



## **Surviving the First Six Months with Your EHR**

Especially in the early stages of implementation, the transition to using an electronic health record (EHR) can be challenging. Preparing for the adjustment period is essential to surviving the first six months.

### **Create implementation goals**

The most successful implementations have a goal for when paper will be removed from the workflow. Practices typically choose a date, (eg, three months after they “go-live,” or set a number of patient visits, (eg, two), before you go paperless. Paper charts usually remain at the practice for at least a year before moving to a secure storage facility, if necessary. Lab reports and other important documents that are not available electronically can still be scanned into your EHR as necessary.

*What works best will vary from office to office—just be sure to set a date to go paperless.*

### **Prepare for slower productivity during the transition**

The transition from paper to electronic records requires dedication and preparation. Expect challenges and realize that you and your staff will work slower than normal during the initial adjustment period. Because it can be stressful to maintain your standard patient levels, plan either to adjust the number of patients seen each day or to work more hours while getting comfortable with your EHR.

#### **Sample transition schedule:**

<u>Week #</u>	<u>Patient schedule at</u>
1	50%
2 & 3	75%
4	75-100%
5	Back to 100%

*“Super-users” support other staff and answer questions after the implementation.*

### **Develop “super-users”**

“Super-users” or “champions” are in-house providers and staff who have an intricate knowledge of most aspects of the EHR. They work through any barriers or kinks in the system first, and their expertise allows them to successfully train and support other users. A small practice may have only one super-user; a large group practice may have a core group of individuals from the front desk, nursing, and clinical staff.

### **Take the time to try every function**

Realizing all the benefits of your EHR takes personal time and commitment. There are efficiencies in the system that many providers may never recognize or learn. Each shortcut saves a few clicks or steps that allow you to get your work accomplished more efficiently. Vendors don’t know your group as well as you do, so plan to invest the time necessary to customize the system for the needs of your staff and practice.

## Maintain a positive atmosphere

Understand that staff will have a range of feelings about adopting an EHR—from excited and willing to skeptical and scared. While setting deadlines and having a physician champion or super-user will help keep everyone on board, it is important also to make time for celebrations when you reach important milestones. Include all staff in evaluating vendors during the selection process and provide food during training sessions.

***Distribute updates and tips; schedule time to discuss the implementation; and let everyone know how to get help.***

Once your EHR has been implemented, maintain an open, positive environment with scheduled time to discuss the implementation and any changes in strategy. Send e-mail messages to all staff with important updates and user tips. Decide who on your staff is the contact person for questions and immediate needs.

## Use all your vendor's services

Make sure you can access all the services included in your contract. Determine your vendor's best contact person, contact method, and the hours that help is available. Decide who on your staff should be the main contact with the vendor. Make sure everyone in the office understands the new workflow. Check if your vendor offers user groups and online user forums—these are great ways to hear from other providers about what functions they use and what shortcuts and solutions they have found for common problems.