



## Go-Live Planning Checklist

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The purpose of this tool is to aid your practice in planning the EHR system Go-Live and to identify any issues that need to be addressed beforehand. This checklist will help eliminate some of the “gotcha’s” that often occur on the first day of system implementation.

Your EHR project team should review this list and add any items that might be specific to your practice.

### **Systems Connectivity:**

- All PCs have been checked to ensure that the EHR application can be accessed.
- If you are using an ASP model with redundant lines, they have been checked.
- EHR system faxes have been tested and are working.
- Wireless PC connections have been checked and areas without connection or “dead spots” have been identified and communicated to wireless users.
- EHR system interfaces have been tested and are working. This includes E-prescribing, lab orders and results.
- All computers can connect to a printer and print from the EHR system.

### **Backups and Downtime:**

- System backups have been tested and validated. Off-site storage of backups has been arranged.
- Downtime procedures have been established and are ready to go, if necessary.
- Paper copies of all patient forms, templates, etc. have been made available in the event of a system failure.

### **Staff**

- Staff has been trained on any new EHR policies and procedures and has signed off indicating that they understand the new policies and procedures.
- Staff has completed EHR application training (education session sign-in logs have been verified).
- All morning staff has been instructed to arrive to work 30 minutes early to prepare for the first patients.
- Staff has performed a “system walk through” of a patient visit from beginning to end, allowing questions to be answered and minor glitches to be corrected.



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### The Practice

- Appointment times/schedules have been modified to allow for the EHR's learning curve.
- Signs have been placed around the practice to let patients know that an EHR is being implemented and requesting patience with delays.
- The phone tree message has been updated with a message stating that the practice is implementing a new EHR and requesting patience with delays.
- Go-Live day "break area" has been established with snacks and drinks for the staff.
- Expectations have been set that the Go-Live day might not be perfect, but we will get through it if everyone does the best job they can.
- Review current new patient forms – modify if necessary.
- Review consent forms, might need new language added.

### Support:

- Support escalation procedures have been completed and are in place. The escalation plan has been communicated to all staff and to the vendor (these are procedures that define what actions will be taken in the event there is a problem, who will manage the problem internally, and if necessary, who will report the problem to the vendor).
- The Practice Champions have been trained and are aware of their roles and functions for Go-Live.
- Morning, noon and evening support team "huddles" have been established to check in and review the issues.
- A point person has been identified and will be available to make critical system changes on the fly.
- Your EHR vendor has been notified of your Go-Live and is on site or on standby for support.

### Application

- All users have successfully signed in to the Live EHR system with their own user name and password. Everyone can log on and has the correct privileges.
- The EHR build is complete and has been signed-off on.
- The EHR has been tested and has been signed-off on.
- Paper reports and forms that will be generated out of the EHR have been tested.