EHR IMPLEMENTATION
6 STEPS TO SUCCESS

Your six-step guide to successfully implementing EHR software

GUIDE HIGHLIGHTS

- Creating a change management plan
- Identifying and migrating valuable system data
- User training, system testing, managing go-live & more

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INTRODUCTION

Implementing a new electronic health record system takes planning, coordination and collaboration amongst many levels of personnel within a medical practice. Implementation of a chosen EHR system will require just as much effort as the process of choosing what system to purchase.

The number one priority in implementing a new EHR system is proper and thorough planning. Planning and preparation will ensure proper training, merging of existing charts, as well as increase user buy-in. It is imperative that you present the new system with confidence, passion and enthusiasm. If you are not seen as convinced that the new system will bring great change and ease in documentation, then it will be difficult for your clinicians to get on board.

A CHALLENGING TRANSITION

It is important to recognize early that implementing a new EHR system will come with many challenges, some of which can be expected and some of which will be difficult to prepare for. You must expect some resistance, especially from clinicians that are "set in their ways" or are hesitant to change. A clinician transitioning from paper charting or one that is learning a new EHR system will need time to become proficient in the new system.

It may be difficult to fully prepare for the unexpected challenges, such as increased time for training or unexpected technical issues. Time will likely be the greatest resource that is "lost" during the implementation period. The good news is that with proper planning, training and staff support, implementing your new EHR system can be done successfully.

This whitepaper will guide you through the process of implementing your EHR by looking at the initial process of preparing your team for change, your data migration, training, the actual go-live and beyond. All of these steps are created to offer the best chance of implementation success.

1. CREATE A CHANGE MANAGEMENT PLAN

Change management is the first stage to a successful implementation of a new EHR system. It is the basic principle that underlies all phases of implementation, and helps to ensure Meaningful Use compliance, alongside real and sustainable practice transformation.

At its core, EHR change management allows staff to embrace the new software, but change is not easy. Change can be especially difficult for a large practice setting with many healthcare departments that are set in their own ways. In addition, many practices have several leaders, overseeing different roles. It is essential that all leaders have a shared vision for the practice and for the new EHR system.

THE FIRST STEP

The first step to bring about successful change, is to assign an EHR project manager within the practice. This individual must be someone that is well respected across all different departments. This point person will likely be a physician, nurse or practice manager that others listen to. They should be someone that was involved in the EHR selection, and must know how to properly convey the changes that will soon come. Their role will be to build excitement and acceptance around the new system.

The project manager must hold a practice-wide meeting to introduce the new system and provide a timeline for implementation of the new system, with the following included:

- Data transfer
- System testing
- Key training dates
- Go-live

This will allow busy staff time to adjust to the idea of change, and to make time in their schedules for any training required. In addition, it will allow them to visualize how the system will impact their own job, both during implementation and longer term.

EXPECT RESISTANCE

It is important to expect resistance when introducing such a large change, but clear and open communication will improve buy-in. Reasons for resistance will include:

- **Complacency:** it has always been done this way
- **Resistance to technology:** some people are afraid of technology, don't feel like learning something new, additional responsibility
- **Overworked/over-scheduled staff:** they cannot keep up with their own job duties, let alone learn a new system
- **Poor work morale:** hearsay can lead to resentful staff, feeling as if the change is to increase the administrative bottom line

It is therefore important to convey the benefit of a new EHR for each level of personnel clearly:

- **Administrative** staff need to understand the return on the investment. These returns include improved efficiency of practice systems and processes, more streamlined billing and collections, as well as cost avoidance through compliance alerts and billing coding.

"The first step to bring about successful change is to assign an EHR project manager within the practice"

- **Clinicians** need to understand that they will be able to deliver improved patient care with less cumbersome billing and streamlined visit notes.
- **Patients** will have expanded access to their health information and there will be better communication between clinicians and patients. In addition, patient outcomes are more easily tracked and automated.

