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Switching EHR Partners Made Easy

A Step-by-Step Guide to Preparing for and Finding a New EHR Partner

The investment of time and money into
an electronic health record (EHR) platform
is significant – for you and everyone involved.
When you're thinking of switching from your current
EHR provider there are a number of things
you should take into consideration.
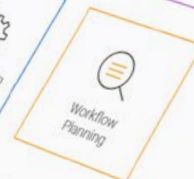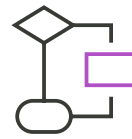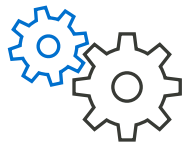
We have broken it down into four easy steps.
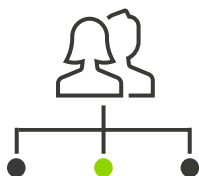
Organizational
Commitment

Project
Readiness

Implementation
Strategy

Workflow
Planning

1 | Get Organizational Commitment to Switching Your EHR Provider

As you begin thinking about looking for a new EHR provider, assign an internal project team who will work together to make high level project related decisions, define system and user requirements, determine and manage budget stewardship, reach issue resolution, and collectively own overall success of the project.

Finding a new EHR partner and successfully implementing a new platform requires a dedicated and committed team who will:

- Champion the project

- Define the user and system requirements

- Establish and manage the budget

- Research and collectively select the new EHR provider

- Promote overall project commitment

- Allocate the required time to successfully complete the various tasks

- Identify and implement best practices

- Motivate the facility team members

- Ensure the use of the new EHR system and its associated functionality

Your project team should include:

Project Sponsor:

- Responsible for acting as the Champion for the project and serving as the escalation point for issues, decisions, etc. The Executive Sponsor will also help build excitement, communicate the reason for change, enforce compliance and promote the EHR project within the organization and throughout the facilities.

Project Manager:

- Responsible for managing the overall project, developing the project plan in conjunction with your vendor's project manager, communication plans and applicable project tools for the EHR implementation, coordinating the associated systems integration and IT related tasks, and working with the internal EHR team to develop the EHR implementation approach and methodology. The PM will also manage the EHR and third-party vendors and serve as the liaison and advocate between the organization and associated vendors. If applicable, the PM will also establish internal workgroups to redefine workflow, processes and best practices, and will coordinate and manage the related activities.

Clinical and Financial Leads:

- Responsible for leading the effort and manage the tasks associated with the planning, defining user requirements, setup/configuration, identification of facility champions, super users, internal trainers, resource scheduling, training, etc., for each of their areas. They will also be responsible for working and communicating with the assigned project manager and the EHR Team. These roles are best filled by people with enough experience to understand workflow issues and the authority to make those decisions during the configuration of the system.

IT Lead:

- Responsible for all IT project related tasks, defining system requirements, infrastructure analysis, related changes, upgrades, equipment purchases, deployment and testing.

# 2 | Agree on Project Scope, Planning, and Communication Strategy
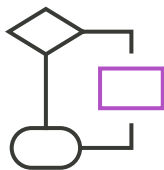
As you begin to research new providers establish your project team, clearly define the project scope and confirm that the entire team understands which systems, processes and activities will change when the new EHR system is implemented.

Be sure to gain consensus on these decisions before choosing your new EHR partner:

- Confirm the organization EHR Project Team

- Clearly define and communicate the roles and responsibilities of EHR project team members, for example, who will serve as the point person for the clinical and financial teams?

- Identify workgroups (if applicable) and create workgroup charters for Business Process/Workflow, Business Continuity, Clinical, Financial, IT, Legal/Risk/Compliance and Change Management. Assign workgroup owners and workgroup participants

- Develop a communications plan with the goal of promoting open communication and accessibility with all team members and users. This plan should include weekly status meetings and reports, issue/risk tracking sheet, change management and scope change procedures, and monthly executive management updates

- Plan in advance for EHR project kick-off meetings with your internal team, vendor, and facility

- Develop and confirm the project timeline, budget and the EHR project plan. The EHR project plan identifies the tasks, work effort required, start/end dates, predecessors and assigned resources for the overall project, not just the EHR vendor's tasks

- Carefully assess and plan for data import and conversion from your existing system.

