

Quality Process Instruction Manual

iTransplant Change Request Process Instruction

1.0 Purpose:

To document the process of iTransplant enhancement (change) requests including enhancement requests, user acceptance testing in the iTransplant training environment to deployment into the iTransplant production environment.

2.0 Scope:

This procedure applies to:

- Trillium Gift of Life Network (TGLN)
- Transplant Connect

3.0 Responsibilities:

iTransplant Users are responsible for:

- completing and submitting the *iTransplant Enhancement Request Form* to their manager/director

Managers/Directors are responsible for:

- reviewing and approving iTransplant change requests
- ensuring all applicable changes to documentation are reflected in the iTransplant change requests
- submitting change requests to the TGLN Transplant Connect Liaison
- collaborating with Transplant Connect as required
- approving work orders to authorize deployment of the changes to the iTransplant production environment
- performing User Acceptance Testing (UAT) in the iTransplant training environment
- adding and/or revising the iTransplant User's Definition Guide
- signing off on staff training

TGLN Transplant Connect Liaison is responsible for:

- ensuring the *iTransplant Enhancement Request Form* is completed accurately and provides sufficient detail for Transplant Connect to develop the requested change
- submitting the change request to Transplant Connect
- obtaining financial approval for the change request
- review work order ensure alignment/agreement with our change request

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- ensure Informatics and Application Development teams review work order and assess impact on Trillium Organ and Tissue Allocation System (TOTAL) and reporting
- ensure work order is signed
- submitting approved work order to Transplant Connect for development
- determining the timelines for implementation
- informing the Users when changes have been deployed to the training environment for UAT
- creating education notes and implementation plan for the change request
- notifying ServiceDesk when the changes will go live in the iTransplant production environment

Quality Documentation Coordinator is responsible for:

- preparing read and understand materials for posting into the iTransplant production log-in acknowledgement, when required
- implementing the log-in acknowledgement when notified by the TGLN Transplant Connect Liaison, when required

Application Development is responsible for:

- Assess work order for impact on iTransplant's push to TOTAL performing a sanity test in iTransplant to verify the push to TOTAL has not been affected by the changes to iTransplant

ServiceDesk is responsible for:

- notifying users when the iTransplant production environment will be taken out of service for implementation of change requests
- notifying users when the iTransplant production environment is back in service for use after implementation of change requests

Informatics is responsible for:

Assessing the impact of iTransplant change requests on internal and public reporting

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4.0 Process:

- 4.1 User raises a change request by submitting an *iTransplant Enhancement Request Form* to their manager/director.
- 4.2 The User's Manager/Director reviews and approves the request. During the review of the request the Manager/Director ensures all applicable changes to documentation related to the request have been incorporated.
- 4.3 The User's Manager/Director submits the approved change request to itxreq@giftoflife.on.ca.
- 4.4 TGLN Transplant Connect Liaison receives the change request and reviews it for completeness and clarity. If required, the TGLN Transplant Connect Liaison works with the user/manager/director to complete and/or clarify the change request.
- 4.5 TGLN Transplant Connect Liaison submits the change request to Transplant Connect.
- 4.6 Transplant Connect determines if the change request is feasible. If feasible, issues a work order for the requested change and provides a cost for the requested change to the TGLN Transplant Connect Liaison.
- 4.7 TGLN Transplant Connect Liaison provides a copy of the work order to ServiceDesk for distribution to TGLN's Application Development (AppDev) and Informatics departments. The AppDev and Informatics departments review the work order to determine the impact it will have on their processes and make adjustments as required.
- 4.8 TGLN Transplant Connect Liaison reviews the request with the Director, Quality Assurance and Improvement to ensure the change request corresponds to changes in documentation, if applicable. At this time the Director, Quality Assurance and Improvement freezes changes to documentation until the change request is implemented.
- 4.9 TGLN Transplant Connect Liaison obtains financial approval for the change and informs Transplant Connect to proceed with the changes.

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Transplant Connect implements the change in the training environment and informs the TGLN Transplant Connect Liaison when it is ready for UAT testing. TGLN Transplant Connect Liaison informs the manager/director of the change being live in the training environment and requests UAT to be completed.

