

Planning & Implementation Checklist

Please take a moment to look at the following checklist to gauge your readiness to support your Health IT acquisition and implementation project. You will not need to submit this checklist with your application; it is for your use only

Are the following project documents/items currently in place?

Response		Document/Item	Description
YES	NO		
		1. Documented, shared goals and expectations for the Health IT project	Well documented goals and expectations address how achievement toward goals will be measured (baseline measures and improvement goals) as well as key features of the system that need to be implemented to effectively support the goals (e.g., results trending requires entry of discrete data vs. scanning, effective charge capture requires coding assistance functionality) Ideally, there is a document with signatures of all key staff within the practice showing consensus for goals and expectations.
		2. A comprehensive due diligence process used in selecting the Health IT solution.	
		3. A all-inclusive project budget	Costs for all related components and services should be considered in developing a comprehensive project budget. These include costs associated with hardware, devices, software licensing, taxes, maintenance fees, training, interface development, temporary labor, data conversions, staff overtime, technical support, facility changes, etc. Reduced productivity during implementation is often a result of new Health IT implementation. This may result in reduced revenue to the practice that will add to the project costs.
		4. A funding plan	Identifying funding for the full scope of planned implementation will allow the project to move forward without delay as new funding is secured.
		5. Designated project team including:	Although most individuals within the practice will be pulled into some portions of the implementation efforts, several members of your practice will need to lead and devote significant time to the efforts in order to assure success. These roles need to be held by key resources within the practice who possess the knowledge, skills and leadership necessary to push the Health IT implementation forward. These critical roles are:
		<ul style="list-style-type: none"> ▪ Clinical Champion 	A visionary, respected leader who can take on the responsibility for establishing the “big picture” Health IT plan and for leading clinicians in template, clinical

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YES	NO		
			workflow, standardized documentation and other decisions necessary to implement the best possible Health IT solution. For an Electronic Medical Record (EMR) implementation, this individual can be expected to spend 20% - 50% of their time working on the project.
		<ul style="list-style-type: none"> ▪ Project Manager 	An enthusiastic, highly organized leader with excellent understanding of the practice who can manage the responsibility of coordinating, facilitating and serving as “task master” to assure all vendor and practice tasks are completed accurately and on time. For an EMR implementation, this individual can be expected to spend 75% - 100% of their time devoted to the project.
		6. Health IT implementation phasing strategy	<p>Strategies for introducing change to the practice need to address the following two sets of questions:</p> <ul style="list-style-type: none"> <input type="checkbox"/> How much of the available system functionality should be implemented immediately and how much over time? Can the practice absorb large blocks of change or is it better to introduce change slowly and incrementally? What increments of time are appropriate for introduction of new functionality not included in the “day one” plans? <input type="checkbox"/> Who should go first with the initial functionality? Is there one individual or area that is more ready than the others to move ahead and how will doing so impact the other areas of the practice? What is the appropriate timing for moving a second, third, etc. group/individual forward if a “big bang” (i.e., all individuals and areas at the same time) approach is not used? <p>An effective strategy will define increments and phases that align best with the resources, dollars and time commitment that can be devoted to the effort and the level of risk and change the practice is willing to take on.</p>
		7. Workflow redesign plans	<p>Workflow changes significantly with the adoption of Health IT. Workflow planning needs to clearly address who does what and the hand-off processes between departments/areas (e.g., reception to nursing, nursing to physician, physician back to nursing, nursing to lab, etc.). Thinking through the many clinical and operational tasks that make up the day-to-day activities of the practice requires careful analysis of critical information, triggers, flags, etc. that are included in paper documents and/or operational tools. In general, each workflow document should minimally touch on these points:</p> <ul style="list-style-type: none"> <input type="checkbox"/> How does the practice communicate internally about the steps of this process and how will it differ with the new Health IT system? <input type="checkbox"/> What information from this process needs to be communicated

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YES	NO		
			<p>externally? How is this achieved now and how will in change with the new Health IT system?</p> <ul style="list-style-type: none"> <input type="checkbox"/> For EMR, who touches the chart and why (e.g., updates, referencing only, copying and forwarding, etc.)? <input type="checkbox"/> How do individuals know the process is complete or needs further follow up? <input type="checkbox"/> Who tracks this, and who follows up? <input type="checkbox"/> How will this all change with the new Health IT system?
		8. Interface/integration plan	Effective interface/integration plans spell out the specific data and formats that will be exchanged between specific systems along with the acknowledged responsibilities of parties on both sides of the data transaction (e.g., the EMR vendor and the Lab vendor for order/results interfaces, the EMR vendor and the Pharmacy for prescription interfaces, etc.) for designing, developing and testing the interfaces.
		9. Established, comprehensive project plan	A comprehensive project plan serves as the critical map for implementation and a constant reference point for evaluating progress and detecting potential problems. A project plan details the tasks, sequencing, responsible parties, dependencies and timeframes for all vendor and practice responsibilities necessary to effectively implement the system.
		10. Patient communication plan	<p>Fully realizing the perspective of the patients as the practice moves toward Health IT adoption helps in preparing and delivering effective communication to address their concerns and enlist their patience and support for the clinical disruptions ahead. An effective plan will include steps to:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Tell them what you are doing and why <input type="checkbox"/> Provide consistent answers to questions and concerns <input type="checkbox"/> Keep them informed on progress <input type="checkbox"/> Communicate enthusiasm and confidence <input type="checkbox"/> Include them in success celebrations <input type="checkbox"/> Show them the value