HST Pathways™

A Comprehensive Checklist to Help You Successfully Select and Implement an EHR

Foreword

The fast-paced world of healthcare is ever-changing. Caregivers are balancing delivering health services at an affordable cost while maintaining excellence in patient care and experience. Doing so has become a balancing act like never before.

Selecting an Electronic Health Record (EHR) built specifically for ASCs is key to driving ease of use, compliance, and acceptance by your physicians, nurses, and anesthesiologists. You can be confident that you will undoubtedly increase operational efficiency and profitability after implementing an EHR that fits your needs.

This eBook aims to provide guidance that will help you successfully navigate and select the best EHR for your facility, staff, and patients.

Thank you for reading.

- Robert C. Marinich

Table of Contents

HST Pathways

Understand Different EHRs Available Today

Every EHR on the market is built differently. It's impossible to build one with a one-size-fits-all mentality with such complex use cases, specialties, and reporting needs. It's common that surgery centers will come across an EHR designed for hospitals or physician's office – but it's like trying to fit a square peg in a round hole. It simply won't work efficiently. ASCs need an EHR that was designed specifically for them.

Here are some examples:

- **Physician:** Allscripts, eCW, Nextgen, etc.
- **Hospital:** EPIC, Cerner
- **ASC Specific:** HST eChart, SIS

When evaluating vendors, here is a checklist of questions to ask:

Is it built specifically for the ASC market?
Is it repurposed from a different industry?
Does it contain all the necessary industry-specific and required reports?
How often is the software updated?
What is the percentage of development money spent on the application annually as a percent of budget?
Does the software company have a client product council?
Can I speak with current customers?

Remember the Goldilocks Effect – you need to find an EHR that fits just right.

Identify Your Internal Stakeholders

Without internal buy-in from all necessary stakeholders, it will be challenging to make the evaluation, implementation, and adoption processes successful. It is important to understand everyone involved – from the person who has final approval to the person who will be living in the software day-in and day-out. Having internal evangelists and influencers is critical to successful implementation and adoption. This will be your committee.

Let's build your committee.

Who be in charge of gathering and presenting research on different vendors?
Who will be part of evaluating that research? Potentially members of your staff that have previously used an EHR or that keep up with industry trends.
Who will be the end-users? (Nurses, physicians, administrators, etc.)
Who will be making the ultimate decision?

Here's how you can make your committee a success.

Establish a realistic and achievable timeline.
Establish recurring meetings.
Be open to new ideas.
Foster creativity.
Embrace change to facilitate growth.
Develop a mission for your team.
Be transparent and forthcoming about goals.

HST Pathways

Do Your Internal Due Diligence & Establish a Baseline

To make this a success, you must take the time to do a thorough analysis of how your ASC is operating today. By doing so, you'll be able to identify holes in your processes and where there is room for improvement, which will only further build your case for moving forward with an EHR. Without this foundation, it will be challenging to get your stakeholders on board and answer any questions that may come up. It will also be necessary as you build the case for executive or board level approva.

What do we know?
- Look at all areas of your internal processes – from scheduling to payment
- What do the internal stakeholders like and dislike? What do they like vs. what can be improved?
- What do the external stakeholders like and dislike? Speak with your Physician's Offices, Anesthesia Providers, Vendors, etc.
- Gather all your charts, begin an internal evaluation of the chart(s) and determine what changes are desired.
- Look for areas of friction, when and where are you handling paper

What do we NOT know?
- How does information currently flow into and out of the ASC?
- What can we change?
- What do we want to change?
- What do we need to change?

Understanding the ASC need:
- Perform a gap analysis
- Identify your programmatic processes
- Identify interface options and needs

What technology is needed?
- Specifications:
  ◦ Understand the specifications: what is the difference between the minimum and recommended? (Hint: always go with the recommended!)
  ◦ Make sure you partner with your IT group
- Hardware:
  ◦ What currently exists? (laptops, workstations, tablets, etc.)
  ◦ What needs to be purchased?
  ◦ How many items need to be bought, and from where?
  ◦ Printers/Fax – what is compatible?
  ◦ Vital Monitors – what is compatible?
- Software:
  ◦ What is included?
  ◦ What is not included?
  ◦ How does this work with third-party software?
  ◦ Is third-party software necessary?
  ◦ Does it connect to towers, etc.?
- Infrastructure:
  ◦ What do I need to build out?
  ◦ Evaluate wiring and wireless
  ◦ Look into your internet provider bandwidth and backup options.

