EHR Training: How to Set Your Practice Up for Success

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Financial Disclosures

- MedNetwoRx, LLC – Employee

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Overview

• Training Opportunities

• Learning Styles

• Training Styles

• Important Considerations

Training Opportunities

• EHR/PM IMPLEMENTATIONS

• UPGRADES/UPDATES/NEW VERSIONS

• TRAINING NEW STAFF

• ONGOING ISSUES & CHART AUDITS

EHR/PM Implementations

• Complete a workflow analysis
  - Consider workflow improvements that the system will offer
  - Monitor staff flow

• Identify a core group of staff & management to ensure the project implementation is a success
  - Buy In, Commitment, Ownership & Responsibility

• Dedicate Time & Resources
  - Setting up the system and configuring to your practice
  - Testing and understanding the workflow of the system
  - Training your staff
  - Allowing your staff the time to practice in the system
Upgrades, Updates, and New Releases

- Review the system release notes
  - Ask questions
  - Secure a date to work towards

- Consider or revisit your workflow analysis
  - Does this affect our internal workflow?
  - Could the updates help improve workflows?
  - Who will you select to test the upgrades?

- Dedicate time to re-train
  - If upgrades include BIG changes, train as if it’s a whole new implementation
  - Good time to revisit best practices

Onboarding New Staff Members

- Who is responsible for training new staff?
  - Super users and trained trainers
    - Utilize those that take an interest in learning and training
    - Identify the best personalities for this role
    - Great technical skills do not always represent great training ability

- Classroom vs. On the job training

- Shadowing vs. After the fact chart audits

Ongoing Issues & Chart Audits

- Proactive vs. reactive responses to ongoing issues with EHR documentation
- Actively solicit feedback from all departments
  - Front Desk
  - Technician/Scribes
  - Providers
  - Billing
  - Compliance?
- Hold ongoing training to address areas where performance may be less than desired
  - Schedule in advance
• What missed training opportunity would you go back in time to correct?

• How have you remedied that oversight now?

Learning Styles

- **NEIL FLEMING’S VARK MODEL**
  - Visual Learning
  - Auditory Learning
  - Read/Write Learning
  - Kinesthetic Learning

• Size of Practice
  - Do you have the ability to split up and accommodate different styles?

• Differences in Teams
  - Are your techs learning styles different than front desk?

• Timing
  - Does your schedule/time table allow to break out into different groups

• Provide a mix of training to meet all learning styles
What is the biggest challenge you’ve faced with different learning styles in regards to training staff?

How did you address meeting all types of learning styles in your training experiences?

Training Styles

- WEBINAR
- ONLINE VIDEOS
- CLASSROOM
- USER TO USER
- POST TRAINING TESTS
- SELF PRACTICE

- Consider a combination of all types
- Identify Super Users who can help train your other staff
  - These users become a big resource for staff after go-live and initial implementation
- Gauge your user’s understanding with tests and practicing after training
  - Make them SHOW you!
What have you found to be the best, most effective form of training?

What is the biggest lesson you’ve learned when training staff on EHR?

Important Considerations

- Assess your workflow frequently
  - Find efficiencies and missed opportunities for functionality
  - Where can I cut “clicks?”
- Direct/Indirect costs
  - Training – during hours or after hours?
  - Clinic downtime / staff overtime
- Length of training sessions
  - No more than 1-2 hours
  - Short attention span / less value
**Considerations**

- **Marrying workflow with meeting MIPS**
  - Training your staff on which clicks help meet measures and why it is important
- **Consider reports needed to ensure all pieces of the workflow are completed**
  - Orders for special testing
  - Interpretations
  - Chart notes generated
  - Does your superbill match what the visit entailed?

**Considerations**

- **What are you going to do with paper records?**
  - Scan last visit?
  - How will you maintain consistency/quality control
  - Prioritizing charts
  - Storage / Staffing
- **Testing & imaging equipment**
  - DICOM vs. Print and scan
- **Sharing passwords**
  - Don’t!
  - Who enters what?

**If I had to do it all over again, I would …**

**What is the biggest piece of advice you would provide as clinics continue down the path of EHR in regards to training their staