

One size does not fit all



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Six strategic tips that will help ensure the smooth selection and deployment of practice automation tools.

By Anna Randall and Bruce Lieberthal

When it comes to selecting, implementing and measuring the success of automation tools for small to medium-size practices, there is no “one-size-fits-all” solution. And with so many vendors and features to choose from, the decision can be challenging – if not overwhelming – for physicians and practice managers. The challenge is managing a successful implementation that ensures the long-term adoption of new automation tools.

Healthcare reform has expedited the adoption of automation systems, including practice management (PM) and electronic medical record (EMR) software and e-prescribing (eRx) tools. There’s little doubt that practices are also genuinely making the change to automate previously manual workflows because of the many benefits they stand to gain, from better clinical outcomes to improved operational efficiencies to greater profitability. Despite these enticements, the fact is that change is hard.

Here are six strategic tips that will help ensure the smooth selection and deployment of practice automation tools:

1. Get staff buy-in

Most professionals, whether they’re physicians or administrators, spend years becoming masterful at their jobs. None want to feel surprised by sudden and unanticipated changes at work – and certainly not by new workflow processes that may impede efficiency. Even before starting the product/vendor evaluation, it’s critical to gain staff buy-in. Practice managers should hold staff meetings early and often to discuss the need for the automated solution and let all know that their input will help make the right choice for the practice. It’s also important for staff to understand that the vendor’s technology will be aligned with staff preferences and workflows, not the other way around. Explaining how the technology can simplify tasks and lead to greater efficiencies will go a long way toward staff accepting that there will be a learning curve, and it is important to be patient with one another as the team gets on board.

2. Identify implementation champions and super users

In order to hold to the target deadline and enable effec-

tive department-wide communication, practices should identify administrative and/or clinical “champions” who will lead the selection and imple-

mentation projects, advocate for change and keep their departments apprised of updates, timelines and priorities. Similarly, when working with a vendor, it is helpful to identify a main resource person to help guide the practice through the implementation process. Additionally, some practices may be able to identify and enlist “super users” who will be in place to help increase the adoption rates and decrease errors of other users after deployment. Super users are typically tech savvy, excited about the new tools and positive in their interactions with other staff members, who will serve as good trainers and coaches for other staff members that might be less technical and/or more resistant to change.

3. Plan the implementation project

Start planning your implementation project by conducting a workflow analysis to provide stakeholders with an understanding of how patients are currently managed through the administrative or clinical experience, from scheduling an appointment to receiving discharge instructions, as well as documenting every resource used throughout the patient and staff experience. The workflow analysis should be created in two parts: current workflows and new workflows. Use the new workflow documentation to identify changes to the current processes, as well as new resources. Share the new workflow with everyone that has an interest in making practice improvements and all staff that will interact with the new tools.

When a workflow analysis is completed, the practice should expect to see:

- Workflow maps of current office processes and resources;
- A description of current inefficiencies and opportunities for improvements; and
- A high-level map of future workflow redesigns, including new office processes and resources.

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Understanding workflow can have a big influence, for example, especially on how an EMR is configured and on its case of use. Standard EMR templates may work well for some practices, but for multi-specialty practices, such as community health centers, podiatrists or OB/GYNs, specialized content and customizable features make it easy for specialists to deploy and use the EMR – and with significantly less disruption to their office workflow or preferred documentation habits. The implementation of an EMR should focus on tailoring the system to these preferences and workflows.

In the case of implementing an EMR automation solution, the good news for small and solo practices today is that the range of EMRs available has expanded so greatly that medical groups can reasonably expect to find an EMR that suits their needs – at an affordable price.

4. Choose integrated automation tools

One of the key aspects of successful office improvements is choosing integrated automation tools, including EMR and PM software solutions that share data flawlessly and match the size of the practice, as well as address the specific needs within the specialty. Integrated EMR and PM systems, either already integrated from the same vendor or programmed to share data, can improve office efficiencies and deliver significant financial and clinical benefits. Additionally, there are many products and services that integrate with EMR and PM systems to help clean up office clutter, reduce time spent on manual filing and organizing, and even automate appointment reminders to reduce or eliminate missed appointments, as well as mechanize collection services to help improve office cash flow. These are a few of the simple and quick ways to increase revenue. An integrated platform can also enable automated insurance eligibility and prescription coverage. Automation not only improves the accuracy of medical documentation, but it can also help providers secure EHR and eRx incentives, as well as meet 5010 and ICD-10 regulatory requirements.

A practice can further enhance its capabilities and streamline processes with add-on products and services, such as voice recognition, credit card and payment plan solutions, financial dashboards, insurance card scanning, electronic signature technology and identity verification tools. An integrated platform with laboratory and device connectivity, such as vital-sign monitoring systems or the



ability to send lab requests and receive results, enables providers to improve efficiency and reduce errors, resulting in improved patient care.

5. Establish realistic expectations

No matter how welcomed and how needed the change, it's still stressful. There are going to be setbacks. One way to settle nerves and contain the disruption is to set realistic expectations – of staff, the process and the ability of the new technology. Automation doesn't happen overnight, and neither does mastery over its many new tools and features. Begin by dispelling the myth that the technology

will immediately make offices work better and faster. It will take time to streamline processes, improve outcomes and increase patient satisfaction. Keep in mind that tracking and measurement are important to understanding the value of automation. Also, some changes are harder and more time consuming to quantify, such as staff efficiency, patient satisfaction and safety. Finally, establishing an accurate project timeline and budget will help manage expectations and keep the project on track.

6. Invest in training

While there's a cost for training, it's critical to ensuring the long-term adoption and efficient use of automation tools to achieve desired results. Consider purchasing a predefined number of training hours depending on staff experience, exposure to other technology systems and learning style. Training, like the software itself, should be flexible and based on the needs of the practice. Opt for a vendor that offers a well-defined and ordered training program, in which each successive module builds upon the last. In this way staff can see how information and processes are connected.

Lastly, a caution: Avoid the common mistake many practices make of buying training but not insisting on staff attendance. Providers may be more likely to duck training due to hectic schedules. It's critical they understand the importance of learning how to use these tools and how they will impact the efficiency of the practice. Without training, this can be severely hindered. The losses in productivity will be quickly recouped with a confident staff that is skilled at operating the new system(s).

Successful implementations occur when practices follow these five strategic tips with the understanding that the vendor relationship is very much a partnership: It doesn't end after deployment. A vendor's knowledge is invaluable to supporting and guiding the practice through changes to its automated systems and to federal health-care regulations.

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