EHR Transition Planning Timeline

Transitioning to a new EHR system is no simple task. Much thought and preparation is needed to successfully implement a new system. ApolloMD provides you with a 12 month timeline and checklist to guide you through the planning stages.

Prior to go–live date

6–12 months

- Meet with hospital administration to discuss the implementation planning and schedule.
- Provide a general support plan to hospital administration.
- Engage all key players on any news or transition planning updates.
- Communicate go-live date as soon as it is known.
- Identify critical success factors, subsequent evaluation strategies and management interventions.
- Identify 'Super User' or 'Champion'

2–4 months

- Send regular communication and updates regarding go-live to all parties involved.
- Create and obtain consensus about department order sets.
- Examine workflow processes and changes that will accompany the transition.
  - Changes should be documented and practiced.
  - Ensure chart conversion process is set and in progress.
  - Examine all areas for opportunities to improve efficiency.
- Evaluate each team member's level of comfort using the EHR systems.
- Review and adjust staff schedules based on comfort evaluations. Plan for provider support accordingly.
- Engage 'Super-User' in the planning and training process, and provide more in-depth training for this user.
- Plan training schedules and determine who will conduct training seminars.
  - All users must complete basic training prior to go-live.
  - Create detailed plans with support team on how to address any problem that may arise.
  - Develop a quick reference summary sheet of all changes to the workflow processes and supply to all team members.
- Schedule progress evaluation times throughout transition and determine go-live date break area. Ex. Mid-day huddles, end-of-shift debriefing, etc.
- Work closely with hospital administration and vendor implementation team to provide feedback, ask questions and receive information in real-time.

2–3 Days

- Verify schedule for go-live date and readiness with all key parties.
- Review escalation procedures to follow in the event of a problem.
- Reinforce time must be taken for transition progress evaluations.
- Chart conversion process should be up-to-date and all applicable data should be pulled and prepped.
- All users should sign-off indicating they have received proper training and understand new policies and procedures.
- Perform a "system walkthrough" with users and use opportunity to answer questions.

Go–Live

- All staff should arrive approximately 30-minutes early to their scheduled shift.
- Staff should provide real time feedback to support teams and ask questions.
- Utilize go-live day break area and meet for transition progress evaluations.

Post Go–Live

- Meet regularly to address issues, supply feedback and share updates.
- Reward teams for adoption of new system
- Measure/assess critical success factors

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