

The Gravity Project

Actors, Assumptions, Pre/Post Conditions

June 6, 2019

SIRENetwork.ucsf.edu



Welcome

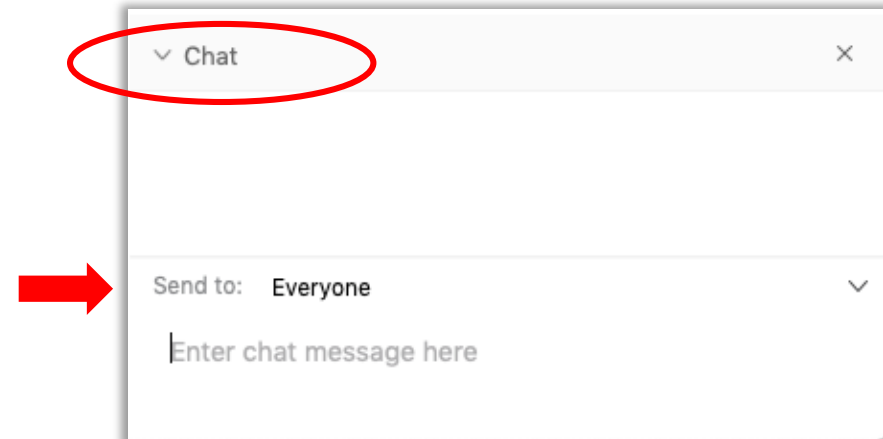
Thank you for joining the **Gravity Project** Workgroup meeting!

Due to the large number of attendees, participants are **muted upon entry**. Please remain muted to avoid background noise.

- This call is being recorded; recording will be available on the Gravity Confluence page following the meeting.

You are encouraged to actively participate in the discussion using the Webex chat feature (bottom right of the Webex Meeting window).

Please send chats to “Everyone.”



We will review and try to address all comments submitted during the call. If you are experiencing technical difficulties, please contact lynette.elliott@emiadvisors.net.

Gravity Project Participation

- If you have not already done so, we invite you to officially join the project here:
<https://confluence.hl7.org/display/PC/Join+the+Gravity+Project>
- If you want to check whether you have already signed up or if others from your organization have signed up, please review the existing membership here:
<https://confluence.hl7.org/pages/viewpage.action?pageId=46892669#JointheGravityProject-GravityProjectMembershipList>
- For all other Gravity Project information, please visit:
<https://confluence.hl7.org/display/PC/The+Gravity+Project+Home>

Agenda

| Topic | Presenter |
|--|--------------------------|
| Review Patient Story 1 and Use Case Edits | Evelyn |
| Introduce new Personas and Patient Story Submissions | Evelyn/ Collaborative |
| Review draft Actors, Use Case 1 Actor-Transaction Diagram, and Assumptions | Evelyn/ Collaborative |
| Q&A | All |
| Next Steps | Evelyn |

Please submit questions and comments using the Webex chat feature.

Goals for Today

- Review Collaborative feedback on Patient Story 1 and Use Cases
- Introduce new Persona and Patient Story submissions
- Introduce actor-transaction diagram in context for review of actors, assumptions, and pre and post conditions to support Use Cases

Gravity Project Schedule and Activities (June to July)

| Week | Target Date | Gravity WG Meeting Tasks | | Homework <i>due following Tuesday COB</i> |
|------|-------------|--|--|--|
| ★ 6 | 6/6 | Actors, Assumptions, Pre/Post Conditions, | <i>Review: Personas, Patient Stories, Use Cases</i> | <i>Review: Actors, Assumptions, Pre/Post Conditions</i> |
| 7 | 6/13 | Base Flow, Activity Diagrams, Functional Requirements, Sequence Diagram | <i>Review: Actors & Roles, Assumptions, Pre/Post Conditions,</i> | <i>Review: Base Flow; Activity Diagrams; Functional Requirements, Sequence Diagram</i> |
| 8 | 6/20 | Data Set Considerations, Risks, Issues, & Obstacles | <i>Review: Functional Requirements, Sequence Diagram</i> | <i>Review: Data Set Considerations, Risks, Issues, & Obstacles</i> |
| 9 | 6/27 | Risks, Issues & Obstacles | <i>Review: Data Set Considerations, Risks, Issues, & Obstacles</i> | <i>Begin: End-to-End Review</i> |
| 10 | 7/4 | NO MEETING | | |
| 11 | 7/11 | End-to-End Review (6/28-7/8) | <i>Review: End-to-End Comment Dispositions To-Date</i> | <i>End-to-End Review due 7/8</i> |
| 12 | 7/18 | Food Insecurity Kick-Off <i>Introduce: Food Insecurity Data Set Submissions</i> | | <i>UC Consensus Voting (7/15-7/19)</i> |
| 13 | 7/25 | FINAL UC CONSENSUS | <i>Review: UC Vote Dispositions</i> | <i>Review: Food Insecurity Data Set Submissions from Community</i> |