HST Pathways

Connect with Your Peers

There's nothing more powerful than a referral from someone you trust. We recommend talking to as many people as possible to gather first-hand testimonials based on experience. You can connect with other local surgery centers, your state ASC association, check ASCA Digest, and find peers on LinkedIn to get the conversation started.

- Which EHR are you using?
- Which EHRs did you consider?
- How was the implementation process?
- What are the pros and cons?
- What surprises did you encounter?
- Did you miss anything during the selection process?
- Which questions do you wish you asked?
- Were there issues that came up? If so, what was the path for resolution?
- Would you choose the same EHR if you had to do it all again?

Select a Vendor

By now, you have put a great deal of time and energy into preparing for the selection process – so let's do it!

Identify the vendors you want to receive more information from
Consider creating a Request for Proposal (RFP)
Put a timeline in place for selection
Double-check on your committee – who will participate in the selection process?
Determine how many demonstrations you need. Will they be in-person or online?
Determine features that are critical vs. important vs. nice to have (no software is 100%)

Questions to ask during the demonstrations:

Am I seeing this application in real-time, or is it a video?
What features are working today vs. what is coming soon?
How often do you perform updates?
Who are your partners?
Who do you integrate with?
Can you tell me about your security measures?
Can I see your implementation process?
Can I speak with those currently going through the implementation process?
Do you offer custom reporting and state reporting? Can I add new reports?
How customizable is the application?
What does customer support look like?
What is your average response time, and do you offer a ticketing system?
Will I have a dedicated point of contact throughout implementation and post-go-live?
What continuing education do you offer post-implementation?
Walk me through the pricing – what exactly is included? Will there be any surprises?

Don't forget to refer to the section "Understand Different EHRs Available Today" for even more question ideas!

HST Pathways

Start the Implementation Process

The implementation process should be well defined with no surprises. Your EHR vendor should provide you with transparent, realistic dates and milestones that you can expect to hit.

Here are the following things you should expect for a successful implementation.

> A kick-off call with all stakeholders on both sides
> An implementation project plan discussed and agreed upon during kick-off
> A dedicated registered nurse
> A standing, recurring meeting, either weekly or bi-weekly
> Encouraged involvement from the various stakeholders and vendors
> Clear expectations of the workload for each party (what they do vs. what you do)
> A detailed discussion around data conversion and additional costs regarding delays (on both parties)

Kick-off Go-Live

This is where the "rubber meets the road." It should be planned and carefully executed, never a guess! This is the culmination of the work and investment from your team. There should be a test of the process followed by a soft go-live and the actual go-live. Contingency plans should be in place; however, the team should be well trained and excited to move forward.

Here are some items to confirm.

> Is there a soft go-live to test the environment?
> What are the resources available during go-live?
> Is there a contingency plan if there are issues during go-live?
> Are there means to stagger go-lives if we are launching multiple products?
> How long does post-go-live support last?

Ongoing Education, Training, and Support

Success is never a one-time thing. Moreover, it is an everyday thing. What happens after going live is as important as the go-live itself. You want a close partnership with your software provider and a means to continue improving your team's knowledge. Equally important is a tool to provide and share feedback and suggestions. Consider this more of a partnership than a client-vendor relationship. Here's what you should be looking for.

> Continued education and training: free and paid options
> Access to additional resources, webinars, user conferences, etc.
> Client portal for feedback, enhancement requests, and performance improvement ideas

HST Pathways™

This document is a good starting point for reviewing EHR options. The check list above will foster increased communication with your team and expectedly drive increased questions. As you expand and fine tune this list based on your needs, you will develop a road map for your EHR deployment and continued success.

For more information about HST eChart, our leading EHR solution, head over to **www.hstpathways.com/hst-echart**.

HST PATHWAYS

HST Pathways™