- 4.10 The manager/director works with users to complete UAT. If UAT determines the change was not implemented properly, the manager/director works with the TGLN Transplant Connect Liaison and Transplant Connect to ensure the change request is implemented properly.
- 4.11 The manager/director approves the work order by initialling it once the UAT is complete.
- 4.12 TGLN Transplant Connect Liaison provides written acceptance to Transplant Connect to implement the change in the iTransplant production environment.
- 4.13 Transplant Connect schedules date and time for when change request will be implemented into the iTransplant production environment and informs the TGLN Transplant Connect Liaison.
- 4.14 The TGLN Transplant Connect Liaison informs the Quality Documentation Coordinator (QDC) of the date and time of the change going live in the iTransplant production environment if Read and Understands are required. The QDC prepares the Read and Understand materials.
- 4.15 The TGLN Transplant Connect Liaison informs ServiceDesk of the date and time the change will go live in the iTransplant environment.
- 4.16 On the day of the change, ServiceDesk sends a reminder email that iTransplant will be taken offline at a specified time.

Transplant Connect takes the iTransplant production environment offline at the specified time and deploys the change request. Transplant Connect completes the changes within 15 minutes of the specified time. Transplant Connect only contacts TGLN Transplant Connect Liaison if there is an issue with the deployment of the change request and does not go forward with the change. More details of this process are documented in OPI-9-101, *Planned iTransplant Maintenance Process Instruction*.

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- 4.17 The TGLN Transplant Connect Liaison or designate checks to see that the Health Canada related fields of the change request has been implemented. If changes have not been implemented, the TGLN Transplant Connect designate works with Transplant Connect to resolve the issues.
- 4.18 TGLN Transplant Connect Liaison informs the QDC the changes are live in the iTransplant production system, if read and understands are required. The QDC will implement the log-in acknowledgement for the read and understand process to occur. The QDC informs the TGLN Transplant Connect Liaison when this is complete.
- 4.19 AppDev performs a sanity test to ensure the push to TOTAL has not been affected by the changes made to iTransplant. AppDev informs TGLN Transplant Connect Liaison once the sanity test has been completed.
- 4.20 TGLN Transplant Connect Liaison ensures page security access is updated if required.
- 4.21 TGLN Transplant Connect Liaison inform ServiceDesk when the iTransplant production environment is ready to use again.
- 4.22 ServiceDesk sends an email to all users notifying them that the iTransplant production environment can be used again.

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5.0 Records:

| Record Name | Form No. (if applicable) | Record Holder | Record Location | Record Retention Time (as a minimum) |
|------------------------------------------|-----------------------------|-----------------------------------------|-------------------------|-----------------------------------------|
| iTransplant Enhancement Request Form | -- | TGLN Transplant Connect Liaison | Hospital Development | 16 years |
| Transplant Connect Work Order | -- | TGLN Transplant Connect Liaison | Hospital Development | 16 years |
| ServiceDesk Emails | -- | TGLN Transplant Connect Liaison | Hospital Development | 16 years |
| iTransplant Log-in Acknowledgment Record | -- | Quality Documentation Coordinator | Quality | 16 years |

6.0 References:

None

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Exhibit 1: Sample iTransplant Enhancement Request Form



iTRANSPLANT ENHANCEMENT REQUEST FORM

| | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| How to complete Enhancement Requests: 1. Complete each applicable field, including date submitted. 2. When completed, save document ensuring filename is the same as the Request title. 3. Send to Manager/Director for review and approval. 4. Keep one copy for your records and e-mail one copy. 5. Manager/Director E-mails Request to itreq@giftoflife.on.ca | | Request ID # Date Submitted: Click here to enter a date. Manager Approval: Requester Name: E-Mail: Phone: |
| Enhancement Request: <i>Give the request a short name</i> | | |
| Problem Statement: <i>What isn't working? What needs to be fixed? Why is it a problem? How would fixing it make the system better?</i> | | |
| Proposed Solution: <i>What exactly needs to be done? Add a new field? Put a field on a page? Change a calculation? Do your best to describe what you anticipate the change to be.</i> | | |
| Screenshot Description: <i>System Tab / Area Page Field on page</i> | | |
| IM DIRECTOR APPROVAL: | <input type="checkbox"/> Yes <input type="checkbox"/> No | DATE OF APPROVAL: Click here to enter a date. |
| If NOT APPROVED, REASON: | | |
| COMPLETED BY ITX LIAISON | Disposition | SELECT DISPOSITION |
| | Date | Click here to enter a date. |
| | iTransplant Release Cycle | |