

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 meeting 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