



EHR Project Plan Review Checklist

The goal of this tool is to help guide eligible primary care providers through implementation of an Electronic Health Record (EHR). This is not an exhaustive plan, but rather a guide to help navigate the major milestones that most practices must meet. For a more detailed analysis, consider hiring a technical service consultant, available at discounted rates in the RI REC Vendor Marketplace.

Practice Name: _____
 Reviewed Check list with (name/s): _____
 Date(s) Reviewed: _____
 RI REC Relationship Manager _____

Practice Self Assessment

	Important Steps	Notes/Planning/Timeline
<input type="checkbox"/>	What are your anticipated dates to: Implement EHR? _____ Attest to Meaningful Use? _____	
<input type="checkbox"/>	On a scale of 1 to 10, what is your comfort level that your practice will: Implement EHR? _____ Attest to Meaningful Use? _____	
<input type="checkbox"/>	On a scale of 1 to 10, what is your comfort level that your practice will be able to dedicate time and resources to: Implement EHR? _____ Attest to Meaningful Use? _____	

Additional Notes:

For questions about Rhode Island Quality Institute's Regional Extension Center (REC), please call (888) 858-4815, e-mail RIREC@riqi.org or visit DocEHRTalk.org.



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	Important Steps	Notes/Planning/Timeline
<input type="checkbox"/>	Create Meaningful Use (MU) Strategy: <ol style="list-style-type: none"> 1. Start with RI REC's MU Strategy Packet 2. Determine Eligibility (Medicare, Medicaid, neither) 3. Discuss potential incentive payments & potential penalties 4. Create MU Strategy: <ul style="list-style-type: none"> <input type="checkbox"/> Choose Target Date to Attest to Meaningful Use: _____ <input type="checkbox"/> Choose measures <input type="checkbox"/> Assign resources to create a plan and manage project 	
<input type="checkbox"/>	Create e-Prescribing (eRx) Strategy: Are you currently e-prescribing? If not, are you aware of the Medicare penalties for 2013, 2014 and beyond?	
<input type="checkbox"/>	Assign Physician Leader & Project Manager from Practice (often same person): <ul style="list-style-type: none"> <input type="checkbox"/> <u>Physician Leader</u>: communicate early & often to entire staff; consistently encourage, lead & support entire project <input type="checkbox"/> <u>Project Manager</u>: responsible for all aspects of project, including managing all 3rd parties (EHR Vendor, consultants, REC, payors, etc.), ensuring staff are informed & trained, staff scheduling at Go-Live, etc. 	
<input type="checkbox"/>	Request Quotes (RFPs) from Technical Service Consultants (TSCs), as needed: TSCs are available to guide you through all phases of EHR selection & Implementation, IT support, Training and Practice Optimization: http://doehrstalk.org/selecting-ehr/vendor-marketplace-participants#tsc	
<input type="checkbox"/>	Attend Kick Off meeting: Attend meeting or conference call with EHR Vendor and any consultants involved.	
<input type="checkbox"/>	Receive Implementation Plan from EHR Vendor (copy Relationship Manager)	
<input type="checkbox"/>	Verify Implementation Plan provided by vendor includes: <ul style="list-style-type: none"> <input type="checkbox"/> clear dates/timeline agreed to by all for: <ul style="list-style-type: none"> • PMS Go-Live Date: _____ • e-Rx Go-Live Date: _____ • Training Completed Date: _____ • EHR Go-Live Date: _____ <input type="checkbox"/> dedicated resources/staff by both vendor & practice <input type="checkbox"/> sufficient training (before and after implementation) <input type="checkbox"/> a plan for meeting selected Meaningful Use measures <input type="checkbox"/> a plan for using or creating templates for ~5 standard visits <input type="checkbox"/> a plan for migrating chart data (What? Who? When?) <input type="checkbox"/> a plan for temporarily reducing workload or staggering implementation <input type="checkbox"/> a plan for IT Infrastructure, including PC, server and network needs <input type="checkbox"/> a plan for interfaces with labs, KIDSNET, etc. <input type="checkbox"/> a plan for service level agreements for ongoing maintenance & support <input type="checkbox"/> a plan for complying with Privacy & Security 	
<input type="checkbox"/>	Regularly Track Timeline & Ensure Deliverables are met: <ul style="list-style-type: none"> <input type="checkbox"/> Give practice staff time to regularly plan, track deliverables & train all staff for the implementation <input type="checkbox"/> Measure progress at each phase (and celebrate each success!) 	
<input type="checkbox"/>	Complete EHR Implementation: <ul style="list-style-type: none"> <input type="checkbox"/> Are you live on the new EHR for all providers? <input type="checkbox"/> Are you E-prescribing and Quality Reporting through your EHR? 	