

## A Brief History of the IDX Western Region Users Group

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### **Founding Issues**

By 1990, IDX had approximately 20 West Coast clients supported out of its small office in Oakland, California. IDX had been in business for over twenty years at that time growing from a small New England company beginning in 1969 into a national vendor adding new clinic and managed care software customers as far away as California and Washington. These users felt isolated; few had professional information technology staff available, and all were supported on an undocumented case-by-case basis, usually from Boston or Burlington. Gatherings of users only took place during the summer IDX National meetings in Boston. By late 1989, users from Bristol Park Medical Group, Cedars Sinai, and Harbor UCLA realized that they shared some common issues and perhaps should form a group to bring users together. This idea had also occurred to a former IDX employee, Jeff Sibley, who had gone on to head up IDX operations at California Pacific Presbyterian Professional Services in San Francisco.

With the cooperation of IDX in providing a mailing list, Jeff sent out a survey to users in March 1990. IDX provided a meeting room at the annual Users meeting that August where for the first time, West Coast users met to find that they had shared issues about communication, training, and support from IDX. This led to the first official organization meeting on November 30<sup>th</sup>, where participants meeting at Cedars Sinai Medical Center elected Lonnie Galloway as the first Chair of WRUG. She proved an articulate, forceful and personable leader. The structure of the WRUG meeting with its officers, agenda structure, quarterly meeting schedule, breakout groups, and organizational by-laws remains little changed to this day.

For many users the immediate benefits of the users group were twofold. Users and IDX staff now gathered quarterly in special interest "breakout groups" to discuss application issues, and enhancement issues. New users could get help, and experienced users could compare notes with other local users every three months instead of waiting to meet someone at the annual meeting. Users also were able to find in some instances that support issues that concerned them concerned other users. In some instances, users were told, "no one else has asked for this feature" but were able to find that in fact others had. Users were able to find common ground in identifying and focusing on common healthcare business issues, which they felt needed to be addressed by the vendor.

### **Stabilizing Service at the San Francisco Office (1991-1995)**

While Lonnie Galloway always worked to advance user priorities in a courteous, engaging and professional manner, not all users showed the same skills. Now twenty strong, with gathered together in a crowd of 50 users, complaints of service at May 1991 Stanford meeting erupted into volleys of attacks on the quality of service, support, upgrades, and the mental ability of IDX staff to support their own software. IDX staff and management in attendance at that time did their best to listen, responded that about two years would be needed to improve service, but were clearly unprepared for the depth of

feeling of inadequate support among the users. During the next two years, IDX brought on more staff, but most of those were new hires without any special experience in the software. Users continued to express general dissatisfaction over West Coast IDX support and pressed the Boston management for improvements.

The peak and valley was reached at the June 1993 meeting in San Francisco where the new Director of Customer Service Jeff Blanchard announced that the IDX approach to service was to insist that West Coast customers all reach the 7.0 software version so that IDX staff could focus supporting a single version. User reaction was initially mixed, but by the end of the meeting, there was a consensus that users would wait and see. Soon after that meeting, Mark Branning was brought in as the fourth West Coast manager in three years; he faced a skeptical audience of users who had now worked together with IDX, but had seen only minor improvements in West Coast service. The users group was at its most united, ready to withhold site visits, write letters in each other's behalf, and commanding the attention of client management staff who took an active interest in users letters to IDX and IDX responses. This unity would gradually diminish over the years, to the March 1998 meeting when a founding member, Cathy Coyle of the Santa Cruz Medical Group, was unable to rouse user interest in uniting against the unequal fee structure IDX set into place for the Year 2000 evaluation.

During the next two years Mark Branning shepherded the upgrade process through a focus on Pacific Presbyterian (now Brown and Toland Medical Group) through the initial 7.0 upgrade, then kept up a steady stream of quarterly upgrade reports and user satisfaction surveys. Bit by bit, Mark wore down user dissatisfaction in the face of improved or stabilized issue turnaround times. Some user enhancements were completed, some were shelved, but the staff of the West Coast office grew more experienced in supporting user problems as their manager managed both the staff and user expectations to bring service to up, and eventually surpassing the service delivered in other IDX regions.

