

## IT solutions that work for your practice.

We offer a complete spectrum of services to support your network and optimize the effectiveness of your practice management and EMR software.



Phone 877-624-8247 Local 714-975-5100

Health Information Technology Specialists  
Simplifying your EMR Transition

## EMR implementation checklist

### Establishment of Project Team

- Physician champion(s).
- Project manager.
- additional practice/department champions.
- subject-matter experts.

### Development of Project Plan

- implementation schedule/timeline.
- Roles and responsibilities.
- change management process.
- issue tracking and management process.

### Communication

- set up regularly scheduled meeting with vendor implementation staff.
- Provide staff regular updates.
- Post implementation timeline in break room and mark overall progress.
- Utilize newsletters, e-mail, etc., to address specific topics or issues.

### Mapping of Critical Practice Workflows

- identify problem areas and bottlenecks.
- Remap practice workflows, incorporating HiT.

### 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.
- conduct hands-on, task-oriented sessions tailored to staff responsibilities
- identify "super users" ensure they receive additional training sessions
- give 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 testing of modules and their integration with other systems.

### Contingency Planning

- develop disaster recovery plan.
- Test ability to restore system from backups prior to going live.
- ensure a system backup plan in place and running.

### Go-Live Planning

- determine amount physicians' schedules will be reduced (if any)
- allowing time during day for providers to "catch up."
- determine rollout approach (all at once or piecemeal).
- ensure sufficient resources available to support staff and physicians.
- live date so they are prepared to provide additional support.
- Plan for what to do if things go really wrong.
- schedule midday "huddle" to evaluate progress.
- schedule end-of-day debrief to identify and address issues.