



# The EHR Checklist: Critical Steps to Consider Before You Go Live

By First Insight Corporation

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*Investing in optometry and/or ophthalmology practice management and certified EHR software is one of the most significant business decisions you'll make. Before you take the leap, it's important to factor in several critical steps that can make or break a successful installation.*

## Select the right hardware, software and ancillary equipment

- Always refer to your EHR vendor's hardware and software system recommended lists. Only use equipment and operating systems that your EHR vendor supports and tests.
- Use high-quality hardware and exceed hardware minimum requirements (processor speed, hard drive space, RAM, etc.) to stay ahead of advancing technology. Focus on your future needs, not just immediate.
- Discuss ancillary equipment requirements with your EHR vendor before you purchase equipment, such as high-output laser and label printers, barcode, insurance card and document scanners, and high-density removable backup devices.
- Hire a Microsoft® certified IT Professional (MCITP) technician to assist you with all installations, networking, and upgrades, and always follow up with references.
- Ask your EHR vendor if your diagnostic equipment is compatible with your EHR system and can easily transfer readings to a patient record.

## Create a backup and recovery plan

- Move to a cloud-hosted environment that offers unlimited EHR software updates and automatic backups. By moving to the cloud, you can eliminate thousands of dollars by not replacing workstations and servers every few years.
- Before you select your backup devices, consult with a certified hardware and networking technician about the backup data size you will need, and how to arrange for backup and disaster recovery.
- Consider using a URAC HIPAA Security Business Associate online data backup, storage and recovery provider. Data is highly secure, stored off-site and kept current, and it is easily accessible to restore. The automated process will reduce the need for additional hardware, software, and staff to perform the backup process, which is critical to running a successful business without costly interruptions.
- Backing up all your data (not just patient files) is the least expensive insurance policy you will ever have. Have at least one local backup and arrange for offsite storage of your backup media files. Without data backup, recovery is

impossible. And without a recovery plan there is no guarantee that your patient data backup will make it through the recovery process.

- Computer failures can happen for a number of reasons. User error is the number one reason for data damage, loss or corruption. Hard drives are mechanical devices, just like an automobile, and they will eventually fail. Disastrous and catastrophic events, such as fire, flood, or any naturally occurring storm can be a nightmare. And failures can also happen through electrical outage, a virus or deliberate data hacking.

### **Plan for installation, training and ongoing support**

- Invest in expert onsite training for you and your staff—factor this into the cost of your EHR software. Select an EHR company that has a complete ongoing training package and customer support, including early morning and Saturday support.
- Close your office the first day you install your new software; reduce your patient load the following day.
- Book appointments lightly during your initial onsite training so doctors and staff can focus on a “hands-on” approach.
- Avoid a long delay between training sessions and the go-live date.
- Give staff time to get used to the new software; don’t learn too much too quickly while juggling a full patient schedule.
- Implement modules gradually, starting with the basics, such as scheduling and billing.

- Provide on-going training and support. Make sure staff knows where they can get answers to questions; whether through training guides, an office power user or vendor customer support, such as toll-free support, online chat support, email, webinars, computer-based trainings and personalized phone trainings.
- Put a label on each workstation with your software vendor’s “help desk” phone numbers, emails or online support contact information.

### **Free MaximEyes practice analysis**

At First Insight, we think a successful EHR and practice management system installation starts by understanding your objectives. By learning about your current challenges and required workflows, we can create a detailed project plan that walks you through implementation, system and hardware requirements, optional office modifications and performance measurements.

In fact, we think this legwork is so important, we’re happy to provide you with a free practice analysis to help you create a plan of action and determine your potential return on investment.

## **GET STARTED NOW**

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