How to Implement an EHR

Recommendations, advice and best practices for a successful EHR implementation

WHITE PAPER

Presented by

Greenway
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Practices are finding it difficult to maintain profitability and patient volume because of increasing regulatory requirements and decreasing reimbursements. With the right tools and planning, however, your practice can take advantage of value-based payment models, grow profitably and give clinicians more time to do what they do best — care for patients.

Preparing for the future with an EHR

Implementing an electronic health record (EHR) is one way to prepare your practice for the future and participate in programs such as PCMH, ACOs, PQRS, meaningful use and population health. Because implementing an EHR affects your entire organization, proper planning and education are vital to eliminating headaches as you prepare your practice to thrive in a post-fee-for-service environment.

Choosing the right EHR is an important part of that preparation and a critical decision for your practice. This guide will help you navigate the EHR selection and implementation process so your practice can transition smoothly. Dozens of interviews were conducted to obtain three unique and important perspectives. This guide shares lessons learned, recommendations and expert advice from those who live and breathe EHRs on a daily basis — EHR users, consultants and trainers.

Lessons Learned: Users’ Perspectives

Regardless of which EHR a practice chooses, most practices struggle with the change. Tenured staff members may be set in certain patterns and have to re-train with new processes; other staff members may not be familiar with computers at all.

To create this guide, 17 Greenway customers were interviewed and all acknowledged that as with other major operational changes, implementing a new EHR can be daunting. We compiled their lessons learned and real-world transition experiences into the recommendations below.

1. Choose a long-term partner, not a vendor

Select an EHR partner with the flexibility to change with your organization and the continuously evolving healthcare industry. Partner with a company with similar philosophies and corporate culture to your own, and that enables your organization to keep practicing medicine according to your best practices and treatment philosophy.

The EHR solution should work for your organization, not the other way around. An innovative EHR partner is receptive to customer feedback and product-enhancement requests to make the solution better suited to practice needs.
Look for a long-term partner with a responsive support structure to assist before, during and after implementation. Once your team narrows the selection down to two to three companies, plan site visits to determine the best choice for your organization.

2. **Determine criteria most important to you in an EHR partner**

Determine which features are important to you in an EHR solution and find solutions that match your requirements through the vetting process. Decide which EHR platform offers all of the tools you need.

If you are currently using an EHR, apply your experience with it to the selection process for your new system. Learn from previous experiences and know what you are not looking for.

Most importantly, select a system that offers an easy platform for providers to learn and navigate. Create a questionnaire to send to providers asking for their specific requirements and requests. Ease of use for providers is key to successful EHR implementation and the realization of long-term benefits.

3. **Staff engagement and alignment increase morale**

It’s important to establish staff alignment when selecting and implementing an EHR. Involve key staff members from different departments in both the selection of the system and the creation of workflows and processes during implementation.

Staff alignment and buy-in reduces resistance and increases morale during implementation. This results in better product knowledge and improved patient care. Greenway customers agree that when key staff members are engaged from the beginning, they are happier and would never go back to paper or the previous EMR/EHR system.

4. **A learning curve exists with any system**

With all EHRs, staff needs training to become experts. Begin training with practice management to get everyone familiar with scheduling and tracking patients through the system. The clinical implementation will go more smoothly when staff can see the overall picture.

Try to make the transition as fun as possible. Create a special “EHR Go-Live Day” by bringing in lunch and allowing for casual attire, for example. Having fun makes a go-live more of a celebratory event and less of a stressful change.

Keep the goal in mind. An EHR isn’t just about making the daily job easier for physicians and staff. It’s also about helping you provide the quality care and documentation needed for improved population health.

Physicians and staff may resist change in the beginning, but if you focus on long-term goals the advantages of the EHR will become much clearer — having immediate access to a patient’s complete record from virtually any location,
in addition to more-accurate coding and improved workflows. A few weeks or months after go-live, staff will be encouraged by their personal progress using the EHR and the system’s benefits to patients.

5. Create a super-user team
Form a core “super-user” team that includes physician champions. This team can help struggling staff members, improve provider use and teach others the most efficient ways to use the system.

It’s important for the team to determine staff members’ goals in the beginning. For instance, if a provider’s goal is to document all of her patients in the EHR after three months, encourage her progress and recognize her achievement when she meets her goal.

Send the core team to super-user training. Having an on-site team that thoroughly understands the system and can help train staff and answer questions. This will enable staff to practice using the EHR between training and go-live and to ask questions when necessary. This team is essential in taking internal ownership for the implementation and training of future staff members.

6. Keep staff updated with all workflow changes
Rethink processes and workflows throughout implementation and make changes according to what makes the most sense. As the staff uses the EHR more frequently, they may find shortcuts or workarounds that improve their personal or team workflow. The super-user team should meet regularly to determine modifications that increase efficiency.