Keep communication open during EHR change management and you will achieve greater user buy-in. Practice staff need to approach EHR implementation with a positive attitude for successful training and utilization.

2. IDENTIFY AND MIGRATE VALUABLE DATA

Migrating data from the old system to the new EHR system is critical for successful implementation in your practice. Without proper input of existing patient data, your clinicians will not be able to access medical health records, lab values and other necessary tests. Proper data migration reduces clinician frustration and improves the user buy-in to your implementation.

The data migration process is usually easier for practices that are moving data from one electronic system to a new EHR system, since most of the information is already in electronic form. However, for practices that are moving from paper charting to electronic systems, much of the entry is done manually and can be very time consuming. There are strategies that should be taken to ease this process:

DEFINE YOUR MIGRATION PARAMETERS

Many offices hold years of patient records and files. You must determine what exactly you would like input into your system. How many years or months do you need backed up into the system. Do you only input current patients into the new EHR system and refer to paper charts for past clients? In addition, do you enter each client by hand, or do you simply scan past tests/imaging into the system?

"Without proper input of existing patient data, your clinicians will not be able to access medical health records, lab values and other necessary tests"

By determining exactly what you need, you will be able to concisely narrow down what needs to be input. Begin with today's date and move backwards. Likely, patient records from five years ago will not need input into your new system. Think about how often you have accessed historical records in the past and prioritize. Remember to account for your "frequent flyers" - those patients who come in and out of your office regularly.

TRAIN DATA ENTRY STAFF CORRECTLY

Determine who will be the point person for inputting past records into the new system. Be sure to allocate plenty of time for this project, as their other work duties will be stalled. Create a workflow sheet for unmistakable clarity as to data entry requirements. Once you have determined who will take on this task, ensure proper training so that person knows what documents are important. Typically, this person will be an office manager, receptionist, or assistant, as your clinical staff will not have time.

CHECK AND DOUBLE CHECK

Ensure that all patient information is input correctly and do not shred anything for several months. You want to ensure that your new system is properly running and that you have all necessary information. Once you are confident that all necessary data has been transferred, you can properly store away or destroy old charts.

STORE PAPER CHARTS SECURELY

Look at your practice regulations in regards to the required time to store medical records and information. Some records will likely need to remain in storage for access at a later date.

There will likely be other areas crucial to your practice conducting a successful EHR data migration. But by considering these four tips when planning for your data migration the odds should be stacked in your favour for a successful implementation.

3. CONDUCT PRACTICAL EHR TRAINING SESSIONS

Once you have your team prepared for the change, the time will come to look at the training aspects of your EHR implementation process. This is a crucial step in getting your staff to buy into the new system, so you'll need to dedicate a significant amount of thought to how best to proceed.

CREATE AN EHR TRAINING TIMELINE

Thorough and comprehensive training will help your practice avoid setbacks and errors, reduce employee frustration and decrease employee turnover. Without proper training, the EHR system will not be used to its fullest capacity. Create a training timeline, for which you can set short and long term goals for training completion.

"It is important to properly assess your clinicians' current skill level and comfort with computers, especially for those that are transitioning from paper charts."

If relying on in-person training, plan multiple training sessions and set aside time in staff schedules for these. By dedicating specific time slots for training, you will achieve greater concentration from the staff.

TARGET TRAINING TO USERS' SKILL LEVELS

It is important to properly assess your clinicians' current skill level and comfort with computers, especially for those that are transitioning from paper charts. Determine if your staff are computer-literate or if they need additional training. If your budget allows, seek out additional basic computer training for those clinicians that are less tech savvy.

CREATE AN EHR TRAINING TEAM

Designate a super user, or several, depending on your practice size. Allocate an individual in each department that has a more comprehensive understanding of the system. This person will likely be very tech savvy and will be provided additional training. This way, your clinical staff members will have a person to reach out to in their own respective departments. Identify leaders in your practice who will be called upon to mentor and train new staff.

