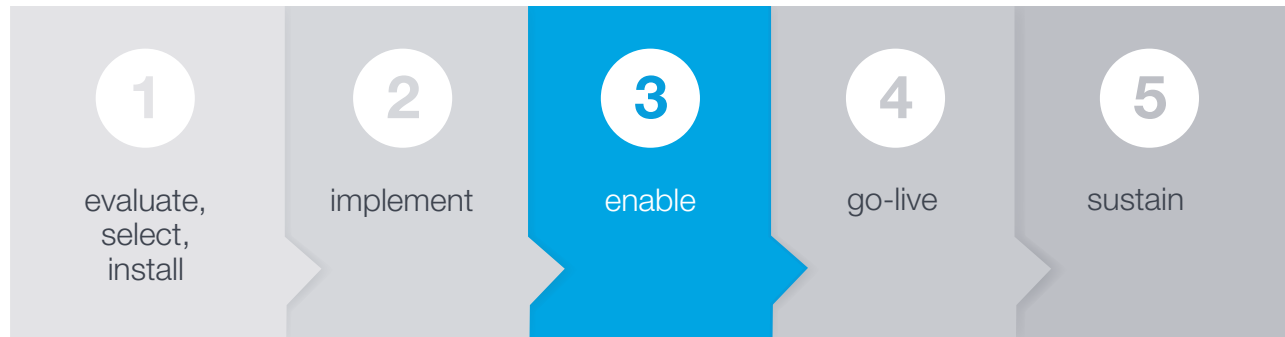


# A Roadmap to Achieve Successful EHR Adoption



## The Importance of User Adoption in Your EHR Implementation

The investment you've made in EHR software is likely one of your most significant software investments in recent years. You have a two-fold challenge now: 1) ensure your staff and your extended enterprise are prepared to use the software at go-live to maintain quality care, minimize issues, and reduce impacts to productivity, and 2) continue to grow usage and mastery to both achieve incentives based on 'meaningful use' and see a high return on investment (ROI) from your EHR software.

Full adoption of your EHR software is a prerequisite to achieving the benefits you expected when you procured the software. Plus, you have an opportunity to maximize benefits of current and future stimulus initiatives on your organization when you prove meaningful use and adoption. Enablement activities – such as training – are an integral part of achieving adoption, but these activities are often overlooked during implementation. Investing in training will ensure your team is fully prepared for initial use and ongoing adoption of your selected EHR software. A plan for training must be a part of your larger implementation plan.

**72%** said **effective**

**user adoption** was the most important factor for realizing values... "Many a software deployment delivers 100% on the business requirements only to fail in the final phase of user adoption". <sup>1</sup>

1 - Achieving Enterprise Software Success, TSIA, Neochange, SandHill.com survey of IT buyers and software executives

## Planning Your Training Investment to Achieve Adoption and Compliance

EHR implementations pose unique challenges where training is concerned:

- You have a large and diverse set of affected users across multiple business areas. Some of these users will require only basic knowledge of the software. In most cases, however, users will require in-depth training to achieve mastery.
- Your training plan must be developed with an eye toward 1) meeting patient needs/expectations, and 2) ensuring compliance to a plethora of regulations.
- Probably not all of your affected users are employees; independent physicians and their staff, as well as other partners, are affected.
- Education for your physicians, nurses, and other practitioners needs to be succinct, targeted to their responsibility, and available on mobile devices.
- You will probably uncover training needs beyond the new software, such as impacts to your other IT systems, your processes, and existing workflows.

These challenges can be addressed by creating a detailed training analysis and development plan. Your training plan will help you identify affected users and roles, map roles to required training needs and formats, schedule training efforts over phases, and identify touchpoints beyond the EHR software. Your plan will ensure you've covered a typical progression through a training curriculum:

- Overview and 'why' training to introduce the software and highlight the value and benefits
- Task-based training – ideally available on-demand from mobile devices – to cover the how-to's of the new software
- Ongoing performance support in the form of on-the-job quick references

Your training plan will also identify the right types of content and activities. Today, technology enables many opportunities beyond just one-time classroom training. Performance support material – available on-the-job and on the device of choice – should be a key element of your plan. Your learning content and activities can include:

- Instructor-led classroom training
- Self-facilitated, repeatable, on-demand elearning courses available from both desktop workstation and mobile device
- Work instructions to document step-by-step instructions for various tasks
- Simulations that mimic the live EHR environment for practice and assessment
- Dry run sessions where mock patients progress through the system
- Practice sessions where staff exercise their skills by converting existing records into the new EHR system
- Quick references (online or paper-based) to support on-the-job performance

The greatest value is recognized by a single development effort to publish the above content (elearning, work instructions, performance support).

**“Enterprises that treat training as an investment, rather than a cost experience, have higher levels of end-user acceptance and improved application productivity over the life of the application.”<sup>2</sup>**

## Sample Adoption Roadmap and Checklist

The table below provides questions and checklist items for adoption considerations: from planning, through training material creation and delivery to, finally, optimization and sustainment of your efforts.

