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Planned iTransplant Maintenance Process Instruction

Policy:

Trillium Gift of Life Network (TGLN) electronic Donor Management System is called iTransplant which is maintained by Transplant Connect. Three to six times annually iTransplant requires scheduled maintenance which requires it to be taken offline. Maintenance may include the following: new iTransplant releases, delivery of TGLN change requests, bug fixes, program additions and program alterations. Transplant Connect sets release dates for the coming year at the end of the previous year. On average there is at least one release every quarter.   During this time, clinical operations in the Provincial Resources Centre (PRC) and in the field revert to a manual process.

For the purposes of this document, the TGLN Coordinator may be the Referral Triage Coordinator (RTC), Clinical Services Coordinator (CSC), Surgical Recovery Coordinator (SRC), Organ and Tissue Donation Coordinator (OTDC), Tissue Coordinator (TC) and/or Tissue Recovery Coordinator (TRC).

Process:

Information Technology Process

1. TGLN Information Technology (IT) – Application Support department submits iTransplant change requests to Transplant Connect as required.

2. Transplant Connect implements the changes to TGLN's iTransplant training site.

3. TGLN and all affected stakeholders perform User Acceptance Testing (UAT) on all TGLN custom changes to confirm the changes have been delivered accurately. Once TGLN and all affected stakeholders have approved and accepted delivery, the PRC Clinical Director or designate approves the changes for TGLN.

4. TGLN IT – Application Support notifies Transplant Connect that the changes have been approved. Transplant Connect schedules the deployment date of the changes to TGLN's iTransplant production site. As this is a "Gated Process" the vendor is not permitted to update the TGLN LIVE iTransplant System without TGLN's Approval.

5. TGLN Service Desk (SD) sends a notification email one week prior to the scheduled maintenance on iTransplant to all users that will be affected by the scheduled downtime.

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6. TGLN Coordinators and Serology Labs prepare for the planned shutdown on the scheduled day.

7. TGLN Manager-on-Call (MOC) reviews case activity 90 minutes prior to the planned shutdown of iTransplant and determines if iTransplant can be shutdown.

   7.1. Should case activity not allow the shutdown of iTransplant for maintenance, the MOC notifies TGLN IT – Application Support of the "no go" status. TGLN IT – Application Support contacts Transplant Connect to inform them the planned shutdown has been aborted and reschedules the planned maintenance, either to another time during the day or another date. TGLN SD sends notification that the scheduled maintenance is cancelled and has been rescheduled for another time/date.

   7.2. If case activity allows for the shutdown, the MOC notifies TGLN IT – Application Support of the "go" status. TGLN SD notifies all affected users that the planned maintenance will go ahead as planned.

8. TGLN Coordinators and Serology Labs complete their preparation for the planned shutdown during this time.

9. TGLN IT – Application Support sends notification to all affected users and Human Leukocyte Antigen (HLA) labs, as the push of information from iTransplant to TOTAL will not occur during the shutdown, that iTransplant will be shut down for maintenance in 5 minutes and to log off the system.

10. At the scheduled maintenance time iTransplant is taken offline for maintenance. Transplant Connect performs the necessary changes while all users follow a manual process for managing case activity. If a user attempts to log-in during this period, they will be notified that the system is currently not available.

11. MOC identifies one member from the PRC Organ team to be the TGLN PRC representative who will perform sanity testing on the push to TOTAL once the system is back online.

12. Transplant Connect informs TGLN SD and the PRC representative once maintenance is complete.

13. TGLN PRC representative performs the sanity testing by performing the following task.

    13.1. Using an existing test donor case, the PRC representative performs a push to TOTAL to ensure the changes made to iTransplant hasn't affected the data connection between the two systems or interfered with the functionality of iTransplant.

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14. If the TGLN PRC representative and determine the sanity test is not successful, the TGLN PRC representative informs Transplant Connect of the problems discovered. The MOC determines if the problems are minor or significant in nature.

    14.1. Problems minor in nature (e.g. visual), Transplant Connect determine a workaround for the time being and Transplant Connect will fix the issue outside of the maintenance window

    14.2. Problems significant in nature, the MOC determines if the maintenance window can be extended to fix the problem. If the maintenance window cannot be extended, Transplant Connect will revert iTransplant to the previous release and reschedule the maintenance. TGLN SD notifies all users that iTransplant has not been upgraded and that the planned maintenance has been rescheduled. If the maintenance window is extended and affects case activity, the MOC will notify the Administrator on Call (AOC) of the situation.

15. If the TGLN PRC representative and determines the sanity test is successful, the TGLN Clinical Specialist (CS) will notify the Quality Documentation Coordinator to upload a Read & Understand notice in iTransplant requiring staff to acknowledge the new changes in iTransplant. The Quality Documentation Coordinator will inform the CS when complete.