### **The West Coast becomes a Full Service IDX service region (1995-2000)**

As the urgent need for experienced support declined, the character of the IDX WRUG changed towards a more mainstream user group. As an established user group, user management felt more comfortable about sending more junior staff to the meetings for training and to gain experience. The user groups also focused more on the finding larger and larger hotels to accommodate the growing interest. During the first year of its existence, the user groups drew about 60 participants including IDX staff. By the late 1990's user meetings attracted 200-300 participants and the meetings commonly ran into a Thursday training or afternoon BAR discussion group as well as the full day Friday program. IDX for its part, continued to upgrade employee training, and tools, including purchase and installation of Internet based customer support products, as part of its metamorphosis from a small private to mid-sized national public company. In 1998, Carol Wanke from Sharp Healthcare became the first non-founding member to be elected chair. She steered the organization into a more inclusive role. In the early years IDX appearances and product demonstrations were strictly controlled and debated months in advance. During Carol's term IDX events, including sponsorship of social hours were welcomed as the organization grew in size and inclusion. Since the founding of the user group some WRUG members joined IDX, other from IDX signed on as client users. Staff from both organizations have gone on to start or join consulting organizations and served both sides not only on the West Coast and Nationally. The fee for service brain trust now serves as an important repository of user and vendor knowledge, history, and new services in addition to the standard IDX maintenance organization. This was recognized by WRUG leadership and membership at the first meeting of the 2000 granting the availability of nonvoting membership consultants. The WRUG membership, and IDX now face continuing unrelenting cost pressure from health care insurers, employers, and the regulatory pressures over governmental agencies such as the

Health Insurance and Accountability Act which will spawn a different set of problems over the next ten years of WRUG.

Officers of WRUG (1990-2000)

Chair	Vice Chair/Vendor Relations	Program Chair	Secretary	Treasurer
Lonnie Galloway, Bristol Park	Charles Thrower, Cedars Sinai	Jeff Sibley, Cal Pacific Prof Services	John O'Flaherty, UCSD	Michael Rice, Harbor UCLA

1993

Chair	Vice Chair/Vendor Relations	Program Chair	Secretary	Treasurer
Marty Mendoza, Stanford	Suzann Demianew, Pac Med Ctr	Karla Kelley, Washington Healthcare	Cathy Coyle, Santa Cruz MG	Rand Miyashiro, Vista Hill Fndn
		Nino Antonacci, Greater Valley MG		

1994-1995

Chair	Vice Chair/Vendor Relations	Program Chair	Secretary	Treasurer
Rand Miyashiro, Vista Hill Foundation	Chris Booker, Washington Hospital	Nita Burch, Bristol Park	Kathy Martin, Sharp Healthcare	Kristi Lass, Bay Valley MG
(1995)	Jamie Tippet, Children's MG of UCLA		Karla Kelly	

1996-1997

Chair	Vice Chair/Vendor Relations	Program Chair	Secretary	Treasurer
Hale Kuhlman, Children's MG of UCLA	Debbie Knightly, Virginia Mason	Frank Calderaro, Greater Valley Med Group	Jane Medina, Loma Linda Med Center	Linda Runolfesn, Bay Valley Med Group

1998-1999

Chair	Vice Chair/Vendor Relations	Program Chair	Secretary	Treasurer
Carol Wanke, Sharp Healthcare	Mike	Julie Holtry	Cheryl Reecker	Deb Woehler

2000

Chair	Vice Chair/Vendor Relations	Program Chair	Secretary	Treasurer
Jenner Horton, Peace Health		Mike		KMP

2010

President	VP of Vendor Relations	VP of Agenda Planning	Secretary	Treasurer
Cliff Skinner, UCSF	Marianne Terzick, Cedars Sinai	Milika Worthy-Hunter, Providence Health	Elizabeth Burrows, UC Irvine	Jan Bell, USC

