As an independent non-profit corporation, The Carolinas Center for Medical Excellence (CCME) will provide leadership, education and services to promote improvement in the quality and cost effectiveness of health care.

Planning Your EHR Implementation
Webinar Schedule

• Planning for your EHR Implementation – October 27 and 30
• Selecting your EHR – January 26 and 29
• Successfully Implementing your EHR – February 23 and 26
• Optimizing your EHR for Quality Improvement – March 23 and 26
Looking for More Information?

- CCME EHR Adoption Workshop Series
- Live, comprehensive, 6-part series on each phase of EHR adoption
- Limiting series to 40 participants
- Series starts December 11 in Raleigh, NC
- Contact EHRservices@thecarolinascenter.org for more info and to register
Session Objectives

• Develop specific, measurable goals for EHR adoption and quality improvement
• Formulate strategies for staff communication and change management
• Develop strategies for meeting the proposed meaningful use criteria
• Create a practice specific workplan for the EHR implementation
• Formulate the specific features/functionality that the EHR must have to be successful
Why Promote EHR/ HIE?

Effective EHR/HIE Implementation will:

• Improve patient quality of care
• Prevent medical errors
• Reduce health care costs
• Increase administrative efficiencies
• Decrease paperwork
• Expand access to affordable care
EHR Adoption Steps

• Pre-work
• Assessment
• Planning
• EHR system selection
• EHR system implementation
• EHR post implementation evaluation
• Clinical system improvement
Review: Pre-work Steps

1. Perform financial/ROI assessment
2. Confirm senior level commitment
3. Assign a physician champion
4. Select EHR implementation team
5. Learn to conduct effective staff meetings
6. Learn EHR hardware and software terms
7. Review recommended EHR functionalities
Review: Assessment Steps

- Perform readiness assessment
- Assess practice culture
- Evaluate the environment for change
- Assess computer skills of all employees
- Assess patient satisfaction
- Evaluate hardware and networking needs
- Perform workflow analysis
EHR Adoption Step 3
Planning Your EHR Implementation
Planning Step Includes

- Create plans: Turn assessment findings into actionable information.
- Plan for backloading and scanning paper charts
- Determine Implementation Approach
- Draft internal project plan for EHR implementation
- Define EHR Implementation goals and measurements
Step 1
Create Plans
Turning Assessment into Action

Create documented plans for:

• resource assignment matrix
• Training needs (computer skills, other)
• hardware and software needs and inventory
• communications
• Interface and conversion needs
• Functionality “wish list”/vendor selection matrix
• process improvement plans pre/post EHR
• the budget and funding sources
Resource Assignment Matrix

Plan components

• Tasks required for the implementation that require internal resources
• Resources available for implementation tasks
• “back fill” resources for staff pulled into the implementation
• Outstanding resource requirements
• Plan for acquiring additional resources
Training Plan

Plan components

• Basic computer skills and typing training needed
• Staff needing training
• Community or other resources available
• Costs associated
• Schedules for staff training
Hardware and Software Plan

Plan components:

- Detailed inventory of printers, faxes, workstations, etc
- new hardware needed (and costs)
- new network drops (if necessary)
- new electrical outlets (if necessary)
- wireless network needs including suggested placement of access points
- EHR access method (ASP, in house, hosted)
Communications Plan

Plan components

• Stakeholder communications
• Project sponsor communications
• Implementation team meeting schedule
• Staff communications
• Requirements for written v. verbal communication
Interface and Conversion Plan

Plan Components

• Detailed account of the interfaces needed including priority
• Plan for current PM system (keep or replace)
• Detailed account of needed data conversions
Functionality “Wish List”

Plan components

• Based on your assessments, what functionality is important to your practice?
• Reporting requirements
• Plan for assuring CCHIT and meaningful use criteria are included in the EHR
• Creation of a vendor selection matrix, or a list of questions that will be asked of every vendor and a method for comparing results
Process Improvement Plan

Plan Components

- Detailed account of the issues, bottlenecks, paper triggers, non-value added activities
- Based on your workflow analysis, what issues need to be addressed pre-EHR?
- Which issues can be resolved with the EHR?
Budget and Funding Plan

Plan components
- Estimated direct cost of implementation
- Estimated indirect cost of implementation
- Estimated revenue increases
- Estimated revenue savings
- Information learned from ROI calculations
- Funding plans
Step 2
Determine Implementation Approach
Approach 1—Big Bang

The Big Bang approach entails that all EHR system functions are turned on at go live and all physicians, nurses, and administrative support staff use the EHR as their sole means of documenting patient visits and performing other patient related tasks.
Approach 1—Big Bang

Pro\s
- Shorter implementation time
- Shortens painful parallel paper/EHR operational period
- Achieves return on investment much quicker
- Less likely to get stuck part way to the goal
- Takes advantage of staff enthusiasm

Con\s
- Higher risk of failure
- Significantly higher productivity hit at go live and some time afterward
- Staff or physicians unable to deal with change may rebel
- Doesn’t allow for “tweaking” the process based on lessons learned
Approach 2—Phased

The Phased approach allows physicians and staff to ease into the EHR. The office goes live with functions peripheral to the patient visit (such as messaging and prescription refills) and works toward electronic charting of patient visits.
Approach 2—Phased

Pros

• Reduces implementation pains to one group/function at a time
• Spreads out costs of hardware and software over a longer period of time
• Less risk of failure
• CAN help build support in a reluctant office
• Minimize productivity loss
• Allows time to tweak the process

Cons

• Total implementation and training costs may be higher
• ROI is not achieved as quickly
• Risk getting stuck part way to the goal
• Can be exhausting - imparts the feeling that things are always in flux
• Hybrid paper/EHR system can be confusing
Phased Approach Suggestions

