implementing EHR software in your practice is certainly daunting, but it also presents a rare opportunity to evaluate and re-engineer your operations, processes, and procedures.

I often tell a short story about a young couple preparing to enjoy their first Thanksgiving dinner together, and the husband observes the wife cutting the ends off of their ham before baking it. When asked why, she can only say, “Mom did it this way.” After asking “Mom” and finding out that “Grandma did it this way,” he eventually has an opportunity to query Grandma. Much to his surprise, Grandma says that she cuts off the ends of the ham because her baking dish is too small.

That cute little tale illustrates a problem for many medical practices: They have no idea why they do what they do, and no one can remember
When the decision was made to do it the way they do it.

When a practice implements EHR, it’s a great opportunity for practice improvement because EHR touches many functions, not just the clinical ones, within your practice. Here’s a step-by-step review/re-engineering process you can use when you implement your chosen EHR software.¹

1. **Create an implementation team.** This team will manage the process and create a specific implementation plan and specific time lines. Be sure to nominate a project manager (usually a clinician and NOT a low-level employee) to oversee the implementation.
   • Create a team that includes members of other office teams.
   • Arrange for the project manager to have specific “release” time to coordinate pre-implementation decisions, meet regularly with the team, etc.
   • Make it clear that a key function of the team must be to analyze your flow and processes and to then improve on those processes.
   • Clearly define your goals for what you want the EHR to do and make decisions based on these goals.
   • Consider visiting other offices that use the software you’ve chosen so you can see how they implement ed it and to learn from their successes and failures.
   • Meet weekly to refine the implementation plan and discuss needs.
   • Allow staff and physicians to voice their concerns and fears about the implementation process so that they can be taken into consideration.
   • Create a positive environment and get everyone excited about the implementation.
   • Develop a timeline that everyone can access so that everyone knows where you are in the process and what they’re supposed to be doing.

2. **Analyze your workflow and your current processes, and redesign/modify those processes accordingly.** One of the most important steps in the EHR implementation process (and even post-implementation) is to consider the many ways that EHR impacts your business processes. In many cases, the impact is neither positive nor negative and simply requires that you consider how your processes need to be modified to accommodate the electronic flow of data. In many cases however, reconfiguring business processes leads to (often dramatic) improvements in efficiency.

   You’ll find these improvements by careful analysis and documentation of every process and job function to understand how tasks are currently being accomplished. Don’t make judgments while you analyze. Instead, look for opportunities to improve efficiency.

   Once you’ve completed your review, design new work flows that can be accomplished with the tools available in the EHR or simply involve a new process that doesn’t directly involve the EHR. Key items to include in your analysis:
   • Steps, actions, sub-processes that you would ordinarily take for granted.
   • Flow of data, paper documents, and patients. These are all interrelated and lead to an efficient or a sloppy practice. Spend the time to actually shadow a patient through the practice and do this for a number of different appointment types. Document EVERY discrete action or process. You might even want to create maps of these actions and processes.
   • Opportunities to improve efficiency; design new workflows that could be accomplished with the tools available in the EHR and develop a transition plan.
   • Peripheral hardware or systems that might have to interact with your new system, for example, bar code printers, bar code readers, printers, external data transfer.

3. **Redesign your processes, taking advantage of the things you do well and incorporate new processes (or altered processes) that help improve efficiency and allow you to incorporate electronic data flow.**

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EHR Impacts Business Processes

Process review is one key to implementing effective EHR. Here are some common processes to review:
- Check-in—forms, actions, documents
- Handoff from check-in to clinic
- Clinical documentation
  - Pre-test/H&P
  - Exam itself
  - Orders (in-office testing and offsite testing)
  - Medications
  - Handling refills
- Handling documents that come in from outside the practice
- Billing/coding/posting of charges and diagnosis
- Scheduling: making appointments for patient visits, confirming appointments, and acknowledging patients as they arrive
- In-office
- Documentation of all patient interactions
- Generation of correspondence
- Data/patient handoff to optical, contact lens/surgery scheduling

Considerations:
- One of your goals should be to handle things once or to input data only once.
- People WILL have to do things differently and it will take time for them to get comfortable with the changes.
- You might have to make changes to your physical plant to best accommodate EHR and electronic data flow.
- You might have to upgrade diagnostic equipment.
- You might have to make physical changes in your exam lanes to accommodate computers/monitors.
- Since the data will be electronic, you might need to make computers available in more places and available to personnel who might not have needed their own computer in the past (this is a small investment, compared to the efficiency gains).
- It’s helpful to map out the flow of data, people, and patients, etc., so that everyone can easily visualize the processes you’re contemplating.

If you’ve never documented your processes or created SOPs, this can be a time-consuming process, but it’s certainly worth the time and effort. Either way, your new, efficient, written processes will lead to numerous and profound benefits to your practice:
- Clear documentation makes it easier to train people on what they’re supposed to do, and it makes it easier to hold people accountable.
- Staff turnover is less disruptive because people know exactly what they’re supposed to do, and you can more easily fill in when people are out.
- You can duplicate your success if you open satellite offices.
- You’ll be far more efficient than if everyone did whatever it is s/he thinks s/he’s supposed to be doing.

Note
1. When choosing EHR software, be sure to purchase a system that has been certified for meaningful use. Certified EHR technology assures purchasers that an EHR system or module offers the necessary technological capability, functionality, and security to help them meet the meaningful use criteria. Physicians who adopt, implement, or upgrade to meaningful use of certified EHR technology are eligible for incentive payments. Physicians who do not implement meaningful use of EHR technology will be penalized beginning in 2015.

The ASCRS•ASOA Guide to EMR, developed in conjunction with the ASCRS•ASOA Health Information Technology Committee, is a centralized, one-stop source of information about EMR, Meaningful Use, the Medicare EHR Incentive Payment Process, and how to prepare for selecting/implementing an EMR system. You can download the Guide here: ascrs.org/download/gov/ASCRSASOAGuidetoEMR_Summer2012.pdf

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