

TRAIN YOUR WAY TO A SUCCESSFUL EHR IMPLEMENTATION

How to prepare for your upcoming go-live.

If you've ever started a new job, you have likely experienced some type of learning curve with the different types of software your firm uses. Maybe you've had to tinker around with a new instant messaging application, fumble through logging your hours in a new system, or setup a different email inbox – any of which can be awkward to use at first. In times like these, training documentation can be a life-saver and help you avoid that missed email, ill-timed meeting, or dreaded half-message sent. While no one wants to feel the embarrassment of a workplace faux pas, what happens when software errors can cause legitimate harm to others? How much *more* important are the software training documents in these situations? It is imperative that medical systems consider the importance of these documents whenever onboarding a new electronic medical record (EMR) system or upgrading their existing system. When one wrong entry could affect the treatment that a patient receives, it is critical that end users are educated.

So how can you make sure that end users in a medical setting are ready to treat patients and feel prepared to use ever-evolving systems? Below are ways to help ensure that your staff is ready to take care of patients in your new or enhanced EMR system:

- (1) Involve your trainers.** Involve your trainers throughout the build process. It is important that your trainers are experts in the system and know the workflow inside and out. It is also beneficial if they are equipped to answer questions on the “*why*” behind the build in order to help end users thoroughly understand the workflow. It will also allow trainers to easily gather materials and determine what additional supplemental deliverables may be needed to assist with the upcoming launch.
- (2) Create your own materials.** Your organization should be creating training materials. It is great if your EMR vendor provides training materials and you don't have to start from scratch. However, you want to make sure that the language is something that your end users are going to relate to and understand. If there are even little details that are different than how the organization functions today, it can cause end users to focus in on those instead of the training at hand. In the customized materials, make sure they are also learning real life situations they may encounter and that those situations are specific to their specialty.
- (3) Build a training team.** Identify end users that can act as trainers on the floor. These individuals should be staff that are respected by peers and are able to teach others. Having peers that can help enforce the training and be experts will help ensure a smooth launch for the new users. This strategy also decreases the amount of support you need from trainers or the IT team during go-live. There should at least be one of these trainers on every floor during launch.
- (4) Go back to school!** Try to have training in a classroom if possible. This may seem hard and having staff in a classroom means time away from patients and further, in-person training has grown even more difficult with COVID-19 complications. However, if possible, it is beneficial to get people together for training in order to ensure that end users are paying attention to the material and have access to ask trainers questions as they go. If you cannot hold training in a classroom, make sure to have a chat function or small virtual rooms so that end users can ask the trainer questions as they go.

- (5) Make training interactive.** We have all been there, you are listening to a seemingly endless training seminar and everyone’s eyes begin to gloss over with boredom. This training is important for these users - this is where providers will be entering orders and medical professionals entering medication orders and vital measurements, so this is not a time we want end users unfocused. Ask questions throughout, create partner activities, let users try it themselves: these are all great ways to get the end users focused. Hands-on learning can also be much more effective for certain types of learners.
- (6) Consider your timing.** Plan to hold training as close to go-live as possible. It is very easy to learn something and then to forget it if you are not using it often. If training needs to be early, try to provide a training environment that is available for learners to go in and test their knowledge. This environment can also be a great way for people to be excited about the new or enhanced system and can even spur questions ahead of go-live that may be beneficial for the whole team to hear.
- (7) Test users’ knowledge.** Given the complexity of EMR systems and the importance each entry has, make sure to test end users before allowing them access at launch. There will need to be different levels of assessments as a medical tech will have different permissions than a physician, however you want to know that when prompted, all staff know where to go to view and enter critical patient information. If adding onto or enhancing an existing system, an assessment may not be warranted, as removing access may be difficult or the changes may be minimal enough that base knowledge will be sufficient for the new workflows.
- (8) Finish strong!** After trainings have taken place, make sure that trainers are engaged through the launch. There should be training materials available for end users both digitally and physically to reference when they have questions. Plan to have trainers walk around the floors or available virtually for at least the first week of launch. Since they have been involved from the beginning, they know the system and can talk end users through complex situations. Trainers should be available in addition to trained super-users and can act as great go-live support.

Training is just one piece of an EMR go-live, but it is a critical component to a successful implementation. Make sure your organization and end users are prepared for coming changes. If your organization is interested in assistance with training or any other phase of an EMR go-live, please [reach out to Trexin Consulting!](#)



This TIP was written by Kenzie Schumaker. Kenzie welcomes comments and discussion on this topic and can be reached at mackenzie.schumaker@trexin.com.