

Electronic Health Record (EHR) Implementation GO-LIVE Planning Checklist

SEQUENCE LEGEND	GO-LIVE Planning	Several Days Prior to GO-LIVE	Day Prior to GO-LIVE	Day of GO-LIVE	Post GO-LIVE
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STAFF (Implementation Team)

Item/Person	Planning	Testing	GO-LIVE	Post GO-LIVE Support
Anne Frunk	Task and oversee project timelines	Ensure all aspects of testing is complete and on time	Remain available to shadow various departments	Compile success metrics and troubleshoot any obstacles presented
Dr. Waverly Dr. Jones	Oversee planning tasks involving clinicians	Final review of clinical testing & workflows for final approval	Serve as clinician champions supporting EHR rollout	Available for live support post go-live to clinicians; conduct clinician huddles; document feedback
Mrs. Wright Mrs. Jones	(Partner with Dr. Waverly; Dr. Jones)	Ensure templates are ready-open issues closed	Support clinical staff day of go-live; provide refreshers	Available for live support post go-live to clinical teams and medical staff
Mrs. Johnson	Oversee patient and staff scheduling, medical staff workflows	Ensure EHR and hardware training is complete; users assigned logins	Available for password resets, medical staff workflow refreshers	Assist when system issues occur; answer questions and remain available for support
Ms. Felps Ms. Smith	Work with vendors; tasking, ordering, e-prescribing, data migration	Test electronic transmissions; communications; and record keeping	All communications function properly with contracted EHR vendors and interfaces	Assist when system issues occur; answer questions and remain available for support
Mr. Lawrence	Develop billing SOPs for EHR GO-Live	Billing and claims functionality	Billing processes support new EHR	Troubleshoot any and all EDI workflows and claims issues

HARDWARE (Identify Hardware Needs)

Item/Person	Planning	Testing	GO-LIVE	Post GO-LIVE Support
Computers	Ensure every user had a feasible workstation	Verify readiness, user IDs and passwords, hardware connections	All computers meet necessary specifications and are appropriately distributed	Extra equipment readily available; IT support on standby
Telephone Internet	Research network needs; security; and call center SOPs	Connections, speed, dead spots; phone tree	All devices have been checked; all users can access via internet	See down-time procedures
Printers	Research network needs; security; and call center SOPs	Connections, Printing specifications based on print job	Meets specification of billing, medical records and prescriptions	Extra equipment readily available; IT support on standby

DOWNTIME PROCEDURES

Item/Person	Planning	Testing	GO-LIVE	Post GO-LIVE Support
Mrs. Wright	Develop Down-Time Policies and Procedures	Down-Time SOPs tested and approved	EHR down-time testing is complete	Assist with standard operating procedures during down-time
Mrs. Wright Mrs. Johnson Ms. Felps Ms. Smith Mr. Lawrence	Prepare paper copies of patient forms, templates, and billing superbills	Tested paper workflows and data migration for when system is back-up	Paper packets ready when needed; process for scanning documents is implemented	Staff available for unforeseen modifications and process improvements