Remember to communicate with staff frequently about changes or updates. Choose the methods that work best for your organization. Consider using an online staff portal, regularly sending email communications to staff members, and holding quarterly office manager meetings and luncheons.

Recommendations: Consultants’ Perspectives

The health information technology (HIT) consultants interviewed often work with a multitude of healthcare organizations and EHR solution companies. Below is advice for effectively managing the EHR implementation process at your organization from an HIT consultant’s perspective.

1. Single resource leader and point of contact
A resource leader at your organization is critical to a successful EHR implementation. This point person is often a staff member with strong management abilities and enough time to allocate to the project. This person will be the main contact between your EHR vendor and your staff, and will play a significant role in helping align all things surrounding the EHR implementation.

Once the point person is selected, he or she will work closely with the core super-user team to maintain quality and standards within the organization.

2. Establish clear and measurable project objectives
The main goal of an implementation is to begin using the EHR quickly and successfully, but you also need to identify long-term organizational goals. Establish clear objectives at the beginning of the project and measure performance metrics during and after implementation.
Once the project objectives and milestones are created and objectively evaluated, determine any changes needed. This process will allow the resource leader to constantly evaluate progress during the EHR implementation and make changes accordingly.

3. Create detailed, flexible project plans

Collaborating with your vendor-appointed project manager to create a detailed project plan and implementation timeline can help you manage the many moving parts of an EHR implementation.

During or shortly after the sales cycle, your project manager will work with you to create a practice-specific implementation plan based on EHR implementation best practices. This plan typically includes:

- Project planning
- Workflow analysis
- System building
- Training and testing
- Go-live and adoption
- Optimization

At each phase of the project, the super-user core team should document and communicate best practices to staff.

It’s typically the organization’s role to identify which staff members will complete the implementation process, based on number, type and skill needed. Remember to coordinate schedules with the project manager for effective participation.

**Advice: Trainers’ Perspectives**

Rarely is an implementation perfect, but knowing what to expect can help prepare you for change in your organization. The following are best practices from Greenway implementation specialists and project managers — those who are “in the trenches” training and overseeing implementations on a daily basis.

1. Choose your core super-user team carefully

As recommended by customers above, identifying a core user team is vital to successful implementation. Be sure to select individuals for the core team who understand the organization’s culture and accurately represent a cross-section of the entire staff, including clinical representatives.

Each member of the team should be empowered to attend all training sessions, set policies around the workflows created, dedicate significant time to the project, understand the requirements and speak on behalf of the entire organization. Throughout the implementation process, these key people should balance workloads among staff and act as leaders, motivators and confidantes.

2. Set expectations ahead of time

Setting clear expectations early on will help ensure a smooth implementation. Discuss these expectations with your EHR partner and communicate them to your staff through the core team. Be specific and include a detailed implementation timeline, training logistics and internal core team selections.
Make a point to identify project owners and clearly define organizational goals. Share advantages of the transition to anyone who is resistant. What is one benefit to your patients that will resonate with that person? For example, a provider may want to identify every female patient over age 40 who has not had a mammogram.

Showing staff how to accomplish their goals in the EHR and setting realistic expectations in the beginning will spark enthusiasm and discourage bad attitudes that can inhibit success.

3. Perform a mock go-live

It’s essential to practice with patients before both the practice management and clinical go-live dates. Fictional “test patients” can be put on the schedule and worked through from check-in to check-out. We recommended that providers see one to two patients per day during a mock go-live. It’s also a good idea to set up space where staff can practice workflows or watch vendor training videos before the go-live.

4. Communication is key

Consistent communication is vital to helping ensure that all elements of implementation run smoothly. Develop a process for the core super-user team to identify what works well and what needs to be improved.

Depending on circumstances, the core super-user team or resource leader should conduct daily and/or weekly debriefing calls with all parties involved and distribute action plans and documentation as needed.

5. Facilitate tests for interfaces and migration

Clinician and administrative staff involvement during implementation is imperative to building proper EHR infrastructure.

Make sure to test your technology in the beginning to ensure that everything is working correctly. Example test scenarios include identifying change processes, building scenarios for interfaces, and performing a test data migration.

Learn more

EHR implementations are not simple — but the insights shared above will help ease your EHR selection and implementation. Please visit the following sites to learn more about PrimeSUITE®, Intergy EHR and other Greenway solutions that can help you improve clinical, financial and administrative outcomes across your practice:

– Our website: www.greenwayhealth.com

– Information about PrimeSUITE, Intergy EHR and related Greenway solutions

– Industry issues and trends that affect you, and how we can help you successfully navigate the future of healthcare

Email us at info@greenwayhealth.com if we can be of assistance at any time.

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