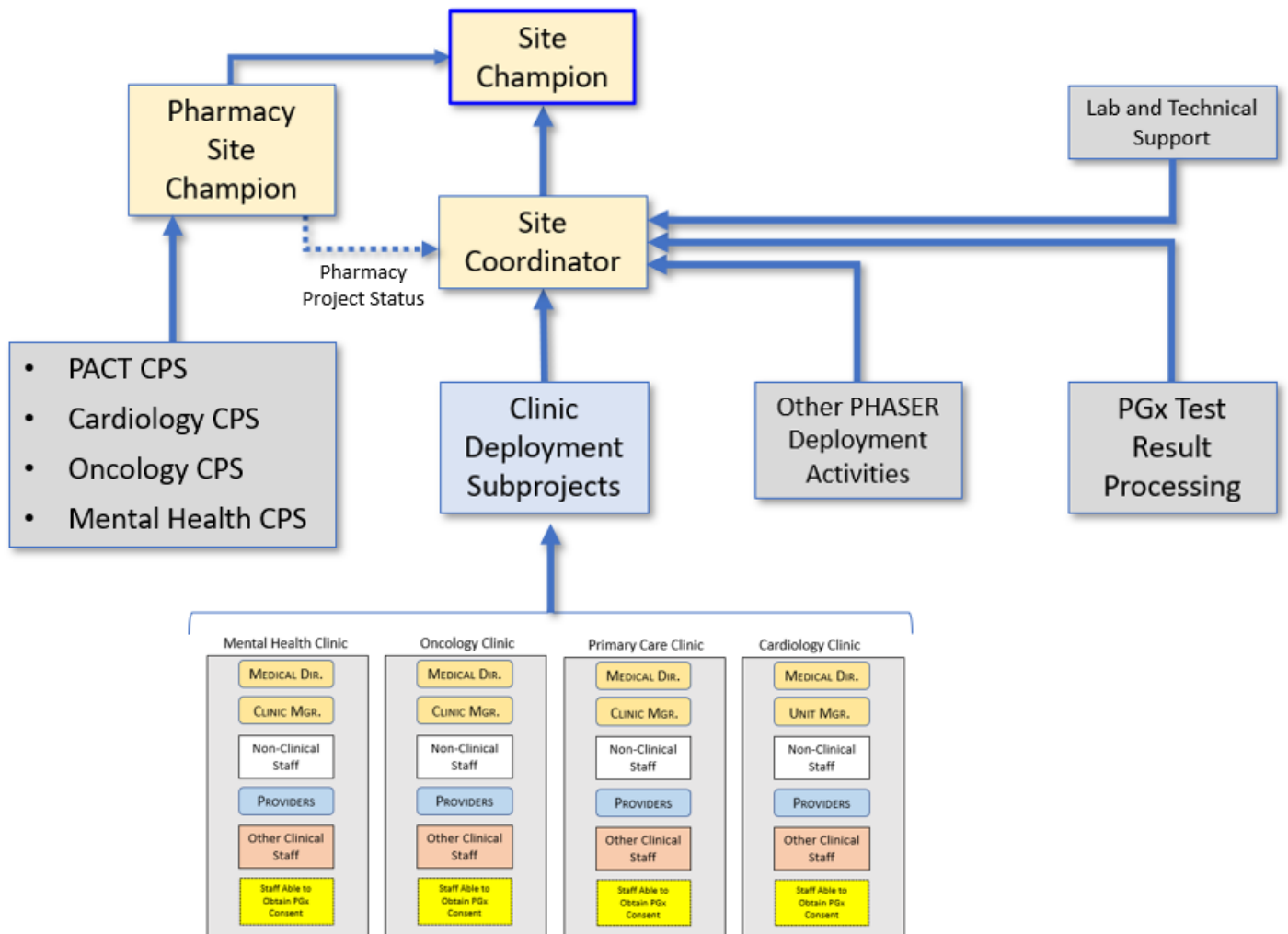

Figure 2 - PHASER Site Project Organization

PHASER Project Office Deliverables

This list does not include the brochures, templates, and other documents stored on the PHASER SharePoint site (http://go.va.gov/npub), nor does it include deliverables related to a site's PHASER implementation phase, such as the copy of the PHASER reminder dialog provided to the site CAC. See the PHASER Implementation Guide on the SharePoint site for details.

