

EMR/EHR Software Implementation: Project Planning

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February 1, 2010

Overview

The decision to implement an electronic health record (EHR) is one of the most important decisions for your health care organization or physician practice. The transition to an EHR system changes everything. Nearly every business process is impacted with the EHR implementation, including registration/admission, scheduling, documentation, billing, patient follow-up, and communication within and external to your organization. Considering the profound change this implementation generates, your organization needs a clear road map to ensure a successful transition that will capitalize on the quality, safety, financial, and process benefits of the implementation.

Getting It Done Right

Successful and effective implementation requires hard work, careful planning, and diligence. In 20 years of implementing EMR and clinical information systems, we see patterns in the successful deployments. There are key elements to successful implementation, including adoption approach, change management, process redesign, testing of the application, hardware, and interfaces. This article focuses on one area crucial to success—project planning.

Project Planning—What Should You Do?

Best practice in management of an EMR implementation has a vendor project manager with broad knowledge of the EMR application working with a project manager (PM) from your organization to develop a comprehensive project charter, project plan, and communications plan. Both PMs should have experience with multidepartment implementations. If the PM skill is not available in your organization, often a third-party consultant project manager is hired to plan and manage the effort. When leveraging a consultant, *always* identify an internal leader in your organization who will be mentored throughout the implementation.

At the end of the EMR project, *someone* in your organization will need to own the support and management of the application. A consultant project manager who mentors an internal resource puts your organization on track for success. Too often, we see organizations struggle after an implementation because much of the knowledge walks out the door with the vendor team and the consultant.

What Happens After the Sales Cycle?

Typically, after an organization has selected an EMR vendor, there is excitement about the upcoming system. There is often little or limited assistance with regard to planning. Usually the contract negotiation process takes longer than anticipated, and you feel rushed or excited to begin. EMR vendors will often share with you and follow work plans they created, which typically focus *heavily* on what the vendor needs to do versus the total effort for everyone involved. We find a few vendors who collaboratively project plan with organizations in development of a single *comprehensive project plan*. Even fewer

vendors routinely document a project charter and communications plan for the implementation.

What Can Happen to Your EMR Project?

So what happens in this scenario? Your organization does not have a clear understanding of the scope of effort or complete project plan or a clear implementation road map. You do not understand the logical order of tasks or how your organization can most effectively prepare.

The various vendor implementation specialists connect with identified key contacts in your organization, and these resources follow their plan or task list to complete configuration of functional areas. You can have multiple application specialists asking for information from many areas of the organization to complete master file and table builds. The vendor usually has an engagement manager (EM) who is overseeing your implementation. The vendor EM manages the overall effort of the various application specialists and can be the one team member who understands the big picture surrounding the implementation. Often the individual vendor team members do not have a broad understanding of the overall EMR application or understand other functional application areas. There tend to be few team members knowledgeable about the *whole* application and implementation process.

You begin to wonder how the various decisions made for configuration work together. How do the decisions affect workflows? Is the vendor defining and documenting future state workflows with clinical areas? Often little attention is paid to this critical area of EMR implementation. You can be left wondering if the infrastructure, interfaces, and hardware needed will be ready at the right time. If you have an internal leader for your EMR project, he or she can struggle to comprehend and manage all of the moving parts of the project without a clear and complete plan and the right tools to manage the project. A well-defined project charter, project plan, and communications strategy are the best way to know your EMR initiative is on time, on budget, and being implemented using best practices.

Take Charge and Do It Right!

Documentation of a **project charter** defines the project. It documents the what, how, who, when, where, and why of the project. The project charter articulates scope and approach and clearly defines measures of success that help to manage expectations for the initiative. Project risks are defined and analyzed, and mitigation strategies are developed and implemented. Typical EHR project risks are expectation, resource, acceptance, solution, and impact.

Communication planning is a critical component of the success of large projects. It involves determining what information needs to be communicated to whom, when, and how. The types and frequency of communication will vary depending on the audience, as different groups of people have differing levels of need or want to be informed.

Understanding the needs of all project stakeholders and effectively communicating pertinent data is one of the keys to a project accomplishing its goals.

Communication techniques and technology will also differ based on the type of information. There will be formal documents that outline policies, requirements, and processes. There will also be informal communication via e-mail, phone, and meetings. Designing an organized approach to manage all these differences will enhance the team's ability to make decisions, share data, educate, influence, and resolve issues.

The communications plan defines the various meetings, communications, reports, and documents used over the course of the project. It is important to be clear about the intent or intended yield of the various forms of communication. Will the communication inform, educate, or influence the reader? For example, when you provide communication to a particular audience, is the communication meant to be one-way or two-way? Are you looking to inform the audience, or do you want feedback? Is action by the reader optional or required? The plan should coincide with change management strategy. An effective communications plan can help to establish expectations and increase acceptance for the project and new software tools being implemented.

Project planning should be done using industry standard project management software such as MS Project, thereby leveraging many timesaving features for planning, tracking, and reporting project status. The project plan must document *all* of the project tasks: tasks for the vendor team, provider team, and other vendors involved in the project. The plan should encompass the entire project life cycle, from kickoff to transition of support services, and identify critical project milestones. The project plan identifies key dependencies among the various tasks. The plan is analyzed to identify risks and mitigation strategies developed. Tasks and responsibilities need to be defined within the project plan to review and manage the quality of deliverables for various project areas.

Clearly defined **project governance** is critical to the success of an EHR implementation and a well-managed project. A "RACI" diagram is well suited to identify the various project functions, roles, and responsibilities. The diagram documents who is responsible for, accountable for, consulted in, and informed in (RACI) decision making and in getting the work of the project completed in various areas. A project organizational chart clarifies who is in what role and articulates reporting responsibilities. Numerous decisions are made over the course of an EMR project; a well-thought-out, and -communicated governance structure facilitates this process.

Review of successful EHR implementations point to complete and rigorous project planning as a crucial area to ensure successful implementation of your EHR. Further, building knowledge, skills, and ability in your internal resources is vital for ongoing user support and system maintenance after the implementation is complete.

About the Author

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