Successful EHR Implementation: It's More About Managing People

By First Insight Corporation

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*Now that you've decided to implement an EHR and practice management system in your optometry or ophthalmology practice, don't forget to focus on one of the most important requirements for a successful outcome—**selecting your EHR implementation project team**.*

By choosing the best internal leadership team, focusing on good communications, creating a detailed project plan, setting realistic measurable goals, and devoting sufficient time for deployment and training, your move to a new EHR system can be a smooth transition for your eye care practice.

Moving to a new EHR system takes time, patience and commitment. As with any new process, it often requires a change in employee attitudes and behaviors. Even though your staff may agree with the concept, several may have a low tolerance for change. "*People don't resist change. They resist being changed*," said Peter Senge, author and business strategist.

Poor planning, poor communication, and poor training can lead to unwelcome results if you set unrealistic expectations and close the communication gap with your staff. W. Edwards Deming said, "*Individuals don't accomplish anything, teams do.*"

How can you get off to a good start? **Let's examine three critical steps—planning, communication and training—**that will guide you as you select your team and transition to a new EHR system.

Step 1: Planning

- **Designate a project manager** (doctor, office manager or office administrator). This person should have the skills, training and time to form, lead and facilitate groups. The project manager should develop the project plan, coordinate and track the implementation issues, deficiencies, decisions, and tasks assigned by your team members.

- **Form a project team/committee** with people who will embrace change, contribute enthusiastically, and have the respect of their peers. Implementing an EHR system should not be driven solely by IT—implementation requires the involvement and commitment from every level of your practice.

- **Define and set realistic measurable project goals and objectives**. Prioritize them based on what will provide the most value to your practice.

- **Identify what resources you need,** including budgets, people and timelines. Develop a clear definition/goal of what you want the EHR system to accomplish. Make decisions based on the process that supports your goals and objectives.

- **Analyze every function of every job** to understand how your staff accomplished those tasks with your old EHR and practice management system.

- **Develop a comprehensive data map** of office workflows and processes, including office modifications, hardware installations, software configurations, ophthalmic equipment and image management integrations, backup systems, and entering old patient data into the new EHR system.

- **Decide if you want to move to a cloud-based environment:** Ask the EHR vendor if your data will be encrypted on your own database and not shared with other practices. Does the software have multi-platform capabilities? Will the software scale from a small office to a large multi-physician, multi-location? You never know when your business may expand.
- **Talk with at least one or more practices** that implemented the software you are considering. Meet with doctors and high-level users and talk about their experiences.

- **Play around in the software vendor's EHR sandbox (working demo of the software).** Ask the vendor to allow you to enter data. This can be done with the vendor giving you control during the online demo.

Step 2: Communication

- **Energize your staff.** Always maintain momentum and enthusiasm or you might see some resistance from staff.

- **Listen to your staff** and let them help you develop a solid plan. People will support what they create.

- **Communicate with your staff.** Ongoing communication is essential, so meet with your team at weekly staff meetings. Use email to develop and refine the implementation plan, discuss issues and update the progress.

- **Resolve conflicts effectively by setting goals.** Let your team be honest with their concerns and recommendations. People want to be heard. Agree to disagree—healthy disagreements can build better decisions.

- **Reinforce that you can't do this alone**. Offer incentives to your staff and address "what's in it for them." If you commit to a success EHR rollout, your staff will move forward with a more positive approach.

Step 3: Training

- **Invest in your staff and prepare them for change.** Keep an open mind that everyone may not be able to or is willing to adapt to change.

- **Assess computer skills**; some staff may need to attend a basic computer class.

- **Give your staff time to learn the new software**. Introduce new modules over a four to six-month period. If you try to do too much too soon, people will get frustrated and give up.

- **Invest in onsite software training for you and your staff**. This is not an area where you want to scale back and save money. Make sure your staff knows where to find answers to their questions.

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

Schedule Demo: 800.920.1940, ext. 6969
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