2011

President	VP of Vendor Relations	VP of Agenda Planning	Secretary	Treasurer
Cliff Skinner, UCSF	Marianne Terzick, Cedars Sinai	Kelli Maxwell, St. Joseph Healthcare	Elizabeth Burrows, UC Irvine	Beverly Beck, Loma Linda University

2012

President	VP of Vendor Relations	VP of Agenda Planning	Secretary	Treasurer	VP of Web Development
Julie Castongia, HealthCare Partners	Marianne Terzick, Cedars Sinai	Kelli Maxwell, St. Joseph Healthcare	Elizabeth Burrows, UC Irvine	Beverly Beck, Loma Linda University	Tim Funk, University of AZ Health Network
	Kathy Mendoza, Sharp Healthcare				Susan Taber, St. Joseph Healthcare

2013

President	VP of Vendor Relations	VP of Agenda Planning	Secretary	Treasurer	VP of Web Development
Julie Castongia, HealthCare Partners	Kathy Mendoza, Sharp Healthcare	Kelli Maxwell, St. Joseph Healthcare	Elizabeth Burrows, UC Irvine	Lisa Englund, Dignity Health Medical Foundation	Susan Taber, St. Joseph Healthcare

2014

President	VP of Vendor Relations	VP of Agenda Planning	Secretary	Treasurer	VP of Web Development
Julie Castongia, HealthCare Partners	Kathy Mendoza, Sharp Healthcare		Elizabeth Burrows, UC Irvine	Lisa Englund, Dignity Health Medical Foundation	Susan Taber, St. Joseph Healthcare

2015

President	VP of Vendor Relations	VP of Agenda Planning	Secretary	Treasurer	VP of Web Development
Julie Castongia, HealthCare Partners	Kathy Mendoza, Sharp Healthcare	Flory Tolentino, Brown & Toland Medical Group	Elizabeth Burrows, UC Irvine	Lisa Englund, Dignity Health Medical Foundation	Aashish Thakker, USC Care Medical Group

Table of IDX Western User Group Meetings

Date	City, State	Location	Host
8/90	Boston, MA	Sheraton Hotel	Organizational Meeting
11/90	Los Angeles, CA	Cedar Sinai Offices	Cedars Sinai
5/91	Menlo Park, CA	Stanford Park Hotel	Stanford Hospital & Clinics
9/91	Torrance, CA	Harbor UCLA Professional Bldg	Harbor UCLA
12/91	San Francisco, CA	Hyatt Regency	Cal Pacific Pro Services
2/92	Redondo Beach, CA	Portofino Inn	Bay Shores Medical Group
5/92	Freemont, CA	Freemont Hilton	Washington Healthcare
9/92	Seattle, WA	Hilton Hotel	Virginia Mason
12/92	San Diego, CA	Doubletree Hotel	Vista Hill Foundation
3/93	S. San Francisco, CA (SFO)	Grosvenor Hotel (SFO)	Bay Valley Med Group
6/93	San Francisco, CA	Press Club of SF	Cal Pacific Med Services
9/93	San Diego, CA	Hyatt Islandia	Sharp Healthcare
12/93	Palm Springs, CA	Palm Springs Hilton	Scripps Clinics & Res Fndtn
3/94	Las Vegas, NV	Hotel San Remo	South West Med Associates
6/94	Torrance, CA	Sheraton LAX	Harbor UCLA Med Group
9/94	Irvine, CA	Holiday Inn	Bristol Park Medical Group
12/94	Sacramento, CA	Hyatt Regency	Sutter Medical Foundation
3/95	San Diego, CA	Ramada Inn	San Ysidro Health Ctr/CHG
6/95	San Jose, CA	Red Lion Inn	Santa Cruz Medical Group
9/95	Los Angeles, CA	Universal City Hilton	Children's MG of UCLA
12/95	Tucson, AZ	Holiday Inn	GHMA Medical Center
3/96	San Diego, CA	Marriot	Scripps Clinics & Res Fndtn
6/96	Modesto, CA	Modesto Hilton	Gould Medical Center
9/96	Vancouver, WA		Clark United Providers
12/96	Riverside, CA	Mission Inn	Loma Linda Medical Center
3/97	Oakland, CA	Waterfront Plaza	Hill Physicians Med Group
6/97	Los Angeles, CA		Optimatrix/Cedars Sinai
9/97	Las Vegas, NV		South West Med Associates
12/97	Whitter, CA	Whitter Hilton	Integrated Medical Mgmt
3/98	S. San Francisco, CA (SFO)	Embassy Suites	UCSF Stanford Health Care
6/98			
9/98			

12/98	Oakland, CA	Waterfront Plaza	
3/99			
6/99			
9/99			
12/99			
3/00	San Diego, CA	Hilton Mission Valley	Scripps Clinic
6/00	Pasadena, CA	Pasadena Hilton	USC Medical Group
9/00	Eugene, OR	River Inn	Peach Health
12/00			
3/04	Phoenix, AZ	The Scottsdale Plaza Resort	MedPro
6/04	Sacramento, CA	Marriott Hotel and Resorts	Sutter Connect
10/04	Ontario, CA	Ontario Airport Hilton	
2/05	San Diego, CA	Town & Country Resort	
6/05	San Jose, CA	Hyatt Sainte Claire	
10/05	Vancouver, WA	Hilton	
2/06	Anaheim, CA	Paradise Pier Hotel	
6/06	Seattle, WA	Sheraton Bellevue	Hayes Management
10/06	Tucson, AZ	Omni Tucson National Golf Resort	UPH
2/07	Costa Mesa, CA	The Westin South Coast Plaza	GE Healthcare
6/07	San Francisco, CA	Hyatt at Fisherman's Warf	UCSF
10/07	Sacramento, CA	Holiday Inn Capitol Plaza	Sutter Connect
2/08	Mandalay Beach, CA	Embassy Suites	Sansum Clinic
6/08	Bellingham, WA	Best Western Lakeway Inn	Peace Health
10/08	San Diego, CA	Town & Country Resort	
2/09	Pleasanton, CA	Four Points Hotel Pleasanton	
6/09	Los Angeles, CA	Radisson Hotel Los Angeles Westside	USC
2/10	San Francisco, CA	Hyatt at Fisherman's Warf	UCSF
6/10	Tucson, AZ	JW Marriot Starr Pass Resort & Spa	UPH
10/10	Anaheim, CA	Paradise Pier Hotel	Hayes Management Consulting
2/11	Seattle, WA	Sheraton Seattle	CureIS
6/11	San Diego, CA	Westin Gaslamp Quarter	Sharp Healthcare
10/11	San Francisco, CA	Hyatt at Fisherman's Warf	Brown & Toland Physicians
2/12	Anaheim, CA	Disneyland Hotel	St. Joseph Heritage Healthcare
6/12	Tucson, AZ	JW Marriot Starr Pass Resort & Spa	University of AZ Health Network
10/12	Palm Springs, CA	The Westin Mission Hills	Loma Linda University Health System
2/13	Long Beach, CA	St. Mary's Cruise Ship	HealthCare Partners
6/13	Sacramento, CA	Embassy Suites Hotel	Dignity Health Medical Foundation
10/13	Newport Beach, CA	Hyatt Regency	University of CA, Irvine
2/14	Las Vegas, NV	Westin Lake Las Vegas	HealthCare Partners NV

8/14	La Jolla, CA		Telavox
2/15	Los Angeles, CA	Universal City	DaVita HealthCare Partners
8/15	Seattle, WA	Sheraton Seattle	Pacific Medical Centers
2/16	Sacramento, CA	Embassy Suites Hotel	Dignity Health Medical Foundation
8/16	San Diego, CA	Paradise Point	Sharp Healthcare

Year	IDX Branch Manager, San Francisco Office
1990	Jeannie Watson, Kathy Markow
1991	Kathy Markow, Rob Culbert
1992	Rob Culbert
1993	Rob Culbert, Mark Branning
1994	Mark Branning
1995	Mark Branning
1996	Mark Branning
1997	Mark Branning, Julie Haas
1998	Julie Haas
1999	Julie Haas
2000	Julie Haas