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Views on Technology

EHR success starts with a "reality check"

by Carl Turso, MAT



Electronic health records (EHR) are transforming the way behavioral health organizations conduct their business. It's true that virtually any clinical or business process done using paper can be replicated electronically. And because, with an EHR, information can be accessed, analyzed and manipulated in ways more meaningful than previously possible, workers and managers can make smarter decisions and accomplish most day-to-day tasks much more efficiently.

However, while there are many advantages that come with the switch from paper to electronic systems, a successful EHR implementation requires serious planning, careful analysis and thoughtful attention to how staff will interact with the system. For these reasons, the early stage of an implementation project is a good time for a *reality check* with the organization's key stakeholders. A reality check requires an organization to acknowledge the challenges and issues it will encounter during and after the implementation of the EHR, which will in turn allow it to create a set of realistic expectations for the execution and outcome of the project.

There are basically two types of issues an organization will encounter with the implementation of an EHR: *real issues* and *psychological issues*. Real issues refer to functional items such as deciding which tasks the system will perform and how much time and effort the project will require. Psychological issues usually involve the resistance to change that staff members may experience as they transition into using the new system in their daily work routines. A reality check provides an opportunity to understand and prepare for these issues before they arise. Let's take a brief look at both of these issues, as well as a strategy for dealing with them.

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How difficult is it to keep up with changes in patient invoice coding (e.g., ICD and CPT, etc.) so that you are receiving the correct payment from clients and reimbursement from the government (e.g., Medicare/Medicaid)?

- Very difficult, they are changing constantly
- Very confusing, especially for new staff
- Very confusing, especially if an insurance carrier deviates from the coding principles
- Not very difficult, we have automated our billing system
- Not very difficult, we have experienced staff
- None of the above

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Real Issues

How much time and effort will be necessary for your EHR to become functional? The implementation of an EHR is fraught with hundreds of decisions over the course of many months. During the process known as *discovery*, the development team explores the organization's processes and data uses to determine its business requirements. Agency executives and implementation project managers must absorb a massive amount of knowledge to make informed decisions regarding the setup and use of their EHR. One of an agency's most important decisions is selecting a compatible vendor. Some agencies conduct more than a year of research, talking with vendors to find one with whom they "click" and feel can best identify and satisfy their business needs. The agency must also create an internal implementation team that will collaborate with the vendor in executing the project. Software, and potentially hardware, will be installed, configured and tested. Finally, users will be trained to do their old jobs using the new EHR.

Psychological Issues

An EHR changes how people work and usually requires some members of the organization to take on new roles and responsibilities. Many will find the changes and new responsibilities exciting, while others may struggle and resist them. It is common for at least some staff members to experience the stress and anxiety that often comes with changing one's work routine, especially those who are less technologically savvy.

Reality Check

While the start of the implementation process is an exciting time, it is important not to be too optimistic about the challenges that lie ahead. The larger the gap between expectations and reality, the more stress and frustration will arise during and after the implementation of the EHR. A reality check serves the important purpose of helping to minimize the gap by confronting the real and psychological issues in advance.

Many organizations consider time to be their most valuable resource. For this reason, a reality check begins by acknowledging that the implementation of an EHR is going to take time. Underestimating the amount of time it will take to implement the system is one of the most common sources of frustration for agencies. Most have limited familiarity with software development projects and are often surprised by the sizable investment of time required. Project steps often take longer than initially expected. Closely related to time is the amount of effort that will be required. The complexity of an agency's workflows and processes will have a direct impact on the amount of input that will be needed from various stakeholders. Be prepared for lots of meetings, conference calls, and emails.

The entire organization will be affected after the EHR is finally operational. While taking into account the many new improvements and benefits that will be possible, coping with the changes may be difficult for some members of the organization. Project managers should anticipate and prepare for the inevitable resistance, which will vary from person to person. Although the majority of the staff will usually be open to change, even enthusiastic employees will need a fair amount of guidance through the transition period. Transitioning to the new system will require a significant amount of learning and staff members will learn at different rates. Depending on the size of the organization, training users and providing ongoing support may add new duties to staff members' existing workloads, furthering stress and resistance.

Handling the Challenges

How can an organization overcome the issues identified during the reality check? One strategy that has helped many agencies successfully navigate the challenges of the implementation process is creating an effective internal EHR governance and support structure. Tim Carpenter, senior business analyst for Lutheran Social Service of Minnesota, recommends creating a "distributed model" of EHR governance and support. This model *distributes* EHR system governance and support responsibilities to key stakeholders and end users through groups or teams, such as an EHR Steering Committee or an Operations Team. The Steering Committee makes decisions about how the EHR will be implemented and managed throughout the organization and usually includes key senior staff such as the CFO, Program Director, and IT Director. To deal with many of the resistance and learning issues, there is the Operations Team which serves as the first level of support for users. The team consists of "super users"- highly skilled end users who embrace change and enjoy supporting, teaching, and

working collaboratively with others.

The implementation of an EHR is an exciting but challenging process that requires careful planning and execution. Real issues such as the amount of time and effort required as well as psychological issues including resistance to change are an inevitable part of the process. Having an implementation “reality check” at the start will help stakeholders acknowledge these issues and stay focused throughout the project's completion and beyond. In other words, starting out with a realistic set of expectations for your EHR project will provide a better system and experience later.

Carl Turso, MAT, is a Business Development Specialist at Defran Systems, Inc., which provides EHR software to behavioral health and human service organizations.

For more information, e-mail cturso@defran.com, call (212) 727-8342, or visit <http://www.defran.com>.

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