Patient Story 1

- Personas:
 - Rebecca Smith (patient)
 - Samir Patel (clinical staff member)
 - Dr. Carla Sanchez (primary care physician)
 - Reeza Shah (care coordinator)
 - Michael Frank (asthma home visit provider)
- Settings:
 - Rebecca's home, PCP office, Rebecca's work site
- Activities:
 - Screening, diagnosis, planning, and treatment

Patient Story 1 Edits

New Personas and Patient Story Submissions

New Persona Candidates

- Betsy Inara (Community Health Worker/ Care Coordinator)
- Angela Griffith (Elderly Patient)
- Abigail Johnson (Young Adult Patient)

<https://confluence.hl7.org/display/PC/Gravity+Personas>

Patient Story 2 (MITRE submission)

- Human Actors:
 - Tayla Jones (patient)
 - Taylor Jones Mother (caregiver)
 - Pediatrician 1
 - Pediatrician 2
- Settings:
 - Pediatrician office, Taylor's school
- Activities:
 - Screening, diagnosis, planning, and treatment

Actors, Assumptions, Pre/ Post Conditions

Use Case Package Outline

1.0 Preface and Introduction**

2.0 Project Overview

2.1 Project Challenge Statement**

3.0 Use Case Scope

3.1 Background**

3.2 In Scope**

3.3 Out of Scope**

3.4 Stakeholders

4.0 Patient Story

5.0 Actors

5.1 Human Actors, Business Actors System Actors

5.2 Actor Transaction Diagram

6.0 Use Case Assumptions

7.0 Use Cases

7.1 Use Case 1 (repeat for 2,3,4...)

7.1.1 Activity Description

7.1.1.1 Preconditions

7.1.1.2 Main Flow

7.1.1.3 Post Conditions

7.1.2 Functional Requirements

7.1.3 Sequence Diagram

8.0 Risks, Issues and Obstacles

9.0 Data Element & Value Set Requirements

Appendices

Related Use Cases

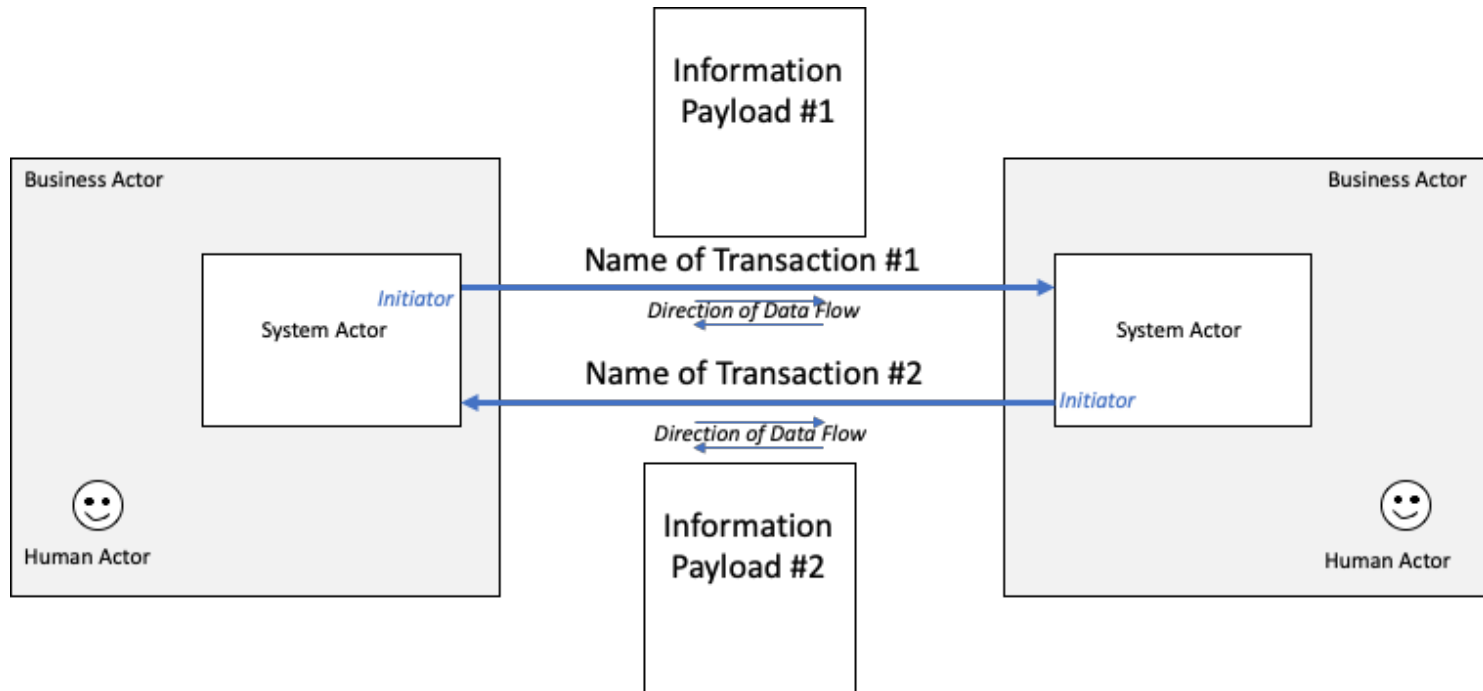
Previous Work Efforts

References

** Developed from Project Charter

Actor-Transaction Diagram

Pre-conditions: activities that must take place before the transaction is executed.



