



ILLINOIS FOUNDATION FOR QUALITY HEALTH CARE

EHR Go Live Planning Checklist

Note: Your EHR project team should review this list and add any items that might be specific to your practice.

Staff

- ☐ Has been trained on new EHR policies and procedures and has signed off indicating that they understand the new policies and procedures.
- ☐ Staff has completed EHR application training (education session sign in logs have been verified).
- ☐ All morning staff has been instructed to arrive to work 30 minutes early to prepare for the first patients.
- ☐ Staff has performed a “system walk through” of a patient visit from beginning to end, allowing questions to be answered and minor glitches to be corrected.

The Practice

- ☐ Appointment times/schedules have been modified to allow for the EHR learning curve.
- ☐ Signs have been placed around the practice to let patients know that an EHR is being implemented and requesting patience with delays.
- ☐ Phone tree message has been updated with an informative message stating that the practice is implementing a new EHR and requesting patience with delays.
- ☐ Go live day “break area” has been established with snacks and drinks (non-alcoholic) for the staff.
- ☐ Expectations have been set that the go live day might not be perfect, but we will get through it if everyone does the best job they can.

Application

- ☐ All users have signed on to the system with their user names/passwords. Everyone can log on and has the correct privileges.
- ☐ The EHR build is complete and practice has signed off on.
- ☐ The EHR has been tested and practice has signed off on.
- ☐ Paper reports/forms that will be generated out of the EHR have been tested.

Support

- ☐ Support escalation procedures (procedures that define what actions will be taken in the event there is a problem, who will manage the problem internally, and if necessary, who will report the problem to the vendor) have been completed and are in place. The escalation plan has been communicated to all staff and to the vendor.
- ☐ The practice support team has been trained and is aware of their roles/functions for go live.
- ☐ Morning, noon and evening support team “huddles” have been established to check in and review the issues.

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- ❑ A point person has been identified and will be available to make critical system changes on the fly.
- ❑ Your EHR vendor has been notified of your go live and is on site or on stand by for support.

Backups and Downtime

- ❑ System backups have been tested and validated. Of site storage of backups has been arranged.
- ❑ Downtime procedures have been established and are ready to go, if necessary.
- ❑ Paper copies of all patient forms, templates, etc.; have been made available in the event of a system failure.

Connectivity

- ❑ All PCs have been checked and the EHR application can be accessed.
- ❑ Wireless PCs/connections have been checked and areas without connection or “dead spots” have been identified.
- ❑ If you are using an ASP model, redundant lines have been checked.
- ❑ EHR system faxes have been tested and are working.
- ❑ EHR system interfaces have been tested and are working.
- ❑ All PCs/wireless devices can connect to a printer and print from the HER

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