

Component 8 Installation and Maintenance of Health IT Systems

Unit 11 Pilot Testing and Full-Scale Deployment

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What We'll Cover

- Pilot testing
 - Identifying pilot group
 - Installation, training users
 - Gathering and prioritizing feedback, revising project plan as needed
- Planning deployment to end users
 - “Big bang” vs. phased rollout
 - Pre-loading legacy data
 - Tips for success
 - Re-evaluating usage & capacity of system resources under production conditions

Pilot Testing

- Trial run of procedures, instruments, & software planned for deployment
- Pilot group(s) composition dependent upon organization's size & structure.
 - Consider steering committee for selection.
 - Ensure adequate cross-section of users.
 - Readiness assessment: Assess staff's technical capabilities & ability of current practice management technology to meet needs.

User Training

- Adequate training is crucial to success.
- Consider:
 - Scheduling within 2 weeks to help users retain skills
 - Scheduling both initial training and subsequent updates for complex tasks, e.g. physician documentation
 - Customizing training to meet specific needs of distinct user groups

User Training: Strategies & Styles

- Choose a combination.
 - Train the Trainer
 - Classroom-style
 - Web
 - One-on-one

Pilot Group Training and Implementation

- Treat it as a mini-rollout.
- Being a pilot site requires flexibility on timelines and functionality.
- Devise contingency plans.
- IT support resources must be committed and immediately available after go-live.

Pilot Group Training and Implementation (cont'd)

- Standardized communication process, with single liaison
- Formalize orientation process for new members, outlining policies and procedures that underlie decisions made at organizational level.
- Consider rolling out more complex modules (e.g. charge capture) later on, after user confidence & familiarity have grown.
- Involve everyone in decision-making: physicians, nurses, admin, financial, etc.

Pilot Group Training and Implementation (cont'd)

- Medication dosages and instructions in EHR should be reviewed by independent experts.
- Pilot testers should report potential mistakes.
- System stability is essential for building user confidence in system, even during pilot & beta phases.

Learning from Your Pilot Test

- Review pilot user feedback & make necessary adjustments.
- Develop surveys addressing:
 - Workflow changes
 - Interface problems, adjustments needed
 - Data errors or failure
- Keep journal of experiences & processes.
- Conduct post-implementation review.

Pre-Loading Legacy Data: Typical Options

1. None
 - All visits after go-live use EHR.
 - Paper charts frequently accessed.
2. Limited
 - Pre-load commonly-referenced data, e.g. meds, conditions, immunizations, allergies.
 - Reduces need to pull paper charts for most visits.
3. All data from last year
 - Vendor should assist due to high data volume.
 - Paper charts retained for reference.

Planning Implementation: “Big Bang” vs. Phased

- Difficult decision
- “Big Bang”: whole organization at same time
 - Pro: finish quickly; avoid separate processes for same task.
 - Con: size of project can cause chaos (especially in large organizations).
- Phased: users &/or functions introduced over time
 - Consider less-interactive functions first; e.g. scanning, result reviewing.

Implementation Tips

- Train, evaluate, & support users throughout process.
 - Essential for optimizing user efficiency, effectiveness, & system adoptability
 - Builds user confidence
- Test system thoroughly, before & after final roll-out.
 - Resolve issues, problems, bugs ASAP.

Implementation Tips (cont'd)

- Users determine success.
 - Support them from beginning, through training, and into post-implementation support.
- Ultimate goal is NOT to implement health IT
 - ... but to maximize efficiency, quality, & effectiveness of care.
- Be proactive in organizational policy.
 - Facilitate user adoption through training and continued support.

Closing the Gap: Post-Implementation

- Maintenance and update phase begins.
- Repeat baseline system performance test.
- Continue support and development.
- Solicit user feedback.
 - Resolve issues promptly, and consider suggestions for improvement.
- Hold meetings:
 - Project review (stakeholders, key players)
 - Customer acceptance (vendor)

Summary

- Pilot Testing: A process involving user testing designed to catch and correct potentially costly errors before they are magnified through full deployment.
- Training Methods
 - Train the Trainer
 - Classroom-style
 - Web
 - One-on-one

Summary

- Implementation Methods
 - Big Bang
 - Phased
- Implementation tips
 - Understand the REAL goal
 - User adoption
- Post implementation
 - Baselines
 - Maintenance and Upgrades
 - Reviews

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