✳ MGMA

Electronic Medical Record (EMR) checklist

Thinking about implementing EMR in your practice? Dublin Primary Care in Colorado Springs, Colo., successfully introduced the technology to its staff and patients. Debbie Milburn, CMPE, operations manager and an MGMA member, assisted in establishing this tool. She offers a checklist to use as you take the plunge in your practice.

Decision making

- ❑ Consider your practice's long-range planning.
  - o Make your practice management, billing and EMR decisions at the same time
  - o Is this a proper goal, based on your financial status?
  - o Understand the costs of paper medical records, such as printing, paper and other hidden expenses
  - o Perform a return-on-investment analysis

- ❑ Decide as a group to implement EMR
  - o Take a look at the benefits:
    - ▪ Reduced staffing
    - ▪ Easier to comply with regulations
    - ▪ Transfer of information (site to site) easier and more efficient
  - o Take a look at the downsides:
    - ▪ Implementation of a computer system can be difficult
    - ▪ Practice has other projects and not enough time and resources to implement EMR
    - ▪ Cash flow is not strong enough to withstand implementation

- ❑ Get all your physicians and administrators on board
  - o Hold a meeting to discuss and make everyone a part of the decision
  - o Listen to issues, comments and suggestions
  - o Agree to implement with positive attitude from all staff

- ❑ Look at the EMR products available (via the Internet, exhibit halls at conferences, etc.)
  - o Review the ability of products to interface with your existing practice management programs

- Locate a local practice using EMR and ask questions
  - Talk to physicians
  - Talk to administrators
  - Ask how they use it, like it
  - What improvements do both groups recognize?
  - Did documentation improve as a result of the implementation?

- Locate a vendor that meets your price and service needs
  - Does it provide on-site training?
  - How long is the transition between training and support?
  - What kind of warranty is offered?

- Ask for references and ask the clients to:
  - Identify the positives and negatives experienced during implementation
  - Talk about the level of service provided by the vendor
  - Discuss maintenance issues (what has happened since the implementation)
  - Review their experience meshing the EMR system with other vendors' products

Implementation

- Create a plan to include:
  - Timeframe (it's critical to implement as quickly as possible)
  - Tasks and responsibilities
  - Mandatory training for all staff
  - Commitment of key physicians and staff

- Implement EMR with a vendor representative on site

- Schedule and complete training

- Ensure vendor support available

- Security for both hardware and software

Maintenance

- Make sure you incorporate service agreements in your contract
- Know the limitations of the service contract (time available, how measured, etc.)