

# TIPS FOR TESTING YOUR EHR IMPLEMENTATION

*Eight ways to ensure your system will work successfully at launch.*

For any system to be successful, it must work. This is especially critical when dealing with Electronic Health Records (EHR). EHRs hold patient protected health information (PHI), which assists medical professionals in providing the right course of treatment for their patients. In emergency situations where a patient is unable to provide their own information, this may be the only source of data that caretakers have. In addition to allowing providers to deliver life-saving care, the information in the patient EHR allows medical professionals to spot patterns that may help find unknown illness and even provide a more tailored treatment plan, resulting in improved patient care and satisfaction. To receive the benefits of an EHR system, it needs to be working as efficiently and seamlessly as expected. One of the best ways to ensure accuracy, is by testing.

Testing is a vital part of every effective system. There is no one size fits all when it comes to testing, but there are ways to ensure your organization is testing diligently. Testing should be done for every EHR implementation or upgrade your organization goes through – regardless of size. Check out the testing tips below to ensure your organization has tested for success!

1. **Plan appropriately for testing** - There needs to be significant up-front planning that goes into the testing phase. For example, script creation, tracking mechanisms, retesting windows, team collaboration, and more. Given all the variables and stakeholders involved in testing - it is important to start planning early. As soon as your build starts, it is a good idea to start thinking about testing. Having rules of the road, timelines, and expectations communicated early, can help alleviate stress and get your team started on time.
2. **Have your builders contribute to and edit test scripts** - Depending on the vendor you work with, end to end test scripts may be provided. However, no one understands your organization specific workflows as well as your builders. Have your teams work together to create and update end to end scripts to test your specific workflows with real life scenarios.
3. **Test as you go and then test again** - Your organization should plan to dedicate several weeks at the end of build to testing. Regardless of the dedicated time, builders should not wait to test. As you build, builders need to test the functionality is working as expected. Taking a few minutes as you go can result in a lot of time and effort saved during testing.
4. **Retest steps end to end, regardless of if they were tested previously** - If you have tested parts of the workflow before, it does not mean you can skip over those steps when working through your end-to-end scripts. Anytime we make a change in the system, the functionality can be impacted. Due to the importance of the data, it is essential to test the workflow from beginning to end.
5. **Track testing and testing issues** - Your organization will have numerous scripts and scenarios they are testing, so it is important to stay organized and to have these well documented. Test scripts can be referenced in your decision to “go” or “not go” live on time and to confirm specific functionality is working correctly. It can also help with future testing, as similar issues may arise, and it can help guide you on where to start troubleshooting.

6. **For scripts involving multiple teams, get all testers in one room** - As we see people return to work, this is a way to streamline your testing efforts. Having all teams involved in a room, makes handoffs and troubleshooting much more seamless. Instead of putting a script on hold while we wait on an email or ticket to be updated, builders can actively troubleshoot in real time.
7. **Do not be short on your testing timelines** - Testing often takes a lot longer than planned due to unexpected errors. Remember it is better to be thorough and find issues during testing, than to go live with a broken product. Depending on the scope, testing may take multiple weeks or even months. I would recommend always having at least three weeks, even for an add-on.
8. **Make testing fun** - If you are going live on a brand new EHR, the testing phase may be several months long. Make it a fun experience for your testers. Plan rooms for everyone to get together to work on scripts, provide snacks, and have the script tracking up in the room for full transparency. Consider having awards at the end for your testing phase for items like “most scripts tested” or “most bugs fixed”.

To ensure a successful implementation, I encourage you to put a strong emphasis on testing. It is always better to find errors early and in the test environment than once in production. Provide your team with the time and scripts to thoroughly test your system. It can even be helpful to have some of your end users do a few test cases before your release. If your organization is interested in assistance with testing or any other phase of an EHR implementation, [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](mailto:mackenzie.schumaker@trexin.com).

---