EHR Implementation Checklist

Establishment of Project Team
- Physician champion(s)
- Project manager
- IT\EHR Lead
- Super User
- Workflow Coordinator

Development of Project Plan
- Scope document
- Implementation schedule/timeline
- Roles and responsibilities
- Change management process
- Issue tracking and management process

Communications
- Setup regularly scheduled meeting with EHR vendor implementation staff
- Provide your practice 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

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
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**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!

This material was prepared by Lumetra, the Medicare Quality Improvement Organization for California, and adapted by the Illinois Foundation for Quality Health Care, the Medicare Quality Improvement Organization for Illinois, under contract with the Centers for Medicare & Medicaid Services (CMS), an agency of the U.S. Department of Health and Human Services. The contents presented do not necessarily reflect CMS policy. IL-8SOW-PO-73-03/06