



Indian Health Care Provider Best Practices in Planning for a New EHR



OVERVIEW

The AIHC provides advocacy and technical assistance to Indian health care providers (IHCPs). PLEASE NOTE: this “Example Best Practices in Planning for a New EHR” document is intended for information purposes only. The purpose of the “Example Best Practices in Planning for a New EHR” is simply to outline a few best practices. The document does not include every step that should be part of planning for, selecting, and implementing a new electronic health record (EHR), nor does it propose that all of the practices included herein will be appropriate for every IHCP. The listed practices may or may not apply to any given IHCP. Each IHCP must thoroughly assess its needs and map out its own unique plan.



EXAMPLE Steps in Planning for a New Electronic Health Record

Create a HIT Team

Create a core team to guide your healthcare IT efforts. Do not limit it to one or two individuals. It is important to include the right mix of leadership with technical, clinical, administrative, and project management staff on your team (e.g., elected official, health director, physician, nurse, nurse practitioner, behavioral health aide, dentist, CHR, scheduler, PRC, referral coordinator, biller, elders program, etc.). A change in EHR will change how everyone does their job. It is essential to include staff in your planning efforts from the very start. Err on the side of inclusion. Keep all staff apprised of your progress. The more you include your staff in this transformative process, the more successful you will be.

Implementation Support

Determine whether you would like to hire a Health IT consultant to assist with planning, vendor selection and/or implementation. There are professionals who specialize in assisting organizations with this process. In selecting the best matched resource for your needs, be sure they have no conflicts of interest. Ask other IHCPs for references.

Check Online Resources

There are many online resources to assist organizations considering EHR solutions. Become familiar with them and see which ones can support your efforts. The Office of the National Coordinator for Health Information Technology (ONC) provides several tools at <https://www.healthit.gov/>. The following are examples of tools ONC offers online.

- Health IT Playbook: <https://www.healthit.gov/playbook/>
- Vendor Evaluation Matrix Tool: <https://www.healthit.gov/resource/vendor-evaluation-matrix-tool>
- Vendor Meaningful Use Compare Tool: <https://www.healthit.gov/resource/vendor-meaningful-use-compare-tool>
- Vendor Pricing Template: <https://www.healthit.gov/resource/vendor-pricing-template>
- Important Items to Include in a Vendor Contract: <https://www.healthit.gov/faq/what-are-important-items-include-vendor-contract>



Define Your Goals

Define your goals for the future. Be sure to define goals in all key areas, for example:

- Integration of primary care and behavioral health
- Third party revenues
- Care coordination with external providers
- Chronic disease management
- Preventive Care
- Staff productivity
- Patient experience
- Others
- RESOURCE: <https://www.healthit.gov/faq/what-types-goals-should-i-set-during-readiness-assessment-process>

Define Your Model of Care

Determine how you want your various health services to work together to best provide whole person care. Design a model that is right for your healthcare system and your community. AIHC has created a Tribal Behavioral Health Integration Toolbox to assist IHCPs in designing your unique integrated models of care. RESOURCE: <https://aihc-wa.com/aihc-tribal-behavioral-health-integration-toolbox/>

Define Your Data Access Policies and Privileges

Define your own policies for staff access to data in the EHR. Consider issues related to staff related to patients. Develop your policies to meet your healthcare system's and your community's needs.

Define Your Optimal Workflows

Look at your existing workflows for patient care and determine what you want them to be in the future. What will make your staff more efficient? How can you prevent patient care needs from being missed? How can you assure you send reminders for all follow-up care? How can you make your patients' visit experience more satisfactory? How can you assure you are billing for all appropriate charges? Design your desired future workflows as a team. Include providers (medical, dental, behavioral health), clinical staff, schedulers, billers, referral coordinators, PRC. AIHC has developed example "Existing" and "Desired Future" workflows for IHCPs to use. RESOURCE: <https://aihc-wa.com/wp-content/uploads/2019/09/Example-Current-Immunization-and-Preventive-Screening-Workflow.pdf>; <https://aihc-wa.com/wp-content/uploads/2019/09/Example-Desired-Future-Immunization-and-Preventing-Screening-Workflow.pdf>; <https://aihc-wa.com/wp-content/uploads/2019/09/Example-Desired-Future-Outside-Referral-Process.pdf>



Determine If/What Data Migration Makes Sense

In changing from one EHR to another, sometimes it is possible to copy data from your legacy system and import it to your new EHR. There is always a cost involved. It is important to determine how accurate those data are before investing in moving them to your new system. Also, if you have paper charts, it is often possible to scan some of those records into your new EHR. Each clinic needs to decide what is right for them. Different approaches range from: scanning nothing and keeping the paper charts available to access when needed; to selecting a list of key information points to scan; to scanning the entire paper chart. Scanning can also be done gradually. For example, clinics can schedule each patient's first appointment after go-live to include time for the provider to review the paper chart and decide what information should be scanned.

Create a Vendor Requirements Document

Based on your unique needs, create a document that outlines what criteria a vendor must meet. Be specific. This is a document you can ask a vendor to complete and then attach to your purchase contract. It is a tool to assure you are aware, and have in writing, what the vendor can and cannot offer. It is also a tool to hold vendors accountable, when it is attached to a purchase contract. Create a list of reports you need to produce from the EHR. Identify what EHRs your main external care providers use (specialty providers, hospitals) and require EHRs that will maximize the ability to coordinate care with those providers and integrate external provider chart notes. Identify what systems your main lab, imaging and pharmacy partners use and require EHRs which will maximize interoperability. AIHC has created an example vendor requirements document for Indian healthcare providers. RESOURCE: <https://aihc-wa.com/wp-content/uploads/2019/09/Example-EHR-Vendor-Requirements-Documents-Overview-09-17-19.pdf> ; <https://aihc-wa.com/wp-content/uploads/2019/09/Example-EHR-Vendor-Requirements-09-17-19.pdf> .

Identify Potential Vendors to Consider

Start with ONC's Certified HIT Product List: <https://chpl.healthit.gov/#/search> . Find out what other IHCPs are using and how satisfied they are. Find out how your preselected vendors rate in comparison to others and in specific areas of performance <https://klasresearch.com/home> . KLAS provides the most comprehensive ratings and comparison information on EHRs.

Request for Information from Potential Vendors

Develop a Request for Information to solicit information from vendors about their products and services. Ask for information about the vendor's organizational profile, implementation and training model, ongoing support, health information exchange (HIE) capability and included interfaces, Meaningful Use guarantee, estimated total cost of ownership, pricing structure, and availability for



demonstrations. AIHC has created an example request for information document for Indian healthcare providers. RESOURCE: <https://aihc-wa.com/wp-content/uploads/2019/09/Example-EHR-Vendor-Request-for-Information-09-17-19.pdf> .

Invite Vendors for On-Site Demos

Include your HIT Team, key staff and leadership in the on-site demos. Before your on-site demos, develop a system of how you will rate each vendor for comparison. RESOURCE: <https://www.healthit.gov/resource/vendor-evaluation-matrix-tool>

Contact References

Contact vendor references; visit IHCPs and other practices using the system.

Contracting

Involve your organization's legal counsel. Contact IHCPs and other practices using the system and ask for any potentially useful information. Include your vendor requirements document - signed and completed by the vendor - as part of the contract. RESOURCE: <https://www.healthit.gov/faq/what-are-important-items-include-vendor-contract>