

## Electronic Health Record Optimization

### *Critical Success Factors*

Healthcare systems vary greatly in both their approach to and focus on Electronic Health Record (EHR) Optimization. For this article, the definition of optimization is any enhancement to an EHR system regardless of urgency, priority, or level of effort.

How long is your organization's EHR Optimization request list? Is there a well-defined process and workflow in place, understood throughout the organization, to handle these optimization requests?

Whether your organization is just establishing an EHR Optimization plan, or you are looking to improve your current processes, the HealthBPM approach includes an overall EHR Optimization assessment.

Important critical success factors include:

- EHR Optimization Governance
- EHR Optimization Requests Categorization
- EHR Optimization Requests Tracking (incident management system)
- EHR Optimization Communication
- EHR Optimization Releases and Training

### **EHR Optimization Governance**

Will your existing EHR governance structure handle EHR Optimization governance? We have seen the most success when a clearly defined EHR Optimization governance is established, including guiding principles and a decision-making process to successfully manage the prioritization process.



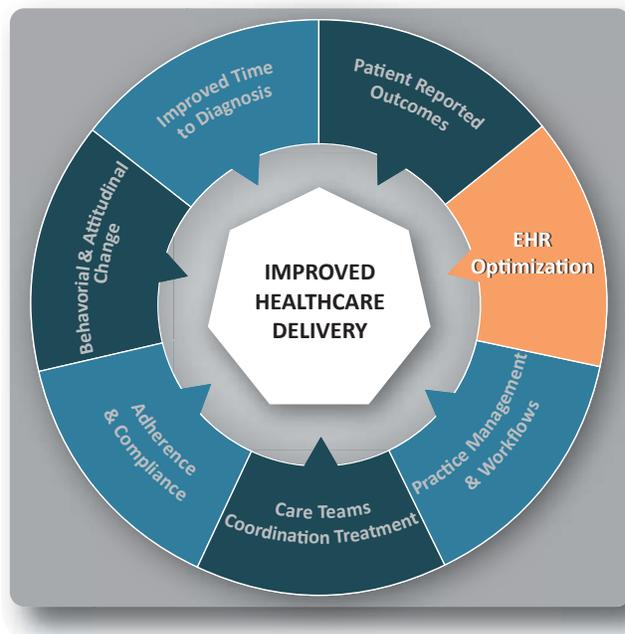
It is critical that the governance model is owned and led by Operations executives, partnering with EHR and Information Technology (IT) leadership. Operations leaders have the knowledge to validate the legitimacy and the scoring of the optimization requests for the organization before they are brought forward to the prioritization process. EHR and IT leadership present the technical details of what can and cannot be done in the EHR and with other technical requests. They also manage the resources that will need to complete the optimization work. The most common EHR Optimization governance committee structures include the following:

- Clinical Advisory Committee (some organizations have both an Inpatient and Outpatient Committee)
- Access and Revenue Cycle Advisory Committee
- IT Technical Advisory Committee
- Supply Chain Advisory Committee

### EHR Optimization Requests Categorization

Leadership across the organization should define EHR Optimization priorities, aligned with the organization's strategic goals, that can be used to categorize and score each optimization request. These categories can guide users who are entering the optimization requests, whether that be into an incident system or onto an automated form. Adding a rating/weight scoring algorithm will provide a consistent and fair process for evaluation, assessment and prioritization of the optimization requests. Prioritization review during committee meetings should include the following considerations:

- System wide benefit: Is this desired by all hospitals and/or clinics in the system, a key department across the system or just one location or user?
- Complexity and risk: resource, cost, and time impacts?
- Common optimization request scoring categories include:
  - Alignment with Strategic Plan
  - Patient Safety
  - Organizational Impacts
  - Revenue Impacts
  - Regulatory Requirements



## EHR Optimization Requests Tracking (incident management system)

Having the ability to track EHR Optimization requests from request initiation to EHR system change is a critical success factor for the EHR Optimization process. This allows for documentation and tracking throughout the entire EHR Optimization process: request, evaluation, prioritization, change planning and release planning.

## EHR Optimization Communication

Those who submit EHR Optimization requests appreciate a built-in feedback loop. If utilizing an automated system, optimization requests should be tracked with the status and outcomes visible to all users, if possible. Individual requestors should also receive real-time communication about committee decisions related to their requests. Internal organizational websites provide an effective means of communicating to broad audiences, at least monthly, to provide transparency related to EHR Optimization status and progress. And, don't forget about communicating all EHR Optimizations to the end users – small to large.

## EHR Optimization Releases and Training

Because of communication and training requirements, best practice dictates optimizations released into the EHR should be monitored closely within the organization's overall EHR release planning process. This process normally includes planning for both training and communication as well.

EHR Optimization release and training question considerations include:

- Creating guidelines like the couple that follow set clear expectations for the organization's EHR user community.
  - Optimizations are part of EHR scheduled releases.
  - Optimizations will not occur during scheduled EHR build black outs.

“By tracking every optimization request within our incident management system, Atlantic Health System can provide real-time transparency to the work requested, in progress, deferred, and completed for every application and service line. It helps our IT department to share a meaningful story with our operational governance leaders about the many enhancements that are being made to support them and to reprioritize work when needed.”

- Kate Corbett, Epic Program Director  
Atlantic Health System, Morristown, NJ

- While it may seem like common sense, EHR Optimization training should reflect the complexity of the enhancement being made to the system.
  - Tip Sheets/Flash communications are commonly used for the very simple workflow enhancements and screen changes.
  - Short training videos can be employed when key points need be made about less complex changes.
  - When enhancements are large and or include complex workflows, impact multiple handoffs, etc. – multiple training options should be considered, up to and including classroom training.
- End user EHR competency and satisfaction should always be considered when making EHR Optimization training approach decisions.

**If you are looking to improve your EHR Optimization efforts, HealthBPM can partner with your Operations and EHR teams to create a focused approach.**

**Contact us** today to align your organization’s EHR Optimization strategy and operations with your vision. We utilize dual lenses of behavior and technology to provide you with actionable insights, not just interesting information. Let’s work together to develop a plan that meets your unique needs.



HealthBPM  Better Performance Management

If interested in learning more about our EHR Optimization and HealthBPM please contact **Neil Rolland** at [nrolland@healthbpm.com](mailto:nrolland@healthbpm.com) or 952-239-5733.

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