

# Behavioral Health EHR Implementation Roadmap



REMARKABLE HEALTH





There's more to the success of your EHR solution investment than making the initial decision and purchase. The implementation of a new EHR system can make or break the success of agency-wide adoption and usage and make a long-term impact on the success of your organization. Selecting and implementing an **EHR solution** will put your agency on the path to improved patient outcomes and greater organizational efficiencies. With proper planning, you can anticipate any potential challenges or roadblocks and eliminate them ahead of time. The more prepared you are when approaching your implementation, the more successful the implementation and continued use beyond go-live.

This best practice guide highlights what to think about when creating your behavioral health EHR implementation roadmap. A comprehensive roadmap will streamline the process and lead to successful outcomes. Behavioral health organizations that start to think and plan their implementation **before** purchasing an EHR are much more likely to have a better experience from the start—and a more successful long-term EHR solution.

# Assessment is the foundation

Assessing your agency, particularly regarding financials, technology, and human resources, is the foundation for the rest of your EHR implementation. When you are clear about the state of your behavioral health agency, you are better able to visualize the path necessary for a successful implementation and go-live.

We recommend conducting readiness assessments of:

- **Finances.** Does your agency have access to the financial capital required to purchase new or additional hardware? Agency-wide, you will need the mindset of an investor regarding the expense of an EHR solution. Your focus should be on the return on investment you will achieve by moving to a behavioral health EHR system. This helps you identify and plan for the financial aspects of your investment.
- **Technology.** Technology needs can vary depending on your choice of EHR solutions: on-premise or hosted. As a general rule, an on-premise EHR software solution will demand more hardware and ongoing maintenance than a hosted solution. Also identify hardware needs such as printers and scanners, and consider how you want to use the platform: via tablets, laptops, and/or desktops.
- **Human resources.** How ready are your staff and clinicians for the change? What are they looking for in the implementation? Talk to your team to understand what EHR implementation success looks like to them. Assure the team they will receive initial and ongoing training support.

## Plan your goals

One of the most important steps in planning is identifying areas of inefficiency and waste in your workflow processes. Investing in a new EHR platform and trying to make it fit with your existing processes could create major implementation delays and limit the maximum benefit you will receive. Now is the time to evaluate your workflows and document each workflow, if you have not already.

Understand how your business operates so you can map them to the workflows of your new EHR solution. The right vendor will have built a solution with best practices for your business in mind that creates a greater level of operational efficiency and saves you unnecessary customization costs. Keep an open mind to their workflow solutions and for best results, focus on changing your processes to fit their technology solutions.

Next, define your goals and objectives for each segment of your business with clear deliverables and timelines. Part of your behavioral health EHR implementation roadmap is transition requirements, including specific tasks and their owners. Make sure everyone, from staff and clinicians to upper-level management, is on the same page and agrees to the timelines.

Finally, create a project transition team. Include individuals from each department or function for insight into their diverse roles. As part of this tiger team, appoint a staff member willing to become the EHR's champion and create interest and excitement for the upcoming changes.

# Select your EHR Provider

You can and should ask several questions of each behavioral health EHR vendor you consider. The following questions are most pertinent.

1. **Security.** Make sure your EHR vendor encrypts data, and securely stores and backs up your data
2. **Support.** Beyond implementation, does the behavioral health EHR vendor provide support and service on an ongoing basis? Also, do they provide training to all staff?
3. **Clinical needs.** Will the EHR system allow clinicians to enter therapy notes? How much information can clinicians record? Can clinicians easily export and share notes?
4. **Practice management needs.** Can you monitor the growth of your practice? Can you send appointment reminders via calls, text, or emails? More importantly, can you analyze outcomes and patient quality of care?
5. **Billing needs.** Are coding and billing information broken down by staff and service types? Can you submit claims automatically to payers?
6. **Implementation.** How large is the EHR vendor's project implementation team? Do they have the requisite experience?
7. **Cost.** Do costs include ongoing service and updates to the system? What about add-on services and integrating with e-Prescribing and lab tools? Are there additional costs you need to budget for on a continuing basis?





# Preparing for change

Whether you are moving from paper records to an EHR solution or switching from an existing system that is not meeting your needs, change can be hard. A successful change management plan can ease the process and will help to engage everyone involved and show them why and how the coming changes will be to their benefit.

To get buy-in, everyone on board needs to feel involved in the process. Clear, transparent communication and the following steps are important:

- **Benefits.** Outline how the new EHR solution benefits the individual, the team, and your organization.
- **Communication.** Communicate effectively and consistently as much as possible.
- **Understanding.** Ready everyone and ensure all parties are on the same page as to objectives, the roadmap, and expectations.
- **Celebration.** Celebrate the small victories and celebrate often.
- **Log.** Keep a “lessons learned” log whenever you encounter obstacles. Determine how to avoid them to eliminate setbacks in the project timeline.
- **Tiger team.** Create a tiger team who can champion the change throughout your organization.
- **Agility.** Be agile in making improvements as you go and be open to changing how things have been done in the past to allow room for efficiency gains.

Training will be vital now and on an ongoing basis after your new EHR solution goes live. Identify users in each role in your agency willing to be the point person for questions or concerns from their peers. Create a communication plan across the organization to capture all questions and their answers. This helps eliminate repeated questions that can lead to frustration.

## Going live and beyond

Finally, it is time to go live with your new solution. Your behavioral health EHR implementation roadmap takes your hard work and preparation and when executed will ensure successful utilization across your organization. Develop a strategy to make sure your agency's staff is self-sufficient going forward.

A best practice is to have your new EHR provider document your new workflows within your EHR solution and create training documents for every step. During the implementation phase, assess each operational step to see how staff members are using the new system and make adjustments as necessary. Take advantage of the platform's dashboards and reports to monitor how your EHR system is performing, and gather feedback both positive and negative for improvement.

Another best practice is to clearly define a request/change process and appoint an individual to handle it. You can also take the feedback you receive to redesign workflows to reflect your users and the EHR's functionality.

Training is an ongoing need for all users as new features and functionality become available. Make sure your plan doesn't end with “go live,” but is a continual process of refinement and improvement.

# CONCLUSION

By referencing this guide and putting an EHR implementation roadmap in place you will position your organization to have a successful implementation and better outcomes. However, successful implementation is a marathon, not a sprint. Take your time and plan early.

Communicate early and often the benefits of implementation so everyone is on the same page about objectives and expectations. Remember to celebrate your victories as you go, and create a “lessons learned” log to avoid setbacks. Build your tiger team to champion the implementation, and be agile in making improvements as you go.

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## THE REMARKABLE HEALTH DIFFERENCE

Remarkable Health (formerly known as ClaimTrak) is the leading provider of EHR software focused on the behavioral health and human services industries. For more than 25 years we have passionately focused on providing behavioral health, substance abuse, and human service organizations the tools they need to provide remarkable client experiences. We offer a purpose-built, integrated platform consisting of Electronic Health Record (EHR)—Clinical, Billing, Scheduling, Reporting, and Medication Management—for inpatient, outpatient, and residential facilities.

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