TAILOR TRAINING TO DIFFERENT DEPARTMENTS

Train only what each department/clinician needs to know. Trying to train the entire staff on all aspects of the new EHR system is a waste of time and resources. If an evaluating physical therapist needs to know how to document initial evaluation findings and a physical therapist assistant only needs to know how to write a daily note, then save time by only including the physical therapist in the evaluation documentation training. Too often, practices make the mistake of training staff in areas that aren't necessary. By focusing training strictly on need to know areas, there will be less confusion and greater attention paid to the training session.

WATCHING IS TOO PASSIVE. ENCOURAGE ACTION

Allow staff to follow along with training in real time. Each staff member should be seated with a computer to follow along with the instructor or superuser. Provide each clinician a cheat sheet or reference page as well. By inputting data and selecting patient records along with the instructor, they will better remember their training. All instructions should be written out for later reference. By providing all instruction on a written reference page, clinicians will be able to follow along and 'do' instead of just watching.

When it comes to EHR training, use the resources that your EHR vendor provides. Training does not stop with one, two or even ten training sessions. Select a good EHR system with a good support package and it will pay off in the long term.

4. COMPLETE 'REAL-WORLD' TESTING

By the time you are ready for testing the integration of your system into your practice (before your go-live launch), your staff should have completed all the required training for their roles and you should have migrated all relevant patient data. This will allow you to test the system in as 'real-world' environment as possible before the go-live.

THE IMPORTANCE OF EHR TESTING

You should have established new workflow processes so that each individual and departments knows their responsibilities in regards to patient input, clinical documentation, billing, scheduling and patient follow up. It is critical to thoroughly test your EHR implementation before you face real, live patients. Thorough testing will ensure that all processes are running smoothly and will allow you to identify areas of confusion or fall-out that will likely arise.

It is much better to test and retest without real patients to avoid patient, clinician and administrative frustration. This will help to ensure a successful go-live. Assign testing to staff that have been involved in creating the new EHR workflows and have great attention to detail. You want your staff to find issues or breakdowns in the system to correct them before the system goes live.

"It is critical to test your EHR implementation thoroughly before you face real patients"

TEST PATIENTS

Your EHR system should allow you to create 'test' patients in order to practice every aspect of clinical documentation, billing, ordering prescriptions, printing patient education handouts, scheduling etc. Create a patient case scenario that you are comfortable and familiar with - for example a wellness visit for 80 year old man. Test the system by inputting every component of documentation that would be required for a real patient, from demographic input and initial review of medications to e-prescriptions and future appointment scheduling.

REAL-TIME EHR TESTING

Next, take this testing a step further. Use a staff member to represent a real patient. Take each individual in the department and have them execute their role in seeing the patient. The receptionist will gather their identification and consent forms, and input the information into the system. Have the nurse gather their history, vitals and input all necessary information. The physician should perform their physical exam and input their data. Follow through with plan of care and scheduling. By testing the system in real time, you will have a greater indication of the potential gaps in understanding or workflow.

Of course, after you have identified any areas of discontinuity, you can work to actively correct the issues. You may need to implement more training or consult with the EHR vendor. After correcting the issues, retest. Then retest again. You should retest until you find no further issues. Then, you can present your successes to the administration and senior management. Your practice can be confident that you are ready to go-live.

5. CLEARLY COMMUNICATE YOUR GO-LIVE PLAN

After thoroughly testing your EHR software, you will have a good idea of the confidence and proficiency with which your staff can use the new system. You will have established workflow processes and each staff member will know their role in the implementation of the new system.

Once you have presented your testing, modification and retesting outcomes, you should be ready for the moment you have been waiting for - your EHR go-live.

ALLAY STAFF ANXIETY

Your go-live date may come with some anxiety from your staff because all of their training will be put to the test, in front of real patients. It is important that administration and management put their nerves at ease by providing support, encouragement and recognition of a job well done.

Your management, office and clinical staff must therefore be prepared to be flexible and to troubleshoot on the spot. Ensure that your super users and administrative managers are on site during your launch with real patients. You must keep a sense of calm in the clinic during EHR go-live in order to reduce staff anxiety and patient frustration.

