

# Implementation Planning for a Successful Electronic Medical Record System

Once you have spent the time and gone through the process of evaluating and selecting your Electronic Medical Record (“EMR”) system vendor, it is very tempting to immediately begin implementing the system with hopes of gaining full use within a few months. Before acting on this impulse, however, it is important to keep the following in mind:

System implementation projects, in general, experience low success rates:

- 28% of projects meet full success
- 49% of projects are fully completed, but over budget, over schedule and lack full scope of planned functionality
- 23% of projects experience complete failure or are cancelled [1]

EMR/EHR system implementations have even higher failure rates. Industry studies reveal failure rates of 50%, others as high as 70%. [2]

[1] *Extreme Chaos, 2000. The Standish Group*

[2] *Dr. David Brailer, National Coordinator for Healthcare IT, US DHHS*

These statistics are included here not to dissuade you from moving forward, but to caution you about doing so without full, careful planning and clear goals. The following approach will help to ensure your implementation success:

## 1. Establish an Effective Implementation Team

For success, your implementation team needs to include the following:

- Clinical “Champion”: a visionary respected leader to establish the ‘big picture’ plan and gain clinician buy-in.
- Project Manager: highly organized facilitator and team leader with an excellent understanding of your practice.
- Project team representatives from each clinical, ancillary and operational area to provide input and validate system set up.
- An experienced Network Design/Technical Support Analyst to address the technical installation tasks.
- A Trainer: responsible for working with the vendor to tailor the training to your unique requirements and support on-going training for new employees.

Each of the roles does not necessarily represent separate individuals. In a smaller office environment, many of these roles are played by 2 - 3 individuals.

## 2. Finalize EMR Goals & Priorities

Ideally, during your system selection process your practice team developed a clear vision for your EMR system and defined a set of goals you expect the system to help you achieve. Which of the following goals are most important for your practice?

- Increased clinical and operations efficiency/productivity
- Increased revenue
- Improved patient care

- Reduced opportunity for error
- Improved access to information
- Reduced administration & clinical costs
- Competitive advantage
- Other?

Your highest priorities should drive your system set up and workflow decisions and govern the features and functions implemented.

### 3. Establish Implementation Strategies

#### Rollout vs. “Big Bang”

Deciding how much of the system capability and which users to implement on Day One will dictate the size of implementation team and schedule. Before deciding how to approach the implementation, consider the following:

- How much of the available system functionality is really needed immediately versus over time? Can the practice absorb large blocks of change or is it better to introduce change slowly and incrementally? What increments of time are appropriate for introduction of new functionality not included in the “day one” plans?
- Who should go first with the initial functionality? Is there one individual or area that is more ready than the others to move ahead and how will doing so impact the other areas of the practice? What is the appropriate timing for moving a second, third, etc. group/individual forward if a “big bang” (i.e., all individuals and areas at the same time) approach is not used?

If many members of your practice team are inexperienced with systems and technology, an incremental approach will help ease the transition and win greater acceptance more quickly.

### 4. Document the Agreed Strategy and Scope

Throughout implementation, requests and temptation to increase project scope and “add just one more small function” or “just one more user” are a constant threat to implementation success. This “scope creep” typically occurs without adequately thinking through the ramifications to the larger strategy analysis and without fully considering the critical time constraints on team members and other practice personnel. Scope creep inevitably results in implementation delays, increased costs and rework. It is the reason behind many EMR system implementation failures.

### 5. Conduct Internal Planning Meetings and Document Decisions

Your implementation team will want to spend time carefully thinking through a number of key considerations prior to vendor planning meeting in order to ensure sufficient, un-pressured time for evaluating the most ideal approach for your practice and gaining practice team input. Consideration for preplanning should include ancillary and vendor interface priorities, medical record conversion approach (i.e., what is to be scanned, entered and/or electronically uploaded), incremental versus “big bang” approach decision, workflow preferences and responsibilities for entering specific data for patient visits and other practice activities once the system is operational. While some of these decisions may be reevaluated based on input from the vendor or knowledge gained from additional system training, they help to serve as a benchmark for planning and compromise.

## **6. Conduct Detailed Vendor Planning Meetings**

The early detailed planning meetings between your implementation team members and those of the vendor are critical for establishing the overall parameters for the project and setting a positive tone for the on-going relationship. Vendor planning meetings will include detailed discussion and final decisions for many of the same areas addressed in the practice's internal planning meetings in order to set schedules. They will, however, typically focus more specifically on vendor and system detail and requirements such as hardware and software delivery schedules, milestone definition for payment increments, and clear delegation of responsibilities between vendor and practice team members.

## **7. Finalize Your Implementation Plan Document**

Your implementation plan document needs to include all practice and vendor tasks. The plan will serve as the critical map for implementation success and will serve as a constant reference point for evaluating progress and detecting potential problems that will cause project delays, errors, additional costs, etc. The practice's project manager should continually review and update the project plan as progress is made, as further task detail is defined and as resources are juggled to complete day-to-day business in addition to multiple project demands.

## **8. Establish Benchmarks to Measure Project Success**

Each goal for the EMR system has an expected improvement – whether in efficiency, revenue, reduced cost, ease of data access, etc. Before moving too far ahead, establish clear measurements of where the practice is “pre-EMR” within each of these goal categories so that increments of success can be clearly recognized and celebrated.

By following the steps and tips outlined in this document, your practice will be well positioned for EMR success and for gaining the many benefits envisioned by the system purchase.

Best possible success to you as you move forward with your EMR adoption.