- Plan for sunsetting the your existing EHR system, including document storage and retrieval (maintaining and accessing historical data)

- Determine and plan for third party integration (Therapy, Lab, Radiology, Vitals, HIE)

- Determine and plan for infrastructure requirements (wireless, corporate and facility equipment)

3 Create an Implementation and Rollout Strategy
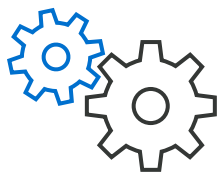
With agreement on the scope, plan, and communications strategy, it's time to think through how your new EHR platform will be implemented. As you research vendors, it's important to keep this top of mind. Your new EHR partner should play an active role in making sure everything has been considered to ensure the smooth implementation of your new platform.

Some important implications to consider through this step of the process include:

- Is a phased or all-in approach best for your teams? Do you need to consider a regional rollout?

- Do you need to consider a pilot facility for multi facility organizations in order to clarify purpose, expectations, and strategy?

- What is the appropriate timing for implementation? What are your Go Live dates, training dates/schedules, IT deployment, etc., based on the selected strategy?

- Do the corporate and facility EHR team members understand the platform modules, related integration, and the timing of the various Go Live date(s)?

- What is your post-implementation strategy to provide the required follow up training and support required during and after the Go-Live date(s)?

Be Sure to Set Realistic Goals and Expectations

As you work with your project team to plan for transitioning to a new EHR platform, remember to set realistic goal and expectations based on resource availability and internal bandwidth. Your new partner should work with you and your team to understand your unique needs, and help you plan for this organization-wide change.

Be sure to work with your team to:

- Clearly define the roles and responsibilities of all team members and confirm that they understand the time commitments required to complete the various tasks.

- Develop a time estimates document for each component of the project to determine labor requirements for the project. For example, how much time is required to develop user defined assessments, POC tasks, enter medication/non medication into the system, etc.

- Implement overtime guidelines or an incentive program for staff members who work over their regularly assigned hours while preparing for the EHR platform implementation.

4 | Get Your House in Order

Before selecting a new EHR partner, it's imperative that you assess and analyze your existing workflow, processes, IT infrastructure, and requirements as they relate to the solutions being offered. Without first understanding what your current processes and requirements are, it's easy to choose a vendor who can't fully meet your existing or future needs.

Your first step is to review existing clinical and financial processes to determine if or how your workflow will change. For example, admissions (ADT), AOL capture, month end close, billing tasks, etc., and develop a plan to revise, develop, document and implement the new processes and best practices for your organization.

Once you've assessed your current workflow you'll need to:

- Work with your team to identify and eliminate the duplication of effort and redundancy with the goal of increasing efficiency and providing the clinical staff with more time to allocate to resident care.

- Create a team and plan for the implementation and test/QA all setup, configuration, new content and associated functionality (i.e., UDAs, Care Plans, AR/Billing related information, MDS Assessments, etc.) in a testing environment before you Go-Liive with your new EHR platform and third-party integration.

- Complete the necessary IT infrastructure related assessments/analysis, facility walkthroughs, equipment purchases, installation and testing to ensure the facilities are 100% ready for the new EHR platform implementation.

- Before your Go Live date, develop or modify all procedures and documentation related to Business Continuity/Downtime, IT/Security, Legal/Risk/Compliance, Clinical, and Financial operations

Choosing an EHR partner is a decision that requires significant thought, team input and a solid strategic approach. As you consider the requirements for your new platform, it's equally as important to consider the credentials and reputation of your new partner. A true partner will help you identify your current gaps, plan for your future needs, and work with you to find ways to help your teams adapt to the change.

Switching EHR partners should be a painless transition. Learn how other providers are receiving 7x more hospital referrals using the right technology.

Book Your Consultation

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