

# Health IT quick reference

Implementing and deriving value from health information technology (IT) is a challenge for most practices. While there is great potential for health IT to improve efficiency, quality of care and patient safety in physician practices, reaping these benefits relies on the effective use of the technology. That's why it's important to take time upfront to plan and understand exactly what you are trying to achieve with health IT. The following information will help you begin to plan for a successful health IT implementation.

## Four steps to health IT adoption

Progressing through each stage—planning, selection, implementation and maintenance—ensures greater opportunity for getting the most value from your health IT investment.

### Step 1: Preparation

Health IT will impact multiple aspects of your practice: daily practice operations, people who will implement and operate the technology, technology (current and new), costs and revenues are just a few of the areas that may be affected.

A closer look at daily operations likely changed by health IT:

- Provider workflow
- Nursing workflow
- Billing process
- Front desk process
- Scope/complexity of IT infrastructure
- Revenue/expense mix

To best deal with the inevitable changes, begin by:

#### 1. Defining your needs

Answer questions such as:

*What do you want the technology to do for you, your patients and your practice?*

- Paperless office
- Reduction in transcription expenses
- Better access to charts and more legible data
- Meaningful use

*What are your constraints?*

- IT resources
- Clinical/practice staff support
- Project management skills
- Capital

#### 2. Determining your practice readiness

Start by answering such questions as:

- *Are the physicians and staff supportive of health IT?*
- *Is there a physician leader committed to making health IT work for your practice?*
- *How does health IT implementation fit with other practice priorities?*

#### 3. Talking to your peers

You stand to benefit greatly from other people's experiences and lessons learned while implementing and using health IT.

#### 4. Mapping key clinical and administrative processes

Documenting current processes during the planning phase will allow you to identify and more easily eliminate health IT systems that don't meet your needs. You will revisit and revise these workflows during and after implementation.

Key tasks include:

- Ask everyone in your practice to make a list of their daily tasks and duties. Ask them to identify which tasks are tedious or repetitive, and then rank them by complexity.
- Make a master list of everything your practice currently does on a daily, weekly and monthly basis; use this list to evaluate the software.
- Calculate completion times for each task; understand which tasks could easily become electronic.

- Create diagrams of how information flows throughout your practice.
- Conduct a few model patient visits. Identify snags and slowdowns—walk the charts through each handoff and document where modifications are needed.

### 5. Personnel planning

A successful implementation requires practice staff to fulfill certain rolls with specific responsibilities. Depending on practice size and skill sets, one person may fulfill more than one role, but generally key roles include:

**Physician lead**—defines and sells vision; identifies requirements and selects health IT system; help build and enhance health IT; resolves conflicts

**Project lead**—assists with health IT system selection; manages coordination of software, hardware, special projects and training activities; helps train and troubleshoot

**Super user**—trains existing and new staff; assists with upgrades and troubleshooting; implements special projects

**IT analyst (may be subcontracted)**—builds and supports health IT network, deploys hardware (servers, PCs, printers, scanners, electronic faxing, etc.); performs software configuration, hardware configuration, special projects such as interfaces

Remaining staff are key project stakeholders and should provide knowledge to the health IT plan and vision. They may be responsible for special tasks as required by the project plan.

### 6. Technology planning

Does your practice have the necessary technological infrastructure—hardware, software and network connectivity—to support the health IT you are considering? Think about electronic data you want to accept into and send out of your practice (e.g., demographics, laboratory results, radiology reports, hospital summaries, medication histories and electronic prescriptions).

Consider what technology you have and if you should keep it. Depending on your current capabilities, you may need more:

- PCs and workstations (think about desktops, laptops, tablets)
- Servers (consider cost, space and support)
- Printers (location and function are important; consider reports vs. Rx printing)
- Expanded computer networks to connect everyone in the practice

You may also need new interfaces and equipment such as a scanner.

Think about how you plan to secure the new technology both physically and in terms of safeguarding and preventing unattended browsing of personal health information as well.

### 7. Capital planning

To minimize surprises, develop a detailed budget outlining expenses in each category:

- Health IT software and related services (includes interfaces)
- Hardware/network and related services
- Internal labor expenses (time spent on training, data-entry, etc.)
- Temporary decline in provider productivity
- Financing expense

## Step 2: Selection

Selecting a system can be a formal or informal process, depending on your preference.

Consider the following when selecting a health IT vendor:

- Prepare technical requirements from your workflow analysis and other practice needs and match them to the products and services a vendor(s) offers.
- Develop evaluation criteria to maintain consistency when ranking vendors (e.g., cost, usability, integration with current technology, depth of training and technical support).
- Involve representatives from all areas of your practice in the decision process.
- Consider certified technology vendors, particularly if you plan to participate in a federal EHR incentive program (i.e., CCHIT, InfoGard Laboratories Inc., Drummond Group Inc., ICSA Labs; SLI Global Solutions, and Surescripts LLC for ePrescribing and privacy and security).
- Research and create a short list of vendors that meet your technical requirements. Start by asking colleagues for recommendations.
- Prepare for health IT vendor demonstrations with detailed questions and requirements.
- Ask for—and follow up on—referrals, testimonials and recommendations from vendors.

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### Step 3: Implementation

You will work closely with your health IT vendor during the implementation phase to determine your implementation strategy and schedule. However, you can begin to prepare by thinking through the following tasks:

- Plan your exam room and office setup according to your office workflow. Make a diagram and change, or accommodate, the flow of information from task-base to task-base.
- Create a plan for how to handle paper charts and a system for archiving records (if converting to EHR). Paperless timeline examples include:
  - No scanning—plan to pull paper chart three times after full use of EHR is accomplished. Date stamp each time used and after the third pull, file it.
  - Have provider identify key portions of chart to scan during patient's first electronic visit, scan it and file.
  - Pull next week's appointments and scan key portions before
- Patient's first electronic visit, give chart to provider for first visit only, then file.
- Prepare a business continuity plan in case of a natural disaster or power outage.
- Determine how you will work with your staff and your patients in implementing a new process.
- Consider how long you may need vendor-provided technical support and trainers on-site after implementation. Plan financially to use them for an additional period of time, if you believe your practice will need it.

### Step 4: Maintenance

Simply implementing health IT is not enough to guarantee success. There is ongoing work required of everyone in the practice to ensure optimal use and return on investment.

Revisiting project goals and measuring progress according to specific key performance indicators can help guide improvements. The following list can help guide your metrics.

- Optimize practice workflow
- Increase office staff productivity
- Revenue increase (e.g., patient volume, reduced administrative denials, increased reimbursement)
- User training for all staff
- Use of system by all staff for daily tasks
- Reduction in unbilled services
- Improved uptake in chronic disease management
- Reduction in calls with pharmacies and benefit managers
- Patient adherence to prescribed course of therapy and preventative care recommendations
- Patient satisfaction (i.e., improved patient retention)
- Supply savings