Name	Owner	Comment
Clinical Coordinator Competency Checklist	Project Office	A checklist of skills and abilities which, once completed by a staff member and approved by a Site Champion, enable the staff member to obtain patient consent for PGx testing and optionally place a PGx lab order for a participating provider.
Deployment Plan Template and Milestone Standards	Project Office	Provided at the PHASER Project Orientation Meeting.
Monthly PGx Order and Result Audit Report	Project Office	Provided monthly as soon as data is available following go-live.
Monthly Status Report Template	Project Office	Provided at the PHASER Project Orientation Meeting.
PGx Test Results from Sanford Health	Project Office	Provided as soon as PGx test results arrive from Sanford Health.
PHASER Application Training	Project Office	Scheduled to occur during the PHASER implementation phase for the site core project team.
PHASER Project Orientation Meeting	Project Office	Conducted prior to start of PHASER application implementation at a given VA location.
Weekly Corporate Data Warehouse (CDW) PGx Order Report	Project Office	Provided weekly as soon as data is available following go-live.

PHASER Site Project Deliverables

These are site-level deliverables that encompass all deployment activities at a given VA PHASER site.

Name	Owner	Comment
Baseline Deployment Plan Review	Site Champion	Review of baseline deployment plan with the PHASER Project Office scheduled to occur before the site go-live date for PGx testing.
Completed Clinical Coordinator Competency Checklists	Site Champion	Copies of competency checklist approved by the Site Champion must be kept for audit purposes.
Monthly PHASER Status Report	Site Champion	Monthly PHASER status report compiled by the Site Coordinator and delivered to the Site Champion for review along with a copy to the PHASER Project Office. Due by the end of the first full week of every month.
One Month Deployment Status Meeting	Site Champion	Review of updated deployment plan with the PHASER Project Office scheduled to occur one month after the site go-live date for PGx testing.
Site PHASER Deployment Plan	Site Champion	The integrated PHASER deployment plan for the site that includes all project milestones related to clinic, Pharmacy, Veteran outreach, and all other aspects of PHASER deployment.
Two Month Deployment Status Meeting	Site Champion	Review of updated deployment plan with the PHASER Project Office scheduled to occur one month after the previous review session. A decision regarding future deployment status reviews will be made at this meeting.

Clinic Subproject Deliverables

These are deliverables related to deployment at a given clinic. In practice deliverables will be shared or reused across clinics.

Name	Owner	Comment
Clinic Deployment Kickoff Presentation	Site Champion	Template tailored for clinical specialties provided by Project Office. Audience is clinic leadership and providers.
Clinic Deployment plan	Site Coordinator	Subproject plan that includes tasks and dates specific to a given clinic.
Clinic Organization Chart	Site Coordinator	Clinic leadership and key stakeholders.
Clinic Shadow Notes	Site Coordinator	The Site Coordinator will shadow clinic staff to assess how best to introduce PHASER. This includes determining how blood specimens are drawn and sent to lab.
Communication Plan	Site Coordinator	Key elements: • Communicate the training schedule to providers. • Inform provider and non-provider staff about PHASER. • Communicate monthly status to clinic leadership. • Communicate monthly status to the PHASER Project Office. • Maintain clinic presence by rounding and providing at-the-elbow support when needed.
Issue List	Site Coordinator	Identify and manage issues as they occur. Included in the monthly status report.
Leadership Commitment	Site Champion	Communications supporting PHASER deployment sent to staff by a Service Chief, clinic Medical Director, and clinic Manager.
Monthly Subproject Status Report	Site Coordinator	List of accomplishments, plans, and issues sent to clinic leadership and stakeholders. Included in monthly site status report to the Project Office.
Non-Provider Staff List	Site Coordinator	People who will need to be familiarized with the PHASER program, such as admission staff, nursing staff and phlebotomists.
Pharmacy Plan Interlock	Site Coordinator	Coordinate with Site Pharmacy Champion so plans for CPS and provider education and HIPP contact are complementary.
Pre-Appointment Mail	Site Coordinator	PHASER patient education material.
Pre-Appointment Mailing Lists	Project Office	Excel workbook updated weekly by Project Office.
Project Document Repository	Site Coordinator	Location for documents such as the deployment plan, meeting agendas and minutes, CPS list, HIPP report, etc. Shared by Site Pharmacy Champion.
Promotional Material Distributed to Clinic	Site Coordinator	Post-it notes, Quick Guides, patient brochures, and other information provided by to the Site Coordinator by the PHASER Project Office to promote PHASER awareness.
Provider List	Site Coordinator	Provider list for PHASER training and other communications.
Provider Training Attendance Sheets	Site Champion	Send copies to the Project Office.
Provider Training Material	Site Champion	Template provided by Project Office and tailored as needed by the site PHASER team..
Provider Training Plan	Site Champion	Training schedule for providers.