> *"It is essential to inform patients that you are implementing a new EHR system"*

Over the first few days of implementing the system, keep the work schedule and extra duties to a minimum. Concentration should be on the new EHR system. Decrease patient caseloads for clinical staff in order to ensure proper input of medical data and care plans. Give the administrative, clinical and office staff time to adjust to new workflows and processes.

When staff members become overwhelmed, they are more likely to become frustrated and lose interest in mastering the new system. Acknowledge that learning a new system takes time and the best way to learn is by making and correcting mistakes.

KEEP PATIENTS INFORMED

It is essential to inform patients that you are implementing a new EHR system. When calling to confirm patient appointments, let them know that you are in the process of EHR go-live. Educate them on the benefits of improved patient care, improved communication and medical record management. If they are aware of the transition, they will likely be more understanding of minor hold-ups or technical difficulties during their office visit.

Patients understand that change and technology can come with a fair degree of frustration. The mistake comes when patients are kept in the dark and unaware of the project your practice is working on. If they do not know what is going on, they will be more likely to become frustrated and blame staff that “don’t know what they are doing.” Avoid this frustration by being upfront about the practice transition.

The most important thing to remember is that despite months of planning and training, your EHR go-live date will come with at least a few hold ups. Because so many people are involved in the implementation of an EHR system within a practice, not every patient encounter will go smoothly. The good news is that each patient encounter will be a new learning experience, allowing your staff to further master the EHR system.

6. ADDRESS POST GO-LIVE CHALLENGES

Going live with your EHR system is only the beginning of your real life implementation into your practice. Often, post go-live work requires just as much effort as all of the training and planning prior to launch.

Recognize that EHR implementation is an ongoing process that continuously evolves as you learn new features and implement efficient systems into your practice. Areas that you can expect to encounter post go-live challenges include:

PATIENT SATISFACTION

Although most patients will be understanding of a glitch in usually-smooth smooth operations, they will likely have little tolerance for ongoing chaos. Therefore, it is essential that your administrative team pays great attention to patient satisfaction through verbal communication or patient satisfaction surveys. Keep your focus on optimal customer service and patient satisfaction to reduce frustration post go-live.

"It is important to set reasonable expectations to restore normal patient caseloads, despite implementation of a new documentation system"

REGAINING PRODUCTIVITY LEVELS

During the initial week of EHR system launch, you can expect that productivity will be low. However, it is important to set reasonable expectations to restore normal patient caseloads, despite implementation of a new documentation system. Remind staff and clinicians that the new EHR system is designed to improve productivity, so reasonable expectations must be set in order to keep the business running.

PATIENT COMMUNICATION

Patient communication systems must be in place to ensure that patients are receiving necessary phone calls after lab-work or imaging studies are done. Ensure that alerts are given to the clinicians, nurses or practice managers so that the patient is not left waiting on test outcomes. When implementing a new system, patient communication can be impacted, so it's important to heave measures in place to deal with this.

FOLLOW-UP TRAINING

Post EHR go-live, your staff and management will likely identify areas that are not running as smoothly as they should be. These areas are likely responsibilities or systems that will require further training. Identify all areas of concern and determine what department or individual will require further training. It is best to provide additional training early on, instead of waiting around for continued mistakes.

EHR OPTIMIZATION AND IMPLEMENTING ADDITIONAL FEATURES

Once your day-to-day operations are running smoothly, you can focus on optimizing your data collection, reporting, billing and operations. Identify areas further improving practice efficiency and complete an additional course of training for your staff. Use the services and support of your EHR vendor to educate your users on additional features. These will likely be targeted toward your administration, billing and scheduling departments.

Remember to keep the lines of communication open between your staff and management team. Keep at least one individual assigned as the point person for EHR contact, training, and troubleshooting. This way, your users will feel they have the support and resources to perform their job duties optimally.

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