



EHR Implementation Roadmap: 2005 Pilot

Practice Name: _____ Date: _____

HealthInsight DOQ-IT Team Facilitator: _____ Clinic Phone: _____

Physician Champion: _____ EHR Team Leader: _____

Stage	Practice Tasks Recommended for successful movement along the EHR Implementation Roadmap	Milestone Checklist To demonstrate measurable movement along the EHR Implementation Roadmap <i>(Indicate the date when each milestone is completed)</i>	Tools and Services Provided by HealthInsight																
ASSESSMENT	<ul style="list-style-type: none"> ▪ Complete IT readiness assessment ▪ Assess current workflow (identify pain points) ▪ Begin or continue regular staff meetings (at least monthly) ▪ Assign physician champion ▪ Organize an EHR selection/implementation team ▪ Assign an individual (EHR team leader) and/or team to lead practice changes ▪ Commit to: <ul style="list-style-type: none"> ○ Full provider engagement to enter data ○ Workflow changes necessary to maximize results ▪ Read Outlook Associates guide, chapters 1-7 ▪ Attend DOQ-IT Learning Session 1 	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">Date</th> <th style="width: 80%;">Milestone</th> </tr> </thead> <tbody> <tr><td> </td><td>IT readiness assessment</td></tr> <tr><td> </td><td>Readiness/next steps reviewed</td></tr> <tr><td> </td><td>Physician champion assigned</td></tr> <tr><td> </td><td>Team leader and/or team assigned for practice changes</td></tr> <tr><td> </td><td>Current workflow processes assessed</td></tr> <tr><td> </td><td>Give signed participation agreement to HealthInsight</td></tr> <tr><td> </td><td>Proposed implementation target date</td></tr> </tbody> </table>	Date	Milestone		IT readiness assessment		Readiness/next steps reviewed		Physician champion assigned		Team leader and/or team assigned for practice changes		Current workflow processes assessed		Give signed participation agreement to HealthInsight		Proposed implementation target date	<ul style="list-style-type: none"> ▪ Outlook Associates guide ▪ Key EHR articles ▪ List of success factors ▪ Barriers and solutions worksheet ▪ Complete onsite assessment ▪ Facilitate staff discussions ▪ Conduct workflow analysis ▪ Learning Session 1: Assessment and Planning
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PLANNING	<ul style="list-style-type: none"> ▪ List clinic goals and priorities (include functions and specific provider needs) ▪ Translate identified EHR goals into available EHR system functions and features ▪ Identify staff at lower levels of readiness and address their concerns ▪ Develop a timeline and project plan ▪ Gain support from team members and staff and prepare staff for changes ▪ Attend DOQ-IT Learning Session 1 <p>Optional:</p> <ul style="list-style-type: none"> ▪ Write RFI/RFPs ▪ Complete a cost/benefit analysis and ROI for an EHR system 	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">Date</th> <th style="width: 80%;">Milestone</th> </tr> </thead> <tbody> <tr><td> </td><td>Clinic has identified goals, priorities and any staff concerns</td></tr> <tr><td> </td><td>EHR goals and associated system functions are listed</td></tr> <tr><td> </td><td>Business plan developed, includes such items as:</td></tr> <tr><td> </td><td>- Target implementation schedule/timeline</td></tr> <tr><td> </td><td>- Estimates of EHR budget and ROI</td></tr> <tr><td> </td><td>- Measurable EHR goals</td></tr> </tbody> </table>	Date	Milestone		Clinic has identified goals, priorities and any staff concerns		EHR goals and associated system functions are listed		Business plan developed, includes such items as:		- Target implementation schedule/timeline		- Estimates of EHR budget and ROI		- Measurable EHR goals	<ul style="list-style-type: none"> ▪ Sample implementation plans and timelines ▪ Key features list ▪ Example goals ▪ Sample RFI/RFPs ▪ ROI spreadsheet tool ▪ Financing options ▪ Peer interaction with successful clinics ▪ Facilitate staff meetings ▪ Learning Session 1: Assessment and Planning (March/April 2005) 		
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SELECTION	<ul style="list-style-type: none"> ▪ Attend structured demonstrations at DOQ-IT Vendor Fair ▪ Attend Learning Sessions 2 and 3 ▪ Evaluate vendors and create short list of 2-3 vendors ▪ Review EHR systems: <ul style="list-style-type: none"> ○ Run vendors through a clinic-specific case scenario ○ Go on at least one site visit ○ Obtain at least three vendor references ▪ Identify and select vendor for hardware, office wiring, and necessary network support for all services and products not included in EHR ▪ Negotiate contracts including all aspects of implementation, training, and technical support ▪ Continue workflow assessment and changes 	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">Date</th> <th style="width: 80%;">Milestone</th> </tr> </thead> <tbody> <tr><td> </td><td>Negotiate contracts and financing</td></tr> <tr><td> </td><td>EHR vendor selected</td></tr> <tr><td> </td><td>Hardware vendor selected</td></tr> <tr><td> </td><td>Vendor selected for office wiring and cabling needs that are not included in EHR package</td></tr> </tbody> </table>	Date	Milestone		Negotiate contracts and financing		EHR vendor selected		Hardware vendor selected		Vendor selected for office wiring and cabling needs that are not included in EHR package	<ul style="list-style-type: none"> ▪ Vendor selection tools and rating references ▪ Sample case scenarios ▪ Contracting tips ▪ E-mail and conference call discussion forums ▪ Learning Sessions 2: Vendor Selection and 3: Contracting (May 18 and June 28) ▪ Vendor Fair (June 11) ▪ Assist with vendor demonstrators 						
