

Installation and Maintenance of Health IT Systems

Unit 11 Pilot Testing and Full Scale Deployment

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Health IT Workforce Curriculum
Version 1.0 Fall 2010

1

What We'll Cover...

- Identifying a Pilot Group for Testing
- Installation, Training of Users
- Gathering and Prioritizing Feedback, Revising Project Plan as Needed
- Planning for and Deployment to End Users
 - Big Bang vs. Phased Rollout
 - Communications
 - Technical Support Resources During Rollout Phase
 - Re-evaluating Usage and Capacity of System resources Under Production Environment Conditions

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2

Identifying a Pilot Group

- Pilot Testing – A trial run of procedures, instruments and software that you plan to fully deploy in an environment.
- Trial Group –
 - Dependent upon organization's size and structure
 - Should be assessed to determine staff's technical capabilities and the ability of the practice's existing practice management technology to meet its needs
 - Larger organizations should consider a steering committee to help with the selection process
 - Ensure you have an adequate cross section of users testing the product

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Version 1.0 Fall 2010

3

Staff Education and Training

- Schedule enough time PRIOR to implementation (2 weeks or more) to ensure adequate training and to build confidence and familiarity with the system

Staff Education and Training

- Adequate training is crucial to the success of your implementation!
- There are many training strategies. Choose a combination of styles that works for your organization:
 - Train the Trainer
 - Classroom Style
 - Web
 - Hands on

Pilot Group Training and Implementation

- Treat it as a Mini-Rollout of the project
- Training is EVERYTHING!
- Pilot sites should understand that being a pilot site requires flexibility on timelines and functionality.
- Devise a contingency plan
- IT support and available resources must be ready for implementation day

Pilot Group Training and Implementation

- Involve everyone in decision making
- Consider rolling out more complex modules later on after confidence is built up and users are more familiar with the EHR.
- A formalized orientation process should be developed outlining the policies and procedures that underlie the decisions made at the organizational level

Pilot Group Training and Implementation

- Medication dosages and instructions incorporated in the EHR content should be reviewed by independent experts
- Even during pilot and beta phases of a project implementation, system stability is essential to gaining user confidence in a system

Learning from Your Pilot Test

- Develop Surveys incorporating;
 - Workflow change analysis
 - Suggestions for interface adjustments and errors
 - Data errors or failure
 - Keep a journal of experiences and processes
 - Conduct a post implementation review

Legacy Data

- There are three options for dealing with legacy data at launch:
- **No pre-loading.** In this scenario, paper charts are retained for reference. All visits after the go-live date use the EHR.
- **Pre-load limited data.** With this plan, the EHR is pre-loaded with commonly referenced data like current medications, chronic conditions, immunization history, and allergies. This approach reduces the need to pull paper charts for most visits.
- **Pre-load all information from the last year.** Ideally, your vendor will assist you in this scenario, since the data input volume is high. In this case, older paper charts are retained for reference.

Big Bang vs Phased Implementation

- **Big Bang** - An implementation strategy that cuts over all parts of a planning system at the same time in a company or division, as opposed to a phased implementation module by module.
- **Phased Implementation** - A gradual roll out of functions sequentially to a grouping of departments/ practices.

Tips on a Successful Implementation

- Train, evaluate and support your users throughout the implementation process. This is essential for optimizing user efficiency, effectiveness and system adoptability and for building user confidence.
- Test your system thoroughly before and after the final roll-out, and resolve any issues, problems or bugs as quickly as possible.

Tips on a Successful Implementation

- Remember end users determine the success of your implementation. Support them from the beginning of implementation and throughout training and into post-implementation support.
- Realize that implementing health IT is not the ultimate goal. The objective should be to maximize the efficiency, quality and effectiveness of your care delivery processes.
- Support the implementation through proactive organizational policy. Facilitating user adoption through training and continued support can help you achieve optimum results.

Closing the Gap: Post Implementation

- Continued support and development is key to ongoing success.
- Continue to solicit user feedback. Resolve issues promptly and consider improvement suggestions
- Hold a Project review Meeting
- Hold a Customer Acceptance Meeting