Post-conditions: activities that result after the execution of the transaction.

Actors

- Actors are participants in the information exchange requirements of the Patient Story
- Each actor has a role (e.g., document, send, receive, aggregate, and publish) and performs a set of activities to support the transactions of the Patient Story
- Transactions can be instantiated by an IT system that the Actor uses in the documentation, exchange, and aggregation of data
- Actors include:
 - Human Actors (Personas)
 - Business Actors (e.g, health system, Payer entity, PCP practice)
 - System Actors (EHR application)

Patient Story 1 Actors

■ Human Actors

- Patient
- Clinical Staff Member
- Primary Care Physician
- Care Coordinator
- Community Service Providers (asthma home visit, housing coordinator, transportation provider)

■ Business Actors

- Primary Care Physician Practice
- Community Service Provider Offices (Home Site Visit Program, Housing Services, Transportation Services)
- Payer Entity (State Medicaid, Managed Care, Commercial)

Patient Story 1 Actors

▪ System Actors

- Patient Mobile Phone
- Social Risk Screening App
- EHR System (Clinical and Care Coordination Platform)
- Pharmacy System
- Community Service IT System (Case Management)
- Transportation Service App
- Payer System
- Health Information Exchange Platform ?
- Community Information Exchange Platform?

Use Case 1: Document SDH data in the Patient Encounter

Pre-condition: Patient completes a social risk screening questionnaire on a mobile tablet available in the PCP office.

Transaction #1: A Clinical staff member uploads completed questionnaire into EHR.

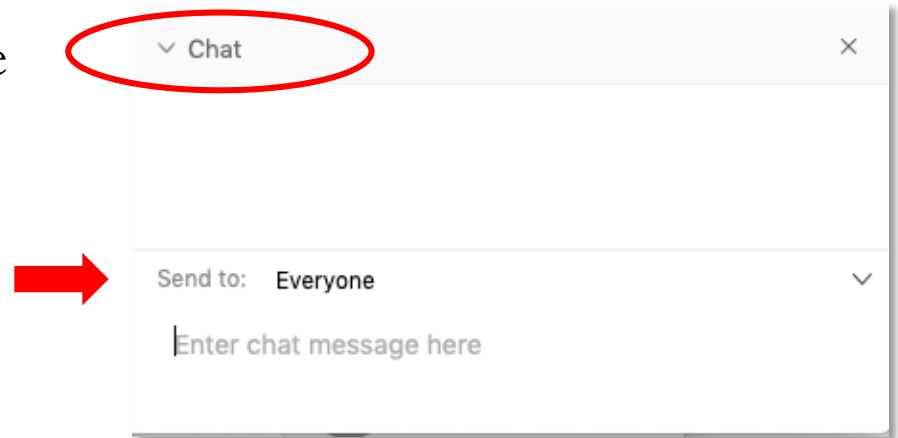
Information payload: Coded questions and answers relevant to screening for social risks and needs.

