EHR Implementation Overview

Getting Started
CareTracker EHR Implementation Goals

- Promote non-stressful implementation
- Mindful of physician loss of productivity
- Best practice recommendation for a new EHR practice is to implement components of EHR over time to promote staff acceptance & develop content gradually
- New practices or those transitioning from an existing EHR application may need to utilize all components simultaneously
CareTracker EHR Implementation in a Nutshell

1. Planning
2. Attend webinars
3. Identify limited items in medical record to be scanned prior to patient’s next visit
4. Create problem list, medications, allergies, immunizations, patient pharmacy and specialty information prior to patient’s EHR visit
5. Identify incremental opportunities for incremental adoption practices
   - Select “soft” live date for each component for incremental adoption, or
   - Select a go live date to implement full component utilization
6. Work with templates, develop quick text, practice
7. Document note electronically (incrementally or all at once)
8. Monitor workflow
9. Transition to CareTracker Support
CareTracker EHR – Planning

- Most important step!
- Plan, Plan, Plan and then plan some more
- Keep office informed of changes
- Work with staff for buy in
- Need everyone on board for successful implementation
CareTracker EHR – Planning

- Identify EHR project planning committee
  - Office point person
  - Physician champion
  - Meeting frequency
  - Determine projected time line:
    - Different from practice management live date?
    - Incremental adoption?
    - Building EHR content
    - Focus on cultural changes within office
    - Determine new workflow
CareTracker EHR - Planning

- Schedule physician & staff CareTracker training
  - Recorded WebEx sessions
  - Instructor Led WebEx sessions
  - Personalized Telephone WebEx sessions & weekly meetings
  - Practice, practice, practice!

- Schedule staff meetings to discuss:
  - Cultural / Workflow changes
    - Organizational change management
    - Clinical workflow process analysis
    - Office redesign
    - Clinical staff using CareTracker
  - Possible changes
    - Utilizing Clinical Today Dashboard (ToDo’s, Check In / Out)
    - E-prescribing
    - How to / who will handle lab results
    - Documenting during or after visit
    - Capturing Pay for Performance / PQRI Information
CareTracker EHR – Planning for Hardware

- Printer / Paper Needs
  - Where should they be located – near provider, front desk, separate one for controlled substances? Network versus local?
  - Is secure paper needed for controlled substances? (regular printer)
  - Alternative is to use a photo printer and your existing script paper, such as the HPC4380 Photo Printer
  - Possible resources for paper are Dr. Stuff (203) 785.8475 or www.doctorstuff.com or rxpaper.com; rxsecurity.com

- Scanner Needs
  - Used for any incoming paper and historical charts
  - Possible resource for scanning services or equipment
    Donnegan Systems: 800-222-6311, ext 306 or www.donnegan.com
  - To scan directly to CareTracker a Twain Scanner Driver must be installed; driver can be found at: CNet.com in the Download section
  - Canon DR 5010C, DR 3080C II or the DR 2580C
CareTracker EHR – Planning for Hardware

- Determine method of data entry each user desires
- Does the provider want to type use handwriting recognition, voice recognition, use quick text, or dictation?

<table>
<thead>
<tr>
<th>Date Entry Method</th>
<th>Pure Tablet</th>
<th>Convertible Tablet/Laptop</th>
<th>Laptop</th>
<th>Desk Top</th>
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<td>Type/Keyboard</td>
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<td>Yes</td>
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<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Use Stylus</td>
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<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Voice Recognition</td>
<td>Yes</td>
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<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Dictation</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
CareTracker EHR – Planning for Hardware

The CareTracker Network Requirement Form (NRF) includes the technical specifications for computers & internet connectivity:

• **Operating System:** Windows 2000/XP/Vista (Current Service Packs & Updates)
• **CPU Processor:** Pentium 4, 1 GHz or greater
• **Physical Memory:** Windows 2000 & XP: 1 GB; Vista: 1.5 GB
• **PC Monitor:** at least 17” w/1024 x 768 resolution
• **Tablet or Laptop Screen Resolution:** minimum of 1024 x 768
• **Internet Explorer:** Version 7.0
• **Speakers either attached or internal** (required for prerecorded training)
• **Microphone if using voice recognition**
• **Redundant Internet Connectivity** (bandwidth requirements on NRF)
CareTracker EHR – Planning for Hardware

CareTracker does not recommend specific devices for use with EHR because a device we recommend today will have a new model advertised & not be available tomorrow!

- Insight.com & NewEgg.com are good sites to compare different devices
- We have providers using Motion Tablets; Lenovo, Toshiba, & Panasonic Convertible Laptops, Dell, Acer, HP Laptops & PCs
- As long as they meet the technical requirements stated previously..... ;-)
Exam room options for carrying portable devices
- Stationary music stand or rolling cart
- Hang on wall, place on table or counter top
- Extra batteries, plugging in at night to charge, extra power cords for each exam room

Security Issues
- Securing or locking laptops or tablets in exam rooms or hallways accessible by patients and family

Unattended Browsers
- Need quick log on/off if the patient is in the exam room with access to any application
- For example:
  - Finger print log on
  - Card swipe log on
  - Control>Alt>Delete to Lock Screen
CareTracker EHR - Planning

- Determine if any data points are required for PQRI/P4P
  - Make sure info is captured on template and/or encounter form
- Determine reporting requirements; request any additional reports needed
- Determine need to create new Clinical Letters in CareTracker
- Discuss method or combination of methods to use for progress note data entry
  - Point & click templates
  - Quick text
  - Dictation
  - Voice recognition – any application will work
    - Dragon - Brad Sclar: sclarb@gmail.com; 303-588-4034
  - Handwriting recognition
- Discuss with Implementation Specialist the progress note format or template that best fits with data entry method desired
Point & Click Template
Quick Text Example
Dictation Template Example

Name:
Ricky Andrews
DOB:
2/6/1948
Age:
61
Date of Visit:
3/2/2009
Chart Number:
1080
Vital Signs:

Chief Complaint:

History of Present Illness:

Allergies:

Sulfa Drugs (12/16/2008)
CareTracker EHR - Planning

- Data Points to Consider Pre-loading in Application:
  - Patient Pharmacy (pre-load in PM Patient>Other)
  - Problem List (any claims billed in PM are loading this already)
  - Medications (can pre-load or obtain some from PBMs)
  - Allergies (can pre-load)
  - Past Medical, Family & Social History – new form or entering old data
  - Immunization History
  - Patient Registries
  - Specialty Needs - Examples to consider for scanning:
    - Pediatric practices: growth chart
    - Cardiology practices: INR tracking
    - Pregnancy history (OB/GYN)

- Consider who should enter data & by when will be completed:
  - Providers
  - Support staff

- May want to align this plan with historical scanning (next slide)
CareTracker EHR – Chart Preparation

Provider Identifies Items to be Entered / Scanned

Patient Name: ___________________________ Date(s): ________________

- Pharmacy entered: □ Yes □ No
- Medications entered: □ Yes □ No
- Allergy list entered: □ Yes □ No

Scanning Opportunities:

- Lab results:_____________________________________________________
- Pap smear:_____________________________________________________
- EKG: _________________________________________________________
- Mammogram: _________________________________________________
- Colonoscopy: _________________________________________________
- X-ray report: _________________________________________________
- Discharge summary: ___________________________________________
- Annual physical exam: __________________________________________
- Progress note: ________________________________________________
- Letters from consultants: _______________________________________
- Health care proxy: _____________________________________________
- Other: _________________________________________________________
CareTracker EHR – Scanning Considerations

- Scanned documents help develop electronic medical record content, but remember to limit historical scanning to pertinent information
- Flag items in chart for support staff to scan based on defined & agreed to plan but always:
  - Be consistent in naming conventions of documents scanned
  - Be consistent where documents are scanned/stored within EHR
  - Determine method, resources, & time line needed for scanning
- Paperless Timeline Examples:
  - One Example: No scanning - - Plan to pull paper chart 3 times after full use of EHR is accomplished. Date stamp each time used and after the 3rd pull, file it!
  - Second Example: Have provider identify key portions of chart to scan during patient’s first electronic visit, scan it and file!
  - Third Example: Pull next week’s appointments and scan key portions before patient’s first electronic visit, give chart to provider for 1st visit only, then file it!
Discuss Business Continuity Plan (Disasters)

- Redundant internet access is required but natural disasters and power failures can occur
- Sample items for a “Paper Day”:
  - Rx pads
  - Paper progress note templates
  - Paper encounter forms
  - Lab/radiology order forms
- Patient clinical summaries for appointment list created or printed daily & “Locally Secured”
CareTracker EHR – Attend Webinars

- Working with your Implementation Specialist identify staff members who will need to attend training
- Listen to pre-recorded Webinars, then
- Register for instructor lead Webinars, or
- Schedule personalized one-on-one training, and
- Plan to discuss questions specific to your practice with your EHR Implementation Specialist during your weekly meeting
- Practice using templates and creating quick text
- Validate learning with EHR Implementation Specialist during Instructor Led Web Session before going live
CareTracker EHR Implementation
Incremental Opportunities for Incremental Adoption

- **STEP A: Clinical Today, Messaging, & Inbound Correspondence**
  - Clinical Dashboard, Quick Tasks, ToDos, Mail, and Faxing (coming soon)

- **STEP B: ePrescribing**
  - Health History Panes: Problem, Medication, Allergy Lists
  - New and refill prescriptions
  - Order Rx paper from Dr. Stuff (203) 785.8475 or www.doctorstuff.com

- **STEP C: Using Clinical Tool Bar for Lab Orders and Managing Electronic Results Via Quick Tasks**
  - East Side Lab, Quest, Care New England, Lab Corp, Open MRI, Rhode Island MRI, Rhode Island Imaging Institute, +++
  - Orders and Order Sets
  - Results Management
  - Other Clinical Tool Bar Functions
CareTracker EHR Implementation
Incremental Opportunities for Incremental Adoption

- **STEP D: Health History Panes**
  - Learn remainder such as vital signs, history, documents, health maintenance utilization

- **STEP E: Progress Notes Preparation** (still have a paper record)
  - Identify templates to be used and build Quick Text PRN
  - **GRADUALLY BEGIN PROGRESS NOTES:**
    - **WEEK ONE**: Schedule 1 new patient per day for a week to record progress note using EHR application
    - **WEEK TWO**: Schedule all new patients to record progress notes using EHR application
    - **WEEK THREE**: Utilize progress note for 1 follow-up encounter each day; keep doing all new patient notes in EHR
    - **WEEK FOUR TO SIX**: Continue new patients and add at least 2 follow-up patient records using the EHR Application

- **STEP F: Provider Portal & Outbound Messaging**
  (to be completed)
CareTracker EHR Simultaneous Implementation
New Practices and Transitioning EHR Practices

Attend Full Series of Training – Pre-recorded or Instructor Led (4-5 days in a row, 1 hour each day, usually at 12N or 1 PM):

- Clinical Today
  - ToDos, Messaging, Schedule, Visit Capture…
- ePrescribing and associated Health History Panes
- Clinical Toolbar
  - Lab orders, lab results, immunizations, letters, patient education…
- Health History Panes
  - Pre-load patient information as identified in planning, vital signes, history, registries…
- Progress Notes
  - Templates, practice, signing, printing
- Provider Portal and Outbound Messaging (to be completed)
CareTracker EHR – Go Live

- No more paper chart
- Document electronically for all appointment types
- Continue planning meetings
  - Continuing education for employees
  - Training of new employees
  - Determine what to do with paper charts once desired information is in EHR (according to state law)
- EHR Implementation Specialist will continue to be point of contact for first few weeks of live use
- Transition to CareTracker Support Department planned
  - Importance of protecting PHI and using ToDo’s to help manage this
CareTracker EHR – Monitoring Workflow

- Identify workflow challenges; use the CareTracker EHR Task Sheet
  - Are refill requests being approved?
  - Are To Do(s) being responded to?
  - Are Lab/Radiology results being committed to the chart?
  - Are notes being signed?
  - Are visits being entered?
  - Are attachments being signed?
  - Are notes being dictated on a timely basis?
  - Are open orders followed up?

- How to maximize your EHR
  - Identify additional opportunities for efficiencies & integration
CareTracker EHR – Reporting & Measuring

Identify opportunities to improve and measure practice using features such as:

- PQRI measures
- Health history registry
- Clinical alerts
- Clinical letter writer
- Reminders
CareTracker EHR Next Steps

- Complete the Discovery Tasks
- Submit these to EHR Implementation and Training
- Start to plan and discuss forthcoming changes with all members of the office staff and all providers
- Review your calendar to identify windows for training
- Once Practice Profile is complete your Implementation Specialist will be assigned and will schedule your first conference call to document your work flow decisions and training schedule commitments
- You are on your way!
CareTracker EHR Implementation Overview

Launch the EHR Overview/General Navigation Recording

Questions & Answers?

Thank you for attending!
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