

# BUILD YOUR EHR SYSTEM FOR SUCCESS

*Eight tips to help you prepare for the build phase of an EHR implementation.*

Every implementation consists of a build phase. The build phase is not only time-intensive, but requires a large number of resources from your organization. For most companies, when we describe the build phase, it is often owned by developers. However, in the Electronic Health Record (EHR) space, we often see analysts completing the build based on the EHR system and the customizations required by clinical and revenue cycle end-users. Given the complexity of the systems and their critical functionality for patient safety - it is important that build is done right.

There are many things to consider before getting started with the build phase and while going through the build process. To help your organization build correctly and on-time, check out the below tips:

1. **Get clear business requirements** - Business requirements are typically associated with agile projects, but even if your organization is not utilizing the agile methodology, this is critical. Business requirements should be gathered during the discovery phase of a project and will help shape the build. Key end-users and stakeholders should be involved in this process in order to build a system that will function as needed.
2. **Document all business requirements publicly** - After each discovery or requirements gathering session, decisions should be documented and shared with your SMEs. Documentation is needed to eliminate scope creep, while also ensuring the build will meet end-user needs. Public documentation of these requirements can also eliminate the need for rework or to back out the build.
3. **Set realistic timelines** - Builders work hard and there is a lot of work to be completed and moving parts to keep track of during the build phase. Having ample amount of time to complete the build provides the opportunity for builders to deliver high quality work. If you are under strict timelines, possibly due to a sunseting system, then be realistic about the amount of work builders are taking on and consider limiting customizations for the initial launch.
4. **Test as you go** - Testing is a critical aspect of any implementation and you do not need to wait until the testing phase to get started. Testing as you build allows you to resolve issues in real time while the build is still fresh in your mind. Spending the extra time now will pay off once you get into your next phase.
5. **Keep track of the records you touch** - Builders will be creating and customizing a large number of records that will need to move through the environments as you progress through the implementation. Having these records handy allows you to easily troubleshoot and ensure you are not touching others' build incorrectly.
6. **Make build materials easily available** - Regardless of the experience of the builder, they will always need to learn (or at least a refresher of) the newest system settings, so keep materials in an easily accessible, shared location. This is including, but not limited to, procedure guides and FAQs. Wherever you keep these materials, make sure they stay up-to-date with each release.
7. **Ensure communication between builders and shared objects** - Several objects will be shared across teams and will be continuously edited throughout the implementation. It is critical that only one team is touching an object at a time and that the changes are communicated to all teams to avoid inappropriate or conflicting updates.

8. **Collect feedback continuously throughout build** - For those familiar with an agile process, this will not be new to you. However, regardless if you are following agile or waterfall methodologies, this can prove to be valuable. Continuous and early feedback allows your end-users to influence build and prevents rework. These end-users can also become great champions for your project as you continue through the implementation.

The build phase is the backbone to a successful implementation, so it is important to spend the time and get it done correctly. Provide your builders and organization with the materials and skills to prepare and complete the build. Continuously look for updates to the system that may impact any of the build you are working on.

If your organization is interested in assistance with the build phase or any other phase of an EHR implementation, please [reach out to Trexin Consulting!](#)



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