Pharmacy Subproject Deliverables

These deliverables are unique to work conducted by the Pharmacy Site Champion. In practice, deliverables may be shared with clinic deployment, and Pharmacy deployment activity will be coordinated with PHASER deployment work planned for clinics. The Pharmacy Site Champion will develop and maintain a subproject milestone plan that they will provide to the Site Coordinator for inclusion in the monthly site status report.

Name	Owner	Comment
Communication Plan	Pharmacy Site Champion	Key elements: • Inform all pharmacy staff about PHASER • Communicate training schedules to facility pharmacy staff • Communicate status to facility Pharmacy leadership • Serve as the facility's PGx subject matter expert • Co-Chair the overall facility PHASER committee • Communicate with and provide documentation to the national PHASER pharmacy program manager • Submit pharmacy monthly Subproject Status Report documentation to the Site Coordinator
CPS Impact Measurement reporting	Project Office	Excel workbook updated weekly by Project Office.
CPS led in-Service Attendance Sheets (where applicable)	Pharmacy Site Champion	Delivered to Site Coordinator and forwarded to the Project Office.
CPS List by Practice Area	Pharmacy Site Champion	Individuals to be trained and included in working with HIPP patients.
CPS Pharmacy Deployment plan document	Pharmacy Site Champion	Subproject plan that includes tasks and dates specific to Pharmacy and provided to the local facility PHASER committee.
CPS Training Material	Pharmacy Site Champion	Template provided by Project Office and customized as needed.
CPS Training Plan	Pharmacy Site Champion	Schedule for conducting CPS PGx training.
Deployment progress monitoring	Pharmacy Site Champion	Identify and manage issues as they occur. Include in monthly subproject status report
Documentation of completion of CPS PGx Training requirements	Pharmacy Site Champion	Send copies to the national PHASER pharmacy program manager.
HIPP Report and Update process	Project Office	Excel workbook updated weekly by Project Office.
Monthly Subproject Status Reports	Pharmacy Site Champion	Provided to the Site Coordinator for inclusion in the monthly site status report.
Pharmacy leadership documentation of support	Pharmacy Site Champion	Pharmacy leadership to sign a finalized copy of the PHASER Pharmacogenomics Pharmacy Deployment Plan.
Pharmacy PHASER Deployment Kickoff Presentation	Pharmacy Site Champion	Template provided by Project Office and tailored as needed.
Project Document Repository	Pharmacy Site Champion	Location for documents such as the deployment plan, meeting agendas and minutes, CPS list, HIPP report, etc. Shared with Site Coordinator.
Project Organization Chart	Pharmacy Site Champion	Facility pharmacy leadership and stakeholders.
Submission of documentation to national PHASER pharmacy program manager	Pharmacy Site Champion	Finalized PHASER Pharmacogenomics Pharmacy Deployment Plan document. Note: this is a subsection of the overall PHASER site deployment plan.

Glossary of Terms and Definitions

This is a preliminary list of terms for inclusion in a proposed glossary. Definitions will be added if the team decides a glossary should be included in the document and, if so, which terms should be included to keep the size manageable.

Clinical Coordinator Competency Checklist

Clinical Pharmacy Specialist (CPS)

Corporate Data Warehouse (CDW)

CROC – what does it stand for again? I keep forgetting.

High Impact Pharmacogenomic Patients (HIPP)

Interfacility Consult

National Pharmacogenomic Testing for Veterans (PHASER) Program

PHASER Project Office

PHASER Reminder Dialog

Pre-Appointment Patient Mailing

Sanford Health Imagenetics Lab

Appendix A – PHASER Site Measurements

Measurements are divided into three categories.

1. **Deployment Measurements** measure progress towards specific project and subproject completion criteria. They are tracked and reported by the site PHASER team. When these objectives are met the project or subproject ends, the sustainment phase of PGx implementation begins for that project or subproject, and the reporting of Deployment Measurements stops.

2. **Performance Measurements** are measures of operational performance, such as the number of PGx tests performed, the number of HIPP patients consented, and the number of times a CROC fires. These are tracked by the project office and reported to the site PHASER team. The measurement process is expected to continue for the life of the national project.

