



An EHR Checklist

A Process Checklist for Planning Your EHR Purchase, Installation, and Implementation

August 1, 2009

Prepared by
Adam Shlager
Manager, Health Systems
Massachusetts Medical Society
Physician Practice Resource Center
860 Winter St.
Waltham MA 02451
800-322-2303 x7702
ashlager@mms.org

This information is intended to serve as a general resource and does not constitute legal advice. If you need legal advice, please consult an attorney.

An EHR Checklist: A Process Checklist for Planning Your EHR Purchase, Installation, and Implementation

	Staff Responsible	Due Date	Completed?	Assistance Required	Next Steps
Nine to 12 months before Go-Live					
Leadership on board					
Review proposals					
Select the vendor — place deposit					
Determine go-live dates					
Schedule vendors, trainers, implementation consultant					
Evaluate existing PM system					
Six to Nine Months before Go-Live					
Develop EHR leadership team					
Map workflow for automated processes, e.g. check in, encounter documentation, lab results, etc.					
Database review and site assessment					
Begin ROI process, Define elements					
Collect and define all paper forms, mail to EHR vendor					
Identify top 10-20 chief complaints and most frequently used elements of billing/coding forms					
Identify hardware needs					
Three to Six Months before Go-Live					
Install hardware					
Build referral communities (clinical, surgical, psychosocial, nutrition, family counseling)					
Evaluate customization requests					
Evaluate readiness of physicians and mid-level staff					
Schedule staff training					
Make decisions about scanning documents, What is necessary - approximately 5% of documents are used to assist in the continuity of care					

An EHR Checklist: A Process Checklist for Planning Your EHR Purchase, Installation, and Implementation

Verify installation timeline with vendor					
Inform patients about the new system and explain the benefits of moving to an EHR					
One to Three Months before Go-Live					
Build and test interfaces, e.g. Lab, e-Prescribe/e-Fax, Imaging, Radiation, Hospital					
Test go-live: begin building patient records					
Test PM with go-live					
Adjust patient schedules					
Communicate all processes to staff					
Go-Live to +30 days					
Customize templates, short lists as needed					
Reduce patient load					
Reward					
Assess, recheck					
Meet with staff, gather feedback from front line staff					
+30 to +120 Days					
Compare templates with other providers within the system					
Build a common internal dictionary of your own terms					
Share protocols among clinicians					
Join a user group with the same sub-specialty and ask for help when you need it					
Call the vendor if you have any problem. There is no way they can help if you don't let them know the nature of the problem. Vendors want to keep you happy.					