Post-condition: PCP uses EHR to review and discuss the results from the social risk screening with Patient. The results indicate distinct risk around three areas (*food insecurity, housing instability and quality, and transportation access*). PCP records concerns in the EHR and indicates the Patient has a goal to make improvement in all three areas. The PCP records a completed intervention to refer the patient for care coordination services.

Questions?

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Patient Story 1 Assumptions

Assumptions outline what needs to be in place to meet or realize the requirements of the use cases.

- Patient has health insurance
- Patient has access to health care—can schedule annual wellness visit
- Patient’s information will be shared and accessed in compliance with policy, regulation, and Patient Consent Directives
- Patient has mobile phone with text messaging and email capabilities
- Patient is approved to receive community-based services
- Patient leads and/or directly engages in the creation of goals to address the health concerns and social needs
- Patient has the ability to grant consent to care plan for selected care team members
- Patient and Care Team members have the ability to define notifications and designate notification recipients

NEED GRAVITY COLLABORATIVE INPUT

Patient Story 1 Assumptions (cont'd)

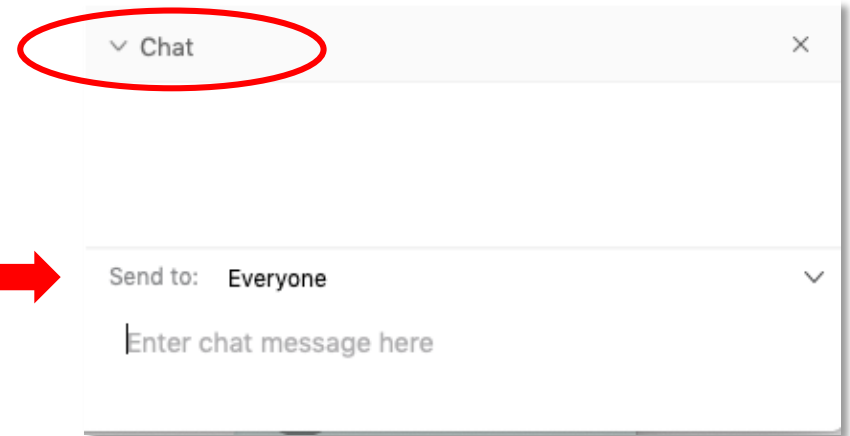
- The Care Coordinator is the facilitator/steward who is responsible for reviewing and reconciling proposed modifications to the care plan
- Patient follow-up appointment scheduled during Patient's lunch break
- Necessary access and entry authorization protocols, for any of the systems or users described, are in place
- Screening information can be accessed and retrieved in a structured and coded format
- EHR is capable of storing captured data and associating it with the specific patient and encounter as part of the permanent medical record
- EHR is source of truth for Patient social risk related screening, diagnosis, planning, and treatment
- Acknowledgment and error-handling messages will be handled by standard IT protocols and will not be addressed within the scope of this Use Case

NEED GRAVITY COLLABORATIVE INPUT

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Next Steps (Homework)

- Join the Gravity Project either as a Committed Member or Other Interested Party
<https://confluence.hl7.org/display/PC/Join+the+Gravity+Project>
- Download and begin to populate the Data Element Submission Template
<https://confluence.hl7.org/display/PC/Data+Element+Submission>
- Review Patient Story 1 Actors, Actor-Transaction Diagram, and Assumptions and send revisions and additions to:
gravityproject@emiadvisors.net

Thank you for participating in this national
consensus-building process.

Additional questions? Contact: gravityproject@emiadvisors.net