3. **Audit Measurements** are quality indicators of expected versus actual results. Examples are the number of errors found in the entry of VistA/CPRS Health Factors and the number of PGx lab orders that were placed but not successfully resulted. These are tracked by the project office and reported to the site PHASER team for remediation as needed. The measurement process is expected to continue for the life of the national project.

Deployment Measurements

Local PHASER project teams establish the following specific objectives for their deployment efforts during the deployment planning phase. They track and report them monthly to local leadership and the national project office. They are included in the criteria for judging the success of overall PHASER deployment project at a local site and also the success of subprojects, such as the deployment of PHASER in a specific clinic.

PHASER Site Project Measurements

1. Total number of eligible clinics or departments at which PHASER has been successfully deployed.

2. Percentage of the site patient population tested.

3. Percentage of eligible providers trained.

PHASER Site Subproject Measurements

1. Percentage of the clinic patient population tested (if applicable).

2. Percentage of eligible providers trained.

Performance Measurements

The national project office uses data extracted from the VA CDW to report the following information to local PHASER sites each week.

1. Cumulative detailed list of all PGx lab orders with their current status.

2. PGx lab order discrepancy report, such as orders for which specimens were collected but results have not been entered in VistA/CPRS in the 30 days following specimen collection.

3. Weekly CPS Impact Measurement reporting.

Audit Measurements

The national project office uses data extracted from the VA CDW to report the following information to local PHASER sites each month.

1. A list of discrepancies between results documented in VistA/CPRS when compared with results reported in test results returned by the Sanford Health Lab.

Appendix B - Monthly Status Report Format

A rough outline of basic contents. An improved example will be provided in a future draft. Compiled by the Site Coordinator with input from the Pharmacy Site Champion and Site Champion. Delivered to the site core team, site leadership, and the PHASER Project Office by the end of the first full week of every month.

Executive Summary

(short high-level description of the month) This month we successfully completed our PHASER dry run test and sent our first live test specimen on xx/xx. We started PHASER deployment in Primary Care and met with Dr. XXXXX to discuss deployment in the Mental Health clinic. Our Pharmacy Champion conducted the Pharmacy kickoff meeting for the Primary Care CPS team. We are on schedule and there are no major project issues.

Accomplishments

X

Plans for (the next month)

X

Project Issues

X

Project Milestones as of xx/xx/xxxx

Format of the milestone plan with probably change.

ID	Milestone	Owner	Status	

Appendix C – Deployment Project Plan and Milestone Standards

- The deployment project plan and milestone standards are structured to achieve these goals:

    o Help keep the PHASR core team prioritize work and stay on track.

    o Minimize project management overhead while maintaining the ability to control planned activity and communicate project status.

    o Help the PHASER core team coordinate activity so, for example, training of the Pharmacy CPS staff happens in conjunction with clinic provider staff.

- Milestone-level tracking is sufficient for reporting to the PHASER Project Office. You do not need to identify specific tasks or estimate task durations. A milestone describes a significant zero-duration event that is used to track progress. A few examples:

    o Clinic in-service scheduled.

    o Clinic in-service completed.

    o In-service attendance sheet submitted to project office.

    o Meet with medical director of clinic X.

    o Start pre-visit patient mailings for clinic X.

    o Contact PAO to arrange PHASER message posting on our external website.

    o If an activity is ongoing, establish a series of milestones that represent intermediate steps. Some examples:

        ▪ For pre-visit patient mailings establish a milestone for each date on which mailings are sent and record the number of mailing sent.

        ▪ If you are contacting patients directly create a milestone for the start date, end date, and weekly report of activity.

        ▪ For clinic rounding create a milestone for the date on which you plan to visit the clinic and possibly for the delivering the results to your Site Champion.

- There should be at least two tracking milestones per calendar week.

- You do not need to identify dependencies between milestones.

- Each milestone has an owner and a planned due date.

- A barrier to achieving a planned milestone is a project issue that should be identified in the monthly project status report along with an assessment of the impact and an action plan for resolving the issue.

- For the Status column use:

    o **Complete** – Milestone achieved. The Plan Date should be the date the milestone was completed.

    o **Open** – A milestone for which does not have a specific date yet.

    o **Planned** – A specific date for the milestone has been established.

    o **Rescheduled** – The Plan Date has been changed from the previous version of the deployment plan.

Deployment Project Plan Example

To be completed in next draft,