16. TGLN SD notifies all users that the system is back online and ready for use.

17. TGLN IS- Application Support updates the iTransplant user matrix in the live system to reflect any new user access changes.

PRC-Organ/ OTDC Process

18. RTC/CSC prints out a copy of the iTransplant dashboard of active referrals.

19. For all active cases, the RTC/CSC creates a PDF of the patient charts two hours prior to the scheduled shutdown. The patient chart includes:

    - Organ Chart With Personal Information (PI)
    - Organ Chart Without PI
    - Clinical Notes
    - Organ testing results, if applicable

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20. OTDC saves patient charts with PI in PDF format of any open cases 45 minutes prior to the planned shutdown.

21. RTC, CSC and OTDC ensure an adequate number of paper forms are printed out from the Online Resource Centre (ORC) to handle new referrals and ongoing case activity. These paper forms may include:

    - Triage form
    - Assessment Form: Organ/Combined Organ and Tissue Donor

22. At the scheduled maintenance time that iTransplant is taken offline for maintenance, RTC, CSC, OTDC and SRC follow a manual process for referral intake and case management.

    22.1. CSC, OTDC and SRC use paper forms to record all information and document clinical notes. For new organ referrals received during this time, the RTC/CSC will record the referring unit's contact information and inform the hospital that a TGLN number will be assigned when the system is back online.

    22.2. OTDC fax all collected information to the PRC.

    22.3. Serology labs fax donor test results to the PRC.

23. If there is a need to allocate a recipient requiring a virtual cross-match (VXM) during the shutdown period, the CSC will request the HLA lab to perform a manual VXM to allocate organs.

24. TGLN Coordinators are informed when iTransplant is returned to service and perform the following activities:

    24.1. All new organ referrals received during the shutdown period will be registered into iTransplant and assigned a TGLN number. RTC/CSC will adjust the referral date and time in iTransplant to reflect the actual time recorded on the paper copies of the triage forms. The RTC/CSC will contact the referring unit to notify them of the TGLN number assigned to their patient.

    24.2. CSC, OTDC, SRC and Serology labs transcribe information collected on paper into iTransplant. CSC and OTDC upload all paper copies into the appropriate donor chart in iTransplant.

    24.3. OTDC shall delete saved PDF patient charts on computers and RTC/CSC will shred any paper copies of uploaded records.

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PRC-TC Process

25. During a shutdown of iTransplant, the TC's activities can be divided into the following three categories: Active Cases, New Referrals and Early Referrals.

Active Cases

26. TC printout the iTransplant dashboard of active cases

27. TC saves patient charts in PDF format with PI and prints out any active cases. The patient chart includes:

- Tissue Exclusive Chart
- Tissue Chart (Organ Case), if applicable
- Eye Tissues Recovered
- Consent
- Donor Preference Lookup printout
- Hold Body Form (HBF)
- Notes – Clinical Notes

28. TC continue to coordinate cases and document as usual using the paper copy of the chart.

New Referrals

29. TC ensure an adequate number of paper forms from the ORC are printed out to handle expected case activity two hours prior to the planned shutdown. The forms include:

- Tissue Assessment Form

- Medical and Social History Questionnaire

- Eye Recovery Form

30. TC obtain folders and labels to create paper charts using the forms printed out above.

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Early Referrals

31. When a Healthcare Professional (HCP) calls in an early referral, they are informed the system is down and requested to call back after the scheduled time the system is expected to be back in service.

32. If the HCP calls in death of an early referral, a new assessment form is completed with information from the initial referral, including TGLN number if known.

33. At the scheduled maintenance time iTransplant is taken offline for maintenance. TC follow a manual process.

    33.1. TC use paper forms to record all information and let hospitals know a TGLN number will be assigned when the system is back online. The TGLN number will be communicated to the hospital when it is assigned.

    33.2. TC obtain and print off hard copies of the donor preference (DP) lookup.

    33.3. TC ask early referrals to call back after the scheduled time when the system is expected to be restored.

    33.4. TC continue to offer and/or coordinate case as usual from paper copy of the chart.

    33.5. Release of body confirmations are tracked in an excel spreadsheet on the common drive with the following information:

    - patient first and last name
    - date and Time of referral
    - time of Death (TOD) on Date of Death (DOD)
    - TGLN# (if available)
    - contact information from the HCP

34. TC/TRC are informed when iTransplant is returned to service and perform the following activities:

    34.1. TC/TRC transcribe information collected on paper forms and spreadsheet into iTransplant including updates to active cases and entering new referrals.

    34.2. TC/TRC shall adjust referral time and date to reflect the actual time on the paper copies of the assessment form.

    34.3. TC/TRC upload all paper forms used into iTransplant.

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34.4. TC/TRC call back paper cases to assign TGLN number (both unit and contact where hold body form was sent).

34.5. TC/TRC delete saved PDF patient charts on computers and shred any paper copies of uploaded records except for the consent.

Records:

- No records.

References:

- No references.