Example of an activation checklist

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|  | Task | Practice lead | Days to complete | Due date |
|  | **Prepare the practice.** |  |  |  |
|  | Identify implementation team. |  |  |  |
|  | Assess current technology. |  |  |  |
|  | Evaluate WAN/LAN connectivity (as applicable). |  |  |  |
|  | Identify system infrastructure (e.g., workstations, printers, telephones, fax machines and scanners). |  |  |  |
|  | Evaluate devices to be integrated (e.g., ECG, X-ray, MRI and CT). |  |  |  |
|  | Determine custom applications (e.g., legacy EHR and practice management system). |  |  |  |
|  | Create integration plan. |  |  |  |
|  | Perform site assessment with the change team and EHR vendor. |  |  |  |
|  | Determine network productivity model and transformation plan. |  |  |  |
|  | Identify integration opportunities (e.g., laboratory test results and ECG results). |  |  |  |
|  | Create comprehensive device configuration plan. |  |  |  |
|  | Develop equipment relocation map. |  |  |  |
|  | Confirm new equipment orders (e.g., hardware and furniture). |  |  |  |
|  | Develop strategy for chart abstraction. |  |  |  |
|  | **Initiate staff training.** |  |  |  |
|  | Develop training strategy to meet the needs of each EHR user (e.g., identify new workflows). |  |  |  |
|  | Determine training method (e.g., online learning and remote or on-site instruction). |  |  |  |
|  | Allocate time for training (e.g., during or after clinic hours). |  |  |  |
|  | **Secure IT equipment and services.** |  |  |  |
|  | Order equipment. |  |  |  |
|  | Obtain the necessary hardware (e.g., computers, keyboards, printers, phones, patch cables and network and wireless connectivity equipment). |  |  |  |
|  | Acquire additional furniture (e.g., desks, monitor mounts and printer stands). |  |  |  |
|  | Find a storage area for new equipment. |  |  |  |
|  | Manage delivery of new equipment. |  |  |  |
|  | Identify hardware support team (e.g., practice-based staff or IT service provider). |  |  |  |
|  | **Configure hardware.** |  |  |  |
|  | Install equipment (e.g., computers, workstations, printers, scanners and fax machines). |  |  |  |
|  | Identify equipment that needs to be installed or configured. |  |  |  |
|  | Test new equipment to ensure complete functionality. |  |  |  |
|  | **Configure software.** |  |  |  |
|  | Determine critical build elements (e.g., patient demographics, treatment regimens/protocols, standing orders and consents). |  |  |  |
|  | Identify EHR printer queues based on new workflows (e.g., after-visit summaries, laboratory test orders and prescriptions). |  |  |  |
|  | Create integrated system connections (e.g., laboratory and pharmacy). |  |  |  |
|  | Create templates for various parts of the EHR (e.g., progress notes, letters and inbox messaging). |  |  |  |
|  | Account for the patient panel when creating templates for launch. |  |  |  |
|  | **Transfer data.** |  |  |  |
|  | Identify data transfer team. |  |  |  |
|  | Determine the roles and responsibilities of staff. |  |  |  |
|  | Use data transfer process as an opportunity for physicians and staff to practice using the new EHR before launch. |  |  |  |
|  | Identify critical data to transfer into the new EHR. |  |  |  |
|  | Transfer essential data based on the EHR launch approach (e.g., preferred pharmacy, medication list, past medical history and immunization history). |  |  |  |
|  | **Manage adoption process.** |  |  |  |
|  | Allocate time for the launch. |  |  |  |
|  | Reduce workload as necessary depending on the launch approach (i.e., immediate or incremental). |  |  |  |
|  | Assess readiness level of physicians and staff. |  |  |  |
|  | Ascertain level of comfort with new workflows. |  |  |  |
|  | Prepare patient-centered communication tactics. |  |  |  |
|  | Develop conversational scripts for physicians and staff when engaging with patients during a visit. |  |  |  |
|  | Proactively communicate with patients (e.g., send informational letter). |  |  |  |
|  | Create implementation plan for physicians and staff. |  |  |  |
|  | Determine workflows to alleviate any confusion during launch. |  |  |  |
|  | Gain practical EHR training experience (e.g., utilize simulation environment and data transfer activities). |  |  |  |
|  | Address additional training needs of physicians and staff. |  |  |  |
|  | Arrange implementation support for activation. |  |  |  |
|  | Obtain internal and/or external support (e.g., additional super users, clinical experts, vendor representatives). |  |  |  |
|  | Create practice feedback mechanism for physicians, staff and patients to quickly identify and resolve issues. |  |  |  |
|  | Celebrate successes (e.g., recognize team efforts to keep morale high throughout the adoption process). |  |  |  |

*Source: AMA. Practice improvement series: EHR selection and purchase. 2015*