A step by step guide

TO A SMOOTH TRANSITION TO YOUR EMR SYSTEM.

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CHECKLIST #1
10 Key Steps for Implementing an EMR System

You've done your research, narrowed down your options, and finally purchased an EMR system from the vendor that best fits your business.

BUT WHAT NOW?

1. Start by ordering any necessary hardware or software that is needed. Did your vendor send you specifications for a new server? Did they discuss network security, firewalls, or backups with you? This is the time to order all of this equipment and have it installed (and tested) by your local IT provider.

2. Upgrade your internet connection (if needed). Did your EMR vendor recommend a minimum bandwidth (speed)? If you're using any cloud services or offsite backup, this step is CRUCIAL.

3. Setup the necessary connectivity for your EMR system. Your new records system will need to link to pharmacies, labs, and imaging systems to name a few required connections. Your IT partner will make sure that everything is talking to your records system the way it needs to. This step is why a good IT partner is so important.

4. Conduct a workflow assessment. While your vendor works on connectivity, you should be studying what your new digital workflow will look like, and creating a plan of action (many good EMR systems will help with this or send a template to help you get started). You don't want to be retooling your workflow while your employees are relying on it for patient care.

5. Produce document templates. Templates are essential for documenting patient care. Most electronic health record systems lack out of the box templates for certain conditions. Identify your needs for patient documentation templates (such as the conditions you see most frequently) and focus on developing those templates if your system doesn't come with them. Make your system work for you, not the other way around.

6. Set up training goals. As you assess your workflow, pay attention to areas that will require training. Know who gets what training, when they get it, and how long it will take to complete. Make sure you schedule training BEFORE you go-live with your new system. Training will include instruction in patient data security requirements, which leads us to step 7.

7. Establish security policies. Make sure you implement security before any real patient data is added to your EMR system. This is an area where your IT partner will play a critical role. They should have the ability to set up all HIPAA mandated security measures.

8. How's your HIPAA? IT service providers are experts at making systems meet the necessary HIPAA security requirements. Rely on your IT provider for this step and ensure that all requirements are met. HIPAA compliancy is an important part of meaningful use, but it warrants its own step here. Remember that HIPAA doesn't end once the system is set up. You must actively work to keep staff trained on the latest HIPAA Privacy and Security measures.

9. Commit from the top down. As a leader of your practice, you need to demonstrate your commitment to training and data security. You also must establish a firm grasp on the intricacies of your medical record system. Your action, knowledge, and can-do attitude will create an environment that generates success.

EMR IMPLEMENTATION CHECKLIST PT. 2
Common Issues Checklist

Setting up your EMR can often feel like navigating a maze. If you don't have a map that highlights the location of traps and dead-ends, you risk confusion, delays, and ultimately an unsuccessful EMR implementation.

Here is your map. We have been through the EMR implementation maze with many of our clients before, and we've experienced first-hand the mistakes clinics make when implementing their EMR system.

STAY AWAY FROM THESE 5 HARMFUL SHORTCUTS.

1. Clinics often fail to map workflows prior to the go-live date. Workflows are imperative to a productive clinic. Without them your staff will experience frustration and confusion. What's more, your patients will feel the inefficiency and become dissatisfied with the level of care you can provide.

2. Practices may neglect to plan around training. Consult your IT service provider or vendor for an estimate on training duration. Be careful with the timing of your training sessions once you have a timeline in hand. Don't start your training too far in advance or your staff may forget what they learn by the time you go live. Beware of training too late as well. Don't rush your training sessions.

3. Clinics fail to migrate necessary data from paper records into the EMR. Ensure that your legacy data is searchable and accessible. Resist the temptation to scan paper charts in their entirety. Scanned information may be difficult to find in an EMR (depending on the vendor you have chosen).

4. Clinics often do not build, test, and implement essential interfaces for labs and imaging. Do not go live without a fully functional lab interface. Failure to complete and adequately test data interfaces results in "work-arounds" that waste valuable time and money.

5. Do not go live all at once. Clinics that see the most success with their EMR go live one team at a time. A staggered start allows ample time to address issues and problems that may arise. If you have to go live all at once, make sure EVERYONE has been trained (especially the doctors).

This bonus tip isn't as much of a mistake as it is a good practice:

6. Pay extra attention to employees who are "technophobes" or even self-professed luddites. Your employees must have a basic level of computer aptitude if they are to have success working with an electronic records system.

READ ON FOR A LIST OF 3 EMR IMPLEMENTATION BEST PRACTICES.

3 Best Practices for EMR Implementation

1. COMMUNICATE CONSISTENTLY.

Your EMR partner and your in-house staff should be kept in the loop regarding all EMR work-flow changes. Send emails, hold periodic meetings, or host small luncheons to catch everyone up on changes. An online staff portal is another great place to share information if you have a larger office.

Allow your staff to inform you about shortcuts or workarounds that they discover in their day-to-day use of the EMR. You can use their feedback to increase efficiency in the future.

2. ESTABLISH CLEAR AND MEASURABLE PROJECT OBJECTIVES.

At this point you probably just want to get your EMR up and running. This is a great end goal, and it's what this checklist is intended to help you with. However, you also need to identify long term organizational goals.

This doesn't mean that you should only have long term goals. We encourage you to establish clear objectives to complete during and after your EMR switchover project.

3. PERFORM AN EMR DRESS REHEARSAL.

In the interest of time, you may be inclined to skip this step and get right to flipping all the switches. The time to flip switches will come soon, but you should be able to do so knowing exactly what to expect.

Fictional test patients can be put on the schedule and worked through from check-in to check-out during this rehearsal time. Providers should practice working with one or two fictional patients per day in your EMR system. By practicing in this way, providers know exactly where to go for information. This eliminates any embarrassing confusion that might crop up when a real patient is waiting for care. Keep a few fictional patients in the database even after you go-live to test new scenarios you may run into after you begin using the system.

Call today for a consultation with one of our HIPAA experts or EMR experts.

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