- Is this a phased implementation?  
If so, plan to perform a training analysis for each phase to ensure you deliver the right training – at the right time – for each phase.
- Work with your implementation team to identify the functionality to be included at go-live – down to the task level within the software.
- Identify the affected roles within each business area.
- Identify affected roles outside of your staff (non-staff physicians, partners, etc.).
- Map all roles to user names.
- You now have a matrix that lists task:role(s):name(s).
  - For each task, identify what learning content you will need to develop.
- Inventory training resources available from your EHR vendor, such as task and role maps, sample curriculums, suggested training timelines.
  - Determine the resources you can leverage for your training plan.
- What general awareness training – the ‘why’ behind the implementation – do you need for a broad audience?
  - Identify a senior leader to introduce and/or deliver this overview.
- Assess your users’ computer skills and determine if any additional training is necessary.
- Evaluate your EHR vendors’ user adoption content. What vendor-provided content can you leverage:
  - For high-level overview training needs?
  - To train your super users?
  - To customize for user how-to’s?
- What environments must your online training materials support?
  - What web browsers and browser versions are standard?
  - What mobile devices (tablet, smartphones) will be used to access content?
- How are you currently developing and delivering training in your organization?
  - Do current methods support multiple content outputs (elearning, simulations, performance support)?
  - Can you easily update content for a new implementation phase or upgrade?
  - Do current methods support delivery on mobile devices?
- For users outside your organization, how will you ensure they can access content?
- Talk to peer organizations about their lessons learned regarding user adoption:
  - Obtain benchmarks from peers around productivity impacts in the period after go-live.
  - Socialize that there may be a loss in productivity – plan for this and set a goal for return to previous productivity levels.
- Work with your technical implementation team to identify training implications related to other IT systems, processes, and workflows.
- Identify your super users – those individuals who will be the functional expert for a particular area of the software and/or business unit. These users can serve as credible, trusted coaches and instructors.
  - Make a plan for recognizing individuals who take on a super user role
- What are your needs around converting existing patient records to the new EHR system?
  - What practice opportunities might this provide?
- Identify your training developers:
  - Will your developers come from your internal training/HR team? From an outside contractor?
  - Will you leverage super users as training developers?
- Identify your instructors.
- Create standard conceptual and procedural templates that include your branding,
- Will you need to track performance of certain tasks, such as high-risk areas and/or areas where you need to report/prove compliance?
  - Consider incorporating quizzes or simulation assessments.

## IMPLEMENTATION PHASE

2-3 months prior to go-live

- Create your planned training materials (on-demand elearning, simulations, procedures).
- Ensure you create content that will support on-the-job performance:
  - Paper-based quick references.
  - Online help available from directly within the EHR system.
  - Small 'microlearning' chunks for consumption on mobile devices.
  - Promote use of this on-the-job support during training sessions so users can help themselves at go-live.
- Conduct train-the-trainer sessions for your super users/instructors to prepare them to lead classes.
- Distribute the curriculum to users to provide information on upcoming training.
- Schedule classroom training and publish schedule.
- Conduct classroom training.
- Communicate availability and location of on-demand elearning courses.
- Report on user readiness (the good and the bad) across the enterprise – to all affected stakeholders, especially managers/supervisors who can directly intervene.
- Set aside some amount of work hours for practice:
  - Conduct labs where users can safely practice using simulations to mimic the live environment.
  - Conduct mock patient sessions.
  - Practice by converting existing health records.
- Determine how you'll disseminate critical, late-breaking news and updates at go-live.

## SUSTAINMENT PHASE

Go-live and beyond

- Schedule a training team debrief to discuss lessons learned.
- Review software logs and help desk requests to identify frequent errors and questions:
  - Identify opportunities for refresher training and/or 1-on-1 remediations.
- Conduct a supervisor debrief to share areas where users are challenged:
  - Assist supervisors with suggested coaching or remediation exercises so they can quickly assist their team members.
- Recognize those individuals who played special roles and/or had special achievements – for example, super users and personnel who invested personal time into education and practice.
  - Share their success stories ("How I mastered EHR") with their peers and with new employees being trained for the first time.
- Incorporate lessons learned into your training curriculum and materials to prepare for training new hires.
- Sustain user enablement by documenting responsibilities for on-going maintenance of content.
- Apply your enablement approach (and your training technologies) to other initiatives – such as other software rollouts, process changes, or business transformations.
  - For example, you may find many of your efforts could be applied to ICD-10 training.
- Apply your best practices to EHR software upgrades. Don't assume that upgrades will 'run themselves' in terms of training because you've completed your first major implementation.

**Remember:** investing in user adoption is not a nice-to-have but, rather, a key activity on the path to EHR success, quality care, and financial returns. As you develop and socialize your training plan, take every opportunity to speak about your efforts as an investment, not an expense.

### About ANCILE

ANCILE Solutions, Inc. provides solutions that enable organizations to realize the full potential of their technology investments by creating, delivering, and sustaining moments of understanding that drive user adoption across the entire software lifecycle. ANCILE's award-winning solutions, including ANCILE uPerform®, ANCILE uAlign®, ANCILE uGuide™, and ANCILE uLearn™ have been chosen by over 19 million users and more than 4,400 customers across the globe, including half of the Fortune 100.