

# The EMR/EHR Checklist: Critical Steps to Consider Before You Take the Leap and “Go Live”



*Choosing the right practice management and electronic medical/health records software is one of the most significant business decisions you'll make. However, before you take the leap from paper-based documents to an electronic system, it's important to factor in several critical steps that can make or break a successful installation.*

By First Insight Corporation, [www.first-insight.com](http://www.first-insight.com)

## Select the Right Server, Workstations and Ancillary Equipment

- ✓ Always refer to your EMR vendor's hardware and software system recommended lists; only use equipment and operating systems that your EMR vendor supports and tests.
- ✓ Use high quality hardware and exceed hardware minimum requirements (processor speed, hard drive space, RAM, etc.) to stay ahead of advancing technology—focus on your future needs, not just immediate.
- ✓ While wireless networking provides greater convenience, it often provides lower performance, reliability and security than a hard-wired network; ask your EMR vendor for advice.
- ✓ Discuss ancillary equipment requirements with your EMR vendor before you purchase equipment, such as high-output laser and label printers, barcode, insurance card and document scanners, and high-density removable backup devices.

- ✓ Hire a Microsoft® certified hardware and networking technician to assist you with all installations, networking, and upgrades—always follow-up with references.
- ✓ Ask your EMR vendor if your diagnostic equipment is compatible with your EMR system and can easily transfer readings to a patient record.

## Create a Backup and Recovery Plan

- ✓ Before you select your backup devices, consult with a certified hardware and networking technician about the backup data size you will need, and how to arrange for backup and disaster recovery.
- ✓ Backing up your data is the least expensive insurance policy you will ever have. Have at least one local backup and arrange for offsite storage of your backup media files. Without data backup, recovery is impossible! And without a recovery plan there is no guarantee that your patient data backup will make it through the recovery process.

- ✓ Computer failures can happen for a number of reasons: User error is the number one reason for data damage, loss or corruption. Hard drives are mechanical devices, just like an automobile, and they will eventually fail. Disastrous and catastrophic events, such as fire, flood, or any naturally occurring storm can be a nightmare. And failures can also happen through electrical outage, a virus, or the deliberate hacking of your data.
- ✓ Consider using a URAC HIPAA Security Business Associate online data backup, storage and recovery provider, such as [DataHealth](#). Data is highly secure, stored off-site and kept current, and is easily accessible for restore. The automated process reduces the need for additional hardware, software, and staff to perform the backup process—critical components needed for running a successful business without costly interruptions.

### **Plan for Installation, Training and Ongoing Support**

- ✓ Invest in expert onsite training for you and your staff—factor this into the cost of your EMR software. Select an EMR company that has a complete ongoing training package and customer support, including early morning and Saturday support.
- ✓ Close your office the first day you install your new software; reduce your patient load the following day.
- ✓ Book appointments lightly during your initial onsite training so doctors and staff can focus on a “hands-on” approach.
- ✓ Avoid a long delay between training sessions and the go-live date.

- ✓ Give staff time to get used to the new software; don’t learn too much too quickly while juggling a full patient schedule.
- ✓ Implement modules gradually, starting with the basics, such as scheduling and billing.
- ✓ Provide on-going training and support. Make sure staff knows where they can get answers to questions; whether through training guides, an office power user, or vendor customer support (toll-free support, online support, email, Webinars, and personalized phone trainings).
- ✓ Practice Tip: Put a label on each workstation with your software vendor’s “help desk” phone numbers, emails, or online support information.

### **Free Practice Analysis**

Ask First Insight how they can help you develop a plan of action, evaluate a return on your investment, and create a smooth-running paperless office with maximEyes practice management and EMR software.

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