HOW TO DISCOVER YOUR WAY TO A SUCCESSFUL EHR IMPLEMENTATION

Eight ways to ensure your team has a strong start for your implementation.

Getting started with something new is always difficult and installing an Electronic Health Record (EHR) is no exception. If going through a brand-new implementation, your project could involve over 15+ departments and teams all needing customizations to continue delivering excellent care to their patients. It is important to lead discovery sessions at the beginning of your implementation to ensure you know all requirements for your teams.

Discovery sessions should be more than just one or two meetings with the teams – but really digging into what they need to be successful in their practice. Below are eight tips for the discovery phase of your implementation to help with a strong kick-off.

1. **Identify the Goals of the Departments -** Each department is going to have a different goal of the implementation. It is important to identify those goals and determine who will be using the system and what types of patients will be most impacted with the change. Patients should be at the heart of each implementation and having a goal will help keep teams focused and will lead to a more defined scope.

2. **Identify Key Stakeholders -** The stakeholders you involve throughout the project will be extremely influential. These stakeholders will make some of the key decisions for their departments and will be representing their teams. The stakeholders identified should be well respected among the team and have a good understanding of the team's needs.

3. **Start with Questions, Not Answers -** It can be easy to start with what has been done before and what the existing system can do out of the box. However, once you show that, people tend to start thinking of all the ways it will not meet their unique workflows. Start with getting to know the teams, dig into their answers and get an understanding of their current workflows. Ask for examples and to see current workflows to help deepen your understanding.

4. **Ask Why and Then Ask Why Again -** When learning about team workflows and digging into how departments operate – narrow into the why. Why does the team operate that way? Is there a reason a certain workflow is better than another for patient care? Is it a system limitation? This will help determine how you should approach changes with the team and which changes will be more welcome than others. This will also allow you to prioritize the customizations for initial go-live versus post-launch enhancements.

5. **Show Images and Examples -** It can be hard to imagine what a new or different EHR system may look like – show end users examples and share how other organizations have done it. Showing examples allows end users to provide detailed feedback and ensures you are aligned on what you are discussing. Learning how other organizations have done it can be helpful, especially if they have contacts they can reach out to or if they are known for being successful in the field.

6. **Document All Information** - Discovery includes a lot of details and information coming in at once. It is important to document everything that your Stakeholders share with you and publish it. Publishing it allows end users to review and verify that you captured all the facts and workflows accurately. This will also provide a valuable resource for you to reference as you continue in the implementation and will help you provide credibility to your end users.

7. **Publish Scope and Requirements** - Along with documenting notes and information you gain along the way, it is extremely important to publish your scope and the high-level project requirements in a visible location. In any project it is easy to fall into scope creep as end users want additional functionality but having these documented from the beginning can help your builders and project managers navigate those tough conversations and reference the plan for launch.

8. **Get the Group Excited!** - Implementing an EHR is hard work, but it is an exciting and transformative time for your organization! You will need to rely on your stakeholders and work together throughout the install, so get them excited at the very beginning. If they are all in on the changes coming, it will also spread excitement to their teams. This leads to an overall more positive view on the project.

Discovery will help set the stage for the rest of your implementation. Focus on gathering the requirements and building your relationships with key stakeholders. Learning about why things are important to end users will guide you on the right path for build. If your organization is interested in assistance with the discovery phase 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.