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IMPLEMENTATION	<ul style="list-style-type: none"> ▪ Draft EHR system implementation plan and timetable ▪ Assign data manager/administrator ▪ Assure data conversion and testing completed ▪ Assure interfaces completed and tested for: <ul style="list-style-type: none"> ○ Laboratory ○ Radiology ○ Practice management (billing and scheduling) ○ Referrals ▪ Assign a "go-live" date ▪ Train staff ▪ Attend DOQ-IT Learning Session 4 and/or work directly with your clinic facilitator ▪ Celebrate success and address problems 	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">Date</th> <th style="width: 80%;">Milestone</th> </tr> </thead> <tbody> <tr><td> </td><td>Implementation plan completed</td></tr> <tr><td> </td><td>Contracts completed and signed</td></tr> <tr><td> </td><td>Data manager assigned</td></tr> <tr><td> </td><td>Data conversion and testing completed</td></tr> <tr><td> </td><td>Interfaces tested and working properly</td></tr> <tr><td> </td><td>"Go-live" completed and celebrated</td></tr> </tbody> </table> <p>Vendor will be the primary driver of this stage, so they should be thoroughly engaged in all aspects of implementation.</p>	Date	Milestone		Implementation plan completed		Contracts completed and signed		Data manager assigned		Data conversion and testing completed		Interfaces tested and working properly		"Go-live" completed and celebrated	<ul style="list-style-type: none"> ▪ Sample data testing documentation ▪ Outlook Associates Implementation Guide ▪ Sample chart data conversion templates ▪ Learning Session 4: Implementation and/or individual assistance (July 2005) ▪ Follow-up on your progress ▪ Identify additional workflow adaptations 		
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EVALUATION	<ul style="list-style-type: none"> ▪ Conduct post go-live reviews of implementation ▪ Conduct additional staff training as needed ▪ Evaluate EHR system goals met to date ▪ Verify vendor has provided technical infrastructure to capture clinical measures and submit data to CMS through Q-Net exchange ▪ Submit DOQ-IT data (available August 2005) ▪ Work directly with your clinic facilitator to track your progress 	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">Date</th> <th style="width: 80%;">Milestone</th> </tr> </thead> <tbody> <tr><td> </td><td>Post go-live reviews for EHR goals, implementation and additional staff training completed</td></tr> <tr><td> </td><td>Schedule additional staff training</td></tr> <tr><td> </td><td>Data capture verification completed with vendor</td></tr> <tr><td> </td><td>DOQ-IT data being submitted to CMS</td></tr> <tr><td> </td><td>Assess full use of EHR system and address lags</td></tr> </tbody> </table>	Date	Milestone		Post go-live reviews for EHR goals, implementation and additional staff training completed		Schedule additional staff training		Data capture verification completed with vendor		DOQ-IT data being submitted to CMS		Assess full use of EHR system and address lags	<ul style="list-style-type: none"> ▪ CMS performance report to practice (validate as needed) ▪ Identify user groups ▪ Help with CMS data submission 				
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IMPROVEMENT	<ul style="list-style-type: none"> ▪ Commit to continuous review of clinical and administrative processes ▪ Identify and target additional care management and process improvement opportunities ▪ Use EHR to optimize practice of evidence-based medicine ▪ Attend DOQ-IT Learning Session 5 and/or user groups ▪ Continue submission of DOQ-IT data 	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">Date</th> <th style="width: 80%;">Milestone</th> </tr> </thead> <tbody> <tr><td> </td><td>Reanalyze clinical and administrative processes</td></tr> <tr><td> </td><td>Review performance reports</td></tr> <tr><td> </td><td>Identify quality improvement opportunities</td></tr> <tr><td> </td><td>Redesign work processes to use EHR clinical decision support tools with each patient encounter</td></tr> </tbody> </table>	Date	Milestone		Reanalyze clinical and administrative processes		Review performance reports		Identify quality improvement opportunities		Redesign work processes to use EHR clinical decision support tools with each patient encounter	<ul style="list-style-type: none"> ▪ Learning Session 5: Care Management and Improvement (August 2005) ▪ New workflow analysis ▪ Supply best practice solutions to improve performance data 						
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