Phase 1: e-prescribing, medication lists, allergies, problems lists, vitals, messaging, lab results, patient education materials

Phase 2: prompts/reminders, orders, referrals, templated physician documentation

Phase 3: advanced clinical decision support, patient health maintenance modules, chronic illness flowsheets/tracking
Step 3
Backloading and Scanning
Backloading and Scanning

• Scanning refers to the process of electronically scanning your paper medical records into the EHR.
• Backloading refers to the process of manually entering information into sections of your EHR.
Backloading and Scanning Key Considerations

• Which paper charts will be scanned? All charts? Active charts?
• What order will the charts be scanned?
• Which parts of the charts will be scanned?
• Will indexing be used?
• Which parts will be manually backloaded?
• Who will scan? Backload? And When?
More considerations

• Process for new, incoming documents?
• What type of scanner is needed?
• Enough space for a high volume scanner?
• Will scanned documents be searchable/reportable?
• Post scan paper document storage?
Backloading and Scanning Tip

If paper charts are to be scanned, you may need to develop a paper to electronic transition plan so your staff will know where to look for a patient’s chart. For example, should they look on the shelf or in the computer for the patient’s chart?
Step 4
Draft Internal Project Plan for Implementation
Hope is not a plan
Why Create a Workplan?

- Helps communicate the implementation activities to the staff
- to plan the timing of specific implementation tasks
- can be used to plan resource allocation for each implementation task
- An aid in vendor contract negotiations.
- To monitor and control the implementation
If you have a clear vision of WHEN the implementation needs to occur, you can add specific language to your EHR vendor contract to make sure the EHR is live when YOU need it to be.
# Sample Base Workplan

<table>
<thead>
<tr>
<th>Task</th>
<th>Duration</th>
<th>Start Date</th>
<th>Complete Date</th>
<th>Resource</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Milestone: Pre-Work</strong></td>
<td>14 days</td>
<td></td>
<td></td>
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<tr>
<td>Perform financial assessment/ROI Calculation</td>
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<td>Physicians, Practice Manager</td>
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<td>Assign a physician champion</td>
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<td>Physicians, Practice Manager</td>
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<tr>
<td>Select members for the EHR implementation team</td>
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<td></td>
<td>Physician Champion, Practice Manager</td>
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<td>Learn how to conduct effective staff meetings</td>
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<td>Practice</td>
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<tr>
<td>Become familiar with EHR hardware and software terms</td>
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<td>Implementation Team</td>
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<tr>
<td>Review EHR recommended characteristics</td>
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<td>Implementation Team</td>
</tr>
<tr>
<td><strong>Milestone: Assessment</strong></td>
<td>60 days</td>
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<tr>
<td>Complete readiness assessment report</td>
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<td>Implementation Team</td>
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<tr>
<td>Compile readiness assessment results report</td>
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<td>Implementation Team, CCMER</td>
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<td>Review staff computer skills</td>
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<td>Implementation Team</td>
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<td>Assess practice culture</td>
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<td>Implementation Team</td>
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<td>Evaluate the environment for change</td>
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<td>Implementation Team</td>
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<td>Assess patient satisfaction</td>
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<td>Implementation Team</td>
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<tr>
<td>Perform workflow analysis</td>
<td></td>
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<td>Implementation Team</td>
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<tr>
<td>Evaluation of hardware and networking needs</td>
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<td>Implementation Team</td>
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<tr>
<td>Conduct weekly staff meetings</td>
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<td></td>
<td></td>
<td>Practice</td>
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</tbody>
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Creating the Workplan

- Start with a base EHR implementation plan that includes EHR adoption steps.
- Plug in your desired live date and then work backwards to fill in the rest of the dates.
- Fill in who will be responsible for each task.
- The work plan will never be “set in stone” so anticipate changes to your work plan.
- The EHR vendor you choose may also have steps that need to be added to the workplan.
Step 5
Define EHR Implementation Goals and Measurements
Why Set Goals?

• Helps define success for the implementation and overall quality improvement
• When you define your goals, you can define your needs and actions
• When you define your needs, you can select an EHR system that will meet your needs
• Helps with staff buy-in and facilitates open communication
Goal Setting Basics

- **Goal Definition:** Set clear, measurable goals for what can be done to improve the existing conditions.

- **Action Plan:** For each goal, define a plan of action for achieving the goal. What specific steps do you need to take to reach your goal?

- **Measuring Success:** Determine how you will measure the success of your action plan.
Sample Goal

• Goal: Decrease the number of pharmacy phone calls regarding prescriptions
• Action Plan: Use the e-prescribing feature in the EHR to eliminate paper and handwritten prescriptions. Utilize the drug interaction checking feature of the EHR to guard against drug interactions
• Measure of Success: In two months, have an 85% reduction in pharmacy phone calls
Sample Goal

• **Goal:** Decrease transcription turnaround time and reduce transcription cost.

• **Action Plan:** Use clinical charting within the EHR to eliminate the need for transcription services.

• **Measure of Success:** Within two months of EHR live, reduce the cost of transcription by 80%.
Goal Setting Guiding Principles

• Keep it simple! Don’t get hung up on statistics, sample size and complicating factors
• Set clear, measurable goals
• Involve everyone in office- brain storm
• Define a plan of action for achieving the goal
• Determine how you will measure the success of your action plan
Contact CCME

The Carolinas Center for Medical Excellence
919-380-9860 ask to speak with EHR Services
You may visit CCME
www.thecarolinascenter.org/EHR
You may also email
EHRServices@thecarolinascenter.org