Ease Your Transition to EHR with Comprehensive Training

By Robert L. Bass, OD, FAAO

In moving to EHR, good training and a well-paced adaptation period can ease the transition. Free training is available from your vendor—and supplemental training may be worth the added expense.

Transitioning to electronic health records is not a simple intuitive process. Even the most user-friendly systems require training and practice. If you neglect to adequately prepare yourself and your staff for the transition to EHR, you won’t be able to use the system to its full potential. There will be functions the system has that you won’t know how to tap into, and you probably will make mistakes when inputting patient data. These mistakes could lead to the system not being able to provide you with the information you need to provide superior care, meaning you may not be able to easily access the patient’s medical history and past product preferences, among other data. Here is how my practice trained and practiced for the implementation of Eyefinity Practice Management, OfficeMate Edition and Eyefinity EHR, ExamWRITER Edition.

Ask Upfront About Complimentary Training

Our Eyefinity sales rep let us know right from the beginning about the complimentary training we were entitled to. Information about these training resources were presented at the beginning of our relationship with the company and listed in the paperwork we signed. We were told not to activate or “go live” until all doctors and staff had completed training on all parts of the system. We had to attest that training was completed before we could take the system live.

We trained from August-November 2009. Then we practiced through January 15, 2010, and went live. An OfficeMate trainer only came to the office at implementation; Our staff did all training in our own office including the completion of internet classes, webinars, taped classes and by phone to ask questions. We were only closed a 1.5 days before implementation to convert from the old system and for the onsite trainer to see what we knew and needed help with.

We decided to have the trainer onsite for implementation just to reassure staff who were concerned about what would happen if they got confused or a mishap occurred in the first day or two of implementation. As it turned out, everything ran smoothly, but it was a huge psychological help to have the trainer present. It gave our staff the confidence they needed to get started using the system.

Practice Using the System

Before you go live using the system with real patients, practice inputting hypothetical information. For example, the other doctors and our staff used ourselves and family members as patients to practice inputting information. Each evening before we went home for the day, we would take three different types of patients—one who needed eyeglasses, another who needed contact lenses and a medical patient and input information for each of these “individuals” all the way to the point of checkout.

Close During Initial Transition to EHR and Scale Back for Several Days

Before you start seeing patients with the new EHR in use, it is a good idea to make sure the system is ready to go and functioning adequately. For that reason, we closed for one-and-half days to accommodate the transition to EHR. I estimate that it cost us between $3,000 to $5,000 to be closed for that day-and-a-half, but it was worth it because we knew that way that when we took the system live the technology would be working as it should and that the initial information that needed to be inputted to get the system started would be there, ready-to-go. We could have completed the transition to EHR over a weekend, but with all the extra work my staff had been doing, I wanted to do it during their normal salaried days. We didn’t want to cut into our staff members’ weekend time.

We scaled back operations about 30 percent for the first four days the system was in use. We planned on keeping operations scaled back for more days, but found we were comfortable enough with the system to resume our full schedule after just those four days.
Make Additional Training Investment--If It Is Necessary: $3,000

For many practices, the complimentary training is enough, but if you feel more is needed, on-site trainers are available. We decided to pay for a trainer to be on-site for the first two days we took the system live. Eyefinity provided the on-site trainer—at a cost. In addition to the fee for the person's time, we also were expected to pay for their travel and lodging expenses. We ended up spending about $3,000 for the on-site help of this trainer. I feel it was worth it, as this person's presence ensured that whatever happened with our use of the system during those first two days, we would be able to adequately serve our patients.

On-Demand Training

Unlike the old days, when trainers had to be physically present and training times scheduled for specific slots of time, the beauty of the world we live in now is the ability for anytime/anywhere training. Our initial training was with ExamWRITER trainers over the phone, but since then we have been able to take advantage of online (and offline) manuals and recorded webinars and videos.

All the material is available for free to ExamWRITER users on the company's web site where it is easy to locate the manuals and videos. What's more, when you are in the EHR, you can hit F1, and the system will display background information about the part of the system you are in and offer a how-to on whatever you are struggling with.

Get Used to a New Way of Doing Work

Doctors in our practice struggled with getting used to not having a folder in their hands to refer to, and having to remember to input the patient's information into the EHR. Practicing helped, however, and soon the doctors knew exactly where to look in the system to retrieve patient data and how to easily input data. The doctors did all the information retrieval and inputting first to see what would be needed, and once the routine was established, these tasks were partly turned over to support staff. Our staff now inputs pre-exam information and the doctor inputs in exam info and closes and bills each exam as they go. Establishing this routine and communicating it to staff was accomplished during office hours and maybe cost us a few lunches.

Ongoing, On-the-Job Training

Even after completing training and practicing, questions will come up. For that purpose, many EHR systems have online portals where you can type in a question, or have access to an index of commonly asked questions. For instance, we have access to ExamWRITER's Knowledge Base Tab, a comprehensive online user’s manual that is searchable by topic. You type in a topic and you are taken to the part of the manual that contains the answer to your question. This portal covers any questions that come up. It has background information, how-to information and tips for where to find information in the EHR. The related videos can be reviewed by new hires in your office, before on-the-job training begins. These resources are always there, always accessible to our entire staff, and entirely complimentary.

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Robert L. Bass, OD, FAAO, is the owner of Optometric Associates, PC, in Manassas, Va. To contact: idr.bass@verizon.net