

EHR Roadmap

Practice Name: _____ Date: _____

FMQAI DOQ-IT Team Facilitator: _____ Phone: _____

Physician Champion: _____ EHR Team Leader: _____

Phase	Practice Tasks Recommended for successful movement along the EHR Roadmap	Milestone Checklist To demonstrate measurable movement along the EHR Roadmap (check the box as each milestone is completed; sign and date when all tasks in phase are complete)	Tools and Services Provided by FMQAI
Assessment	<ul style="list-style-type: none"> • Complete IT readiness assessment • Assess current workflow (identify pain points) • Begin or continue regular staff meetings (at least monthly) • Assign physician champion • Organize an EHR selection/implementation team • Assign an individual (EHR team leader) or team to lead practice changes • Commit to: <ul style="list-style-type: none"> ○ Full provider engagement to enter data ○ Workflow changes necessary to maximize results 	<ul style="list-style-type: none"> <input type="checkbox"/> IT readiness assessment <input type="checkbox"/> Readiness/next steps reviews <input type="checkbox"/> Physician champion assigned <input type="checkbox"/> Team leader assigned for practice changes <input type="checkbox"/> Current workflow processes assessed <input type="checkbox"/> Give signed participation agreement to FAFP <input type="checkbox"/> Proposed implementation target date <p>Initials: _____ Date Phase Completed: _____</p>	
Planning	<ul style="list-style-type: none"> • List goals and priorities (include functions and specific provider needs) • Translate identified EHR goals into available EHR system functions and features • Identify staff at lower levels of readiness and address their concerns • Develop a timeline and project plan • Gain support from team members and staff and prepare staff for changes <p>Optional:</p> <ul style="list-style-type: none"> • Write RFI/RFPs • Complete a cost/benefit analysis and ROI for an EHR system 	<ul style="list-style-type: none"> <input type="checkbox"/> Practice has identified goals, priorities and any staff concerns <input type="checkbox"/> EHR goals and associated system functions are listed <input type="checkbox"/> Business plan developed, includes such items as: <ul style="list-style-type: none"> - Target implementation schedule/timeline - Estimates of EHR budget and ROI - Measurable EHR goals <p>Initials: _____ Date Phase Completed: _____</p>	

<p style="text-align: center;">Selection</p>	<ul style="list-style-type: none"> • Attend structured demonstrations at Vendor Fair • Evaluate vendors and create short list of 2-3 vendors • Review EHR systems by: <ul style="list-style-type: none"> ○ Run vendor through a practice-specific case scenario ○ Going on at least one site visit ○ Obtaining at least three vendor references • Identify and select vendor for hardware, office wiring, and necessary network support for all services and products not included in EHR • Negotiate contracts including all aspects of implementation, training, and technical support • Continue workflow assessment and changes 	<ul style="list-style-type: none"> <input type="checkbox"/> Negotiate contracts and financing <input type="checkbox"/> EHR vendor selected <input type="checkbox"/> Hardware vendor selected <input type="checkbox"/> Vendor selected for office wiring and cabling needs that are not included in EHR package <p>Initials: _____ Date Phase Completed: _____</p>	
<p style="text-align: center;">Implementation</p>	<ul style="list-style-type: none"> • Draft EHR system implementation plan and timetable • Assign data manager/administrator • Assure data conversion and testing completed • Assure interfaces completed and tested for: <ul style="list-style-type: none"> • Laboratory • Radiology • Practice Management (billing and scheduling) • Referrals • Assign a “go-live” date • Train staff • Celebrate success and address problems 	<ul style="list-style-type: none"> <input type="checkbox"/> Implementation plan completed <input type="checkbox"/> Contracts completed and signed <input type="checkbox"/> Data manager assigned <input type="checkbox"/> Data conversion and testing completed <input type="checkbox"/> Interfaces tested and working properly <input type="checkbox"/> “Go-live” completed and celebrated <p><i>Vendor will be the primary driver of this phase; therefore vendor should be thoroughly engaged in all aspects of the implementation.</i></p> <p>Initials: _____ Date Phase Completed: _____</p>	
<p style="text-align: center;">Evaluation</p>	<ul style="list-style-type: none"> • Conduct post go-live reviews of implementation • Conduct additional staff training as needed • Evaluate EHR system goals met to date • Verify vendor has provided technical infrastructure to capture clinical measures for future data submission 	<ul style="list-style-type: none"> <input type="checkbox"/> Post go-live reviews for EHR goals, implementation and additional staff training completed <input type="checkbox"/> Schedule additional staff training <input type="checkbox"/> Data capture verification completed with vendor <input type="checkbox"/> Data submission to CMS <input type="checkbox"/> Assess full use of EHR system and address lags <p>Initials: _____ Date Phase Completed: _____</p>	
<p style="text-align: center;">Improvement</p>	<ul style="list-style-type: none"> • Commit to continuous review of clinical and administrative processes • Identify and target additional care management and process improvement opportunities • Use EHR to optimize practice of evidence-based medicine • Continue submission of data to CMS 	<ul style="list-style-type: none"> <input type="checkbox"/> Re-analyze clinical and administrative processes <input type="checkbox"/> Review performance reports <input type="checkbox"/> Identify quality improvement opportunities <input type="checkbox"/> Re-design work processes to use EHR clinical decision support tools with each patient encounter <p>Initials: _____ Date Phase Completed: _____</p>	S