

## EHR Implementation Checklist

- Establishment of Project Team
  - Physician champion(s)
  - Project manager
  - Additional practice/department champions
  - Subject matter experts
  
- Development of Project Plan
  - Scope document
  - Implementation schedule/timeline
  - Roles and responsibilities
  - Change management process
  - Issue tracking and management process
  
- Communication
  - Setup regularly scheduled meetings with vendor implementation staff
  - Provide staff regular updates
  - Post implementation timeline in break room and mark overall progress
  - Utilize newsletters, email, etc. to address specific topics or issues
  
- Mapping of Critical Practice Workflows
  - Identify problem areas and bottlenecks
  - Re-map practice workflows based on incorporation of EHR into them
  
- Handling of Existing Data
  - Identify key information and documents that need to be in system
  - Develop plan for entering them into 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
  - Have vendor conduct general overview of system for all staff prior to formal training
  - Conduct multi 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 familiarize themselves with system
  - Develop appropriate education material, such as cheat sheets, quick reference cards, diagrams of new workflows

■ System Testing

- Conduct unit testing (i.e., single module)
- Conduct integration testing (i.e., interaction between two or more modules)
- Conduct interface testing (i.e., interaction between systems)
- Conduct system stress or load testing
- Ensure testing plans cover different scenarios and situations

■ Contingency Planning

- Develop disaster recovery plan
- Test ability to restore system from backups prior to go-live
- Ensure system backup plan in place and running
- Arrange for regularly scheduled pick up and off-site storage of backups

■ Go-Live Planning

- Determine amount physicians' schedules will be reduced (if any)
- Determine rollout approach:
  - Incremental vs. "big bang"
  - All physicians vs. physician champions
  - All practice locations vs. select ones
- Allow time during day for providers to "catch up"
  - Mid-morning and mid-afternoon buffers, or
  - Extra minutes per visit
- Ensure sufficient resources available to support staff and physicians
- Make sure staff and physicians know who they can go to for assistance
- Inform third parties and other vendors, e.g., labs, transcription, etc. of go-live date so they're prepared to provide additional support
- Plan for what to do if things go really wrong
  - Identify situations or points where go-live needs to be stopped
  - Decide what to do if that happens, e.g., go back to paper processes
- Schedule midday "huddle" to evaluate progress
- Schedule end-of-day debrief to identify and address issues
- Bring food, patience, and sense of humor
- Plan to celebrate



Mid-Valley IPA  
INDEPENDENT PHYSICIANS ASSOCIATION

## EHR Implementation Roadmap

Practice Name:	Practice Phone:
Physician Champion:	EHR Team Leader:

Stage	Practice Tasks	Milestone Checklist	Tools / Services Available
		Date	Milestone
<b>ASSESSMENT</b>	Complete MVIPA Readiness/Needs Assessment		Readiness / Needs Assessment
	Develop a clear vision & mission - articulate goals for implementation		Staff Readiness Assessment
	Create an EHR project team; the team should be selected from key staff in each area of the practice		Critical Success Factors
	Identify Project Manager		Project Team Role Descriptions
	Identify Physician Champion(s)		Link to Assessment of basic and Windows-Specific computer skills
	Identify "Super Users" - those who will be responsible for training staff using "train the trainer" approach		EHR Implementation Roadmap
	Determine how decisions will be made		Decision Matrix
	Identify Metrics for Success		Examples of Common EHR Goals
	Establish human resource requirements		Common measurements for an EHR
	Gauge staff attitudes		Practice / MVIPA Business Associate Agreement
Involve physicians and staff from an early stage; obtain buy-in		Reference materials	
Obtain commitment from physicians to training time and using the system			
Evaluate staff computer skills			
Begin regular meetings of EHR Team			

Stage	Practice Tasks	Milestone Checklist		Tools / Services Available
		Date	Milestone	
PLANNING	Develop a project plan for EHR implementation Plan for freeing up project members for implementation, training, and support		Project Plan completed	Elements of a Project Plan
	Identify needed interfaces		Features list finalized	Timelines
	Determine EHR features to be implemented		Equipment needs identified	Implementation overview; timeline template
	Evaluate existing templates; decide on degree of template standardization and development requirements		Workflow analysis completed and flowcharts created	Technology walk-through assessment and recommendations
	Obtain Technology Consultation from MVIPA		Communication Plan	Assistance with workflow analysis and documentation; flowcharting
	Perform Workflow Analysis and Documentation		Transition plan agreed upon	Pre-Implementation Meetings
	Identify key processes for improvement		Scanning plan agreed upon	Pros and Cons of EHR Implementation Options
	Develop communication plan		Training schedule agreed upon	Strategies for Medical Records Conversion
	Identify transition plan for paper records; begin preparing for transition		Equipment map completed	Sample Communication Plan
	Determine scanning and abstracting plan; staffing and equipment required		Go-live strategy agreed upon	Sample Cultural / Educational Assessment
	Define the training approach; communicate and discuss with staff/clinicians			References
	Schedule training; strategize backfill			
	Develop patient communication plan			
	Discuss go-live strategies			

Stage	Practice Tasks	Milestone Checklist		Tools / Services Available
		Date	Milestone	
IMPLEMENTATION	Hardware installation		Hardware installed	Common metrics
	Operational workflow meetings		New workflows done and communicated	Training manuals; quick reference cards
	Measure baseline metrics		Training issues discussed	Go-live support
	Launch patient communication plan		Education materials developed	Comparison of training methods
	Finalize workflow adaptations; communicate to staff		Testing issues discussed	Preparation with Process Redesign
	Train project team		Contingency plan completed	
	Develop in-house training program; customize training manuals, quick reference cards		Provider schedules addressed	
	Develop contingency plan for downtime			
	Template modification / development			
	Physician schedule modification for go-live			
Implementation dress rehearsal and system testing				
Celebrate success and address problems as they occur				
EVALUATION	Conduct post go-live reviews of implementation		Milestone	
	Evaluate EHR system goals and verify if all their goals have been met		Post go-live reviews for EHR goals and implementation	
	Survey staff and clinicians about opportunities for optimization			