



ELECTRONIC HEALTH RECORDS – 8 STEPS FOR SUCCESSFUL IMPLEMENTATION

By Missi Goss

- 1. Pick the right system.** Do your research. Talk to other offices that have Electronic Health Records. Compare prices that have ongoing TRAINING and SUPPORT configured in, which may be a huge factor in office's understanding of the product.
- 2. Expect change.** Have a staff member who will be the “go-to” person in the transition to the EHR. Have a positive attitude and convey to staff that this is the direction of the office. While being firm that this is the system that must be learned, also have a positive atmosphere that your office is a pioneer in the local EHR community.
- 3. Expect some resistance.** Some physicians or staff members may be resistant to do “something new”, at first. Some may feel they will “never get it”. It has been the experience of EHR trainers that these same people, after a few months of solid use of the product, cannot imagine “doing it the old way”. It takes thorough training and active use of the product to get over initial resistance.
- 4. Make a plan for workflow with your office.** Make each staff member responsible for certain duties within the EHR. Front office may be responsible for entering appointments and new patient information. M.A.'s may be responsible for entering vitals and chief complaints into the record. REDEFINE JOB DESCRIPTIONS AS NECESSARY and make sure every staff member KNOWS their duty.
- 5. Physican/Provider readiness.** Make sure the provider is comfortable within the EHR section of the software you have chosen. Does the provider know how to enter the various sections of the notes? Does the provider need templates built to help expedite the completion of the progress note? Does the provider KNOW where to look for incoming messages, refill requests, lab results? Sometimes the basic things are those that get “forgotten” or overlooked.
- 6. Training and Support IS IMPORTANT.** Make sure the trainer sent to you by the software vendor or the support provided over the phone, is THOROUGH and that each staff member UNDERSTANDS what is being taught to them. Don't skip over something because you think you will “understand later”. Take complete and thorough advantage of the onsite trainer or initial phone support provided to you. This cannot be stressed enough.
- 7. Ongoing training and support IS CRITICAL TO YOUR SUCCESS.** Make sure you understand what support is provided to you from the software vendor. Do you get a certain BLOCK of hours? What is included? Look into local training and support to supplement what the vendor offers you. ***Don't underestimate the need for local trainers and IT (computer) support.*** Local support can come to you in a timely manner, instead of having to call a national support line and wait several hours (or even days) for someone to get back to your office, sometimes over small questions that can stop or delay productivity.
- 8. Continue to learn and grow with the industry.** EHR's have come a long way in the last couple of years. There will likely be many changes coming in the future. Stay on top of the newest changes within the industry and the software you have chosen, or have a staff member or medical management company that can do this for you.

~Missi Goss (Electronic Health Record Training and Implementation Specialist) has been in the administrative healthcare industry for over 15 years. She has worked at Medical Management Strategies of San Luis Obispo for 7 years. Missi has been trained in Boston, Massachusetts at Eclinicalworks and is certified with SOAPWARE.

Learning to use an EHR is a lot like learning a musical instrument. You don't just pick it up the first day and expect to be a virtuoso.