PBSI–EHR *Off the Charts!* Implementation Process

Implementing EHR into your practice doesn't just happen. Beginning with a structured implementation process is very important to achieving final success. Outlined below is PBSI's recommended EHR implementation process.

Drummond 2011-2012 certified ONC-ATCB COMPLETE EHR AMBULATORY

Establish a Project Management Team

Establish a single PBSI EHR project manager who will be responsible for all aspects of implementation.
Establish a single client EHR project manager who will be responsible for all aspects of implementation.
Identify all other members of client project team, including lead physician & lead clinical staff member.

Evaluate & Document Pre-EHR Clinical Workflow

On-site survey by PBSI EHR project manager:

Complete detailed questionnaire outlining practice existing clinical procedures and desired goals
Gather copies of existing practice clinical documents and forms, including:

–All patient forms (registration, history, health record release, etc).
–Sample chart to show information stored in a typical chart by the practice.
–Copies of various chart notes.
–Pharmacy list - pharmacies where practice prescriptions are commonly faxed or filled.
–Facility list - facilities where orders are commonly placed.
–Outbound Referring Provider list.
–List of all practice users with their function(s) and security levels.
–Copies of all patient education materials, electronic format if possible (i.e.: pdf, tif, Word, other).
–Library of pictures used for drawing during exams.
–List of common orders for outside test or procedures.
–Practice Encounter/Superbill form with commonly used CPT & ICD codes.

Review with the practice and confirm, placement of PC's, scanners, wireless devices, and printers.
Review exam templates (Word templates, paper forms, etc.) for each type of exam used by the practice.
Locate and identify exam rooms and all other patient areas, to create a list of triage locations.

Project Plan

Together during implementation planning, we'll agree on:

–Goals that identify practice objectives to be achieved through EHR.
–List of encounter templates PBSI will create for the practice.
–Proposed action plan that identifies action steps and dates between today and go-live date.
–Workflow plan that identifies which encounter parts will be entered by front desk, MA's, physicians
–Visio® visual diagram showing placement of all PC's, wireless access points, scanners & printers.

Initial File Building and Template Setup

Initial setup files and encounter templates will be entered and/or customized by PBSI. Client will learn how to maintain these files, but initial practice-specific setup will be completed by PBSI, including:

–HPI (History of Present Illness) Templates - for pre-agreed list of different case types
–Quick Visit Templates - establishing for common case types: default template for HPI, Exam, ROS, CPT's, ICD's, meds, assessments, plans, comments, & patient ed materials
–Exam Template - from practice-supplied currently-used exam template.
–Review of Systems Template - from current ROS provided by client.

–Medical, Social and Family History Templates (including customizing based on client input).
–Immunization and Health Maintenance Templates as provided by client.
–Address Book Entries (includes common facilities, pharmacies, in & outbound referral sources).
–Order Templates - Test/Procedures as provided by the client.
–Upload codes:

- AMA ICD9 list
- AMA CPT list
- Cerner-Multum drug database w/ interactions
- PBSI-DOC ICD9 codes
- PBSI-DOC CPT codes
- PBSI-DOC Referring Provider File.

Set up:
–Electronic Superbill with groups including CPT and ICD9 codes.
–Practice Locations, Printers and Exam Rooms.
–Providers and other employees, including passwords, security permissions & “My” Buttons for each.
–Medical Record Groups and Types.
–MS Word® Templates for practice letters.
–Client system preferences.
–Secure remote connectivity, including VPN portals for access from physician homes, other locations.

Hardware Installation

PBSI installs server and other hardware in client office(s).
–Sets security for wireless access points; tests for bandwidth and wireless “dead” spots.
–Provides on-site training to cover basic use of Tablet PC functions with staff and providers.

Client Test and Template Approval

Client reviews & tests encounter templates, exam templates, etc. as entered by PBSI, to test system work flow.

EHR Training

Divide client staff into groups according to areas of responsibility:
Typical groups: Front Desk, Administration, Medical Assistant/Nurse, Providers, Billing Staff.
Train EHR modules in a group setting as they pertain to the staff’s area of responsibility.

- Logon and Passwords
- Check-In and Start of Day
- Pull A Chart, View, Print, Scan
- Work with “My” Assignments
- Encounter Entry Flow
- Superbill Review & Completion
- My To Do List
- Prescription Management
- Order Management
- Inbound/Outbound Fax Management
- Dictation Management
- Letter Management
- Batch Proof and Transfer of Charges to PBSI–DOC
- Record Locking Driver (Document review & e-sign off)

Staff begins EHR training. Initial on-site staff training begins 1–2 weeks prior to “go-live” date.

“Go-Live”

PBSI trainer is on-site for initial live use. As each provider “goes live”, PBSI trainer is on-site for their first EHR patient encounter. Initial on-site training for “go-live” is usually done on two consecutive days.

Follow-up On-site Training

PBSI trainer on-site as needed to assist with new/additional users.

Celebrate Success!
When all goals are met, all providers have “gone live”, we’ll cheer to your success!

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“Helping clients achieve success – since 1983”