



## **Road Map to a Successful EHR Implementation**

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Implementation of an EHR can be a daunting task for all involved. But if you have a road map in place from beginning to end, everyone will know his/her part and see the route to the final go-live stage. Add clear, task delegation from the team leader that each team member follows, along with contingency plans for the “unexpected”, the “what if’s” and the “maybe this might happen” detours, and everyone will arrive at the final destination together.

What follows is a navigator’s checklist that can guide you down the road to a successful EHR implementation. Happy motoring! Remember to top your tank with plenty of patience.

### **EHR Implementation Checklist**

#### **Establishment of Project Team:**

- \_\_\_ Select provider champion(s)
- \_\_\_ Identify project manager
- \_\_\_ Assign additional practice/department champions
- \_\_\_ Enlist subject-matter experts

#### **Development of Project Plan:**

- \_\_\_ Schedule/timeline Implementation
- \_\_\_ Assign roles and responsibilities among team members
- \_\_\_ Change-management process
- \_\_\_ Issue tracking-and-management process

#### **Communication**

- \_\_\_ Schedule regular meetings with vendor implementation staff
- \_\_\_ Provide staff with regular updates
- \_\_\_ Post implementation timeline in break room and mark subsequent progress
- \_\_\_ Exploit newsletters, email, etc., to address specific topics or issues

#### **Mapping of Critical Practice Workflows**

- \_\_\_ Identify problem areas and bottlenecks
- \_\_\_ Remap practice workflows, incorporating HIT

#### **Handling of Existing Data**

- \_\_\_ Identify key information and documents that need to be in system
- \_\_\_ Develop plan for entering these documents into the system
- \_\_\_ Develop plan for handling new, outside documents and information

## **Training**

- \_\_\_ Assess PC and keyboarding skills of staff
- \_\_\_ Establish plan for developing staff's PC and keyboarding skills
- \_\_\_ Conduct hands-on, task-oriented sessions tailored to staff responsibilities
- \_\_\_ Identify "super-users" and ensure they receive additional training sessions
- \_\_\_ Allow staff on-the-job learning time to effectuate system familiarity
- \_\_\_ Develop appropriate education material, such as cheat sheets, quick references and diagrams of new workflows

## **System Testing**

- \_\_\_ Conduct testing of modules and their integration with other systems

## **Contingency Planning**

- \_\_\_ Develop disaster recovery plan
- \_\_\_ Test ability to restore system from backups prior to going live
- \_\_\_ Ensure a system backup plan is in place and running

## **Go-Live Planning**

- \_\_\_ Determine amount providers' schedules will be reduced (if at all), allowing time during the day for providers to "catch up"
- \_\_\_ Determine rollout approach (all at once or in stages)
- \_\_\_ Ensure sufficient resources available to support staff and providers
- \_\_\_ Make sure staff and providers know whom they can go to for assistance
- \_\_\_ Inform third parties and other vendors (e.g., labs, imaging) of go-live date so they are prepared to provide additional support
- \_\_\_ Plan what to do if things go *really* wrong
- \_\_\_ Schedule midday "huddle" to evaluate progress
- \_\_\_ Schedule end-of-day debriefing to identify and address issues
- \_\_\_ Plan a celebration

If you would like more information on implementation preparation or other systemic EHR processes that VCS can help you with, please contact us at 610.444.1233 or [vcs@getvitalized.com](mailto:vcs@getvitalized.com). Helpful information also resides on our website, [www.getvitalized.com](http://www.getvitalized.com).