

Successfully Implementing an Electronic Medical Record System

A Guide for Physician Practices

- ❖ This systematic, proven approach provides a straightforward explanation of the necessary steps to effectively implement and use a practice-based EMR system. It presents insights into various implementation-related strategies, issues, pit falls and best practices for EMR success.
- ❖ Designed to be used by physician practices as a hands-on guide for implementation planning, project management, process design, training and other key activities required in the implementation of an EMR system.
- ❖ Appendices include tools for project planning and management, workflow analysis and design, system template design, as well as sample testing and training guides, checklists and other materials to help guide a successful EMR implementation.



Outlook Associates, LLC
18022 Cowan Street
Suite 255
Irvine, CA 92614
888-432-0261 phone
info@outlook-associates.com
www.outlook-associates.com

Preface

If you have purchased this guide, we assume you have already purchased an Electronic Medical Record (EMR) system to meet the many goals and expectations of your practice. Hopefully, your practice used an organized and effective process for evaluating and selecting your system, and now all key clinical and operational personnel are ready to move forward to reap the anticipated benefits. Our goal with this guide is to help you succeed with your EMR implementation, regardless of the software vendor/product you have acquired.

This guide is not meant to replace the implementation instructions and application-specific materials supplied by your EMR system vendor. Those materials are critical to the precise set up and configuration instructions for *installing* the specific EMR application and technology you have purchased. Instead, this book is designed to supplement these materials, emphasizing the broader aspects of EMR *implementation* that will help your practice assure that how the system is *installed* will:

- ❖ Support your short and longer term goals.
- ❖ Work within the environmental realities of your practice setting.
- ❖ Go-Live with the least number of challenges and “surprises”.
- ❖ Be understood and effectively used by all personnel within the practice.
- ❖ Position your practice for on-going advancement and success.

Many helpful worksheets and checklists have been included in this workbook. They may be used “as-is” or customized to meet your specific needs. To obtain electronic versions of any worksheet via e-mail, send your name, contact information and e-mail address along with the name of the requested worksheet(s) to info@outlook-associates.com.

About Outlook Associates

Outlook Associates was founded in 1991 with the goal of improving health care through the effective use of technology and the availability of information on which to base sound medical and business decisions. We pride ourselves on our reputation of providing high-quality, results-focused, ethical consulting services to the health care industry.

Our clients include physician practices, medical groups, hospitals, health plans, government institutions and non-profit agencies and organizations across the country. Our principal areas of expertise are information systems and technology, operations improvement and regulatory compliance. Our consultants are seasoned health care veterans with 15 to 30 years of real-world experience in all major segments of the health care industry. They possess a thorough understanding of health care operations and systems and balance a practical approach to each engagement with existing processes, procedures and tools.

Over the years, Outlook Associates has helped physician practices:

- ❖ Evaluate, select, implement and effectively configure new Electronic Medical Record and Practice Management systems to meet immediate and long-term organizational goals.
- ❖ Leverage existing information systems to maximize the return on IT investments.
- ❖ Improve the accuracy, quality and timeliness of data used to make clinical, financial and other practice management decisions.
- ❖ Improve operational processes, performance and accuracy to reduce costs, improve revenue and increase clinical and operational efficiency.

For more information, please contact:



Outlook Associates, LLC
18022 Cowan Street
Suite 255
Irvine, CA 92614
888-432-0261 phone
info@outlook-associates.com
www.outlook-associates.com

Table of Contents

Chapter 1 ■ Introduction

A Guide for All Levels of EMR Sophistication

Chapter 2 ■ Assembling an Effective Implementation Team

Implementation Team Leadership Responsibilities

Other Project Roles and Responsibilities

Project Resource Considerations

Chapter 3 ■ Setting Implementation Strategy and Scope

Finalizing EMR Goals and Priorities

Establishing Implementation Strategies

Phased versus “Big Bang” Implementation

Standardized vs. Individualized Design

Historical Medical Chart Information

EMR Implementation Communication

Live Date Scheduling Constraints and Communication

Documenting the Scope and Approach

Appendices

3A - EMR Goals and Expectations Survey

3B - Communication Plan

3C - Scope

Chapter 4 ■ Developing the Project Plan

Understanding Motivations and Aligning Approaches

Vendor Planning Meetings

Deciding on Tactics, Resources and Schedules

Documenting the Project Plan

Establishing a Go-Live Date

Appendices

4A - Template Design Documentation Samples

4B - EMR Project Plan Sample

Chapter 5 ■ Project Management and Executing the Plan

Vendor vs. Practice Project Management

Establishing a Workable Project Structure

Maintaining Effective Project Communication

Controlling Project Scope

Managing Risk

Managing to the Project Plan and Budget

Managing Project Issues

Managing the Vendor Contract

Table of Contents

Appendices

5A - Team Meeting Agenda

5B - Project Status Report

5C - Scope Change Request

5D - Project Tracking Log

Chapter 6 ■ Workflow Re-Design and Impacts

Workflow Re-Design

The Psychology of Change

Appendices

6A - Sample Workflow Documentation

6B - Check-In

6C - Rooming a Patient

6D - Patient Visit: Medical

6E - Orders

6F - Results

6G - Billing

6H - Telephone Message

6I - Refill Request

6J - Appointment Failure

Chapter 7 ■ System Testing

Planning

Working with Test Scenarios

Test Environment

Executing the Test Plan

Appendices

7A - Test Scenario Template – Unit Testing

7B - Test Scenario Template – Component System Integration and Full Production Testing

7C - Test Scenario Template – Interface Testing

Chapter 8 ■ Medical Records Conversion

Recapping the Strategy

Key Tactical Decisions

Detailed Medical Conversion Planning

Archiving Medical Records Following Go-Live

Appendices

8A - Medical Record Conversion Examples

Chapter 9 ■ Contingency Planning

Establishing System Redundancy

System Back-ups

Developing an Effective Contingency Plan

Table of Contents

Appendices

- 9A - Sample System Back-Up Procedure
- 9B - Sample Communication Plan
- 9C - System Recovery Validation Form
- 9D - System Outage/File Recovery Tracking Form

Chapter 10 ■ Training

- Training Personnel
- Training Materials
- Training Environment
- Training Delivery

Appendices

- 10A - Course Outline
- 10B - Post-Training Proficiency Test
- 10C - Course Evaluation Form
- 10D - Basic Personal Computer Skills Assessment

Chapter 11 ■ Going “Live” with EMR

- Readiness Review
- Dress Rehearsal
- Go-Live Preparations
- Go/No-Go – The Final Checkpoint
- Go-Live
- Celebrate

Appendices

- 11A - Application Go-Live Checklist
- 11B - Security and Confidentiality of Protected Health Information in the Electronic Medical Record (EMR) System (Sample)
- 11C - Post Go-Live Status Meeting Questions

Chapter 12 ■ Stabilizing and Moving Forward

- Gaining EMR Confidence, Skills and Efficiency
- Implementing the Next Phase
- System Upgrades
- Pushing the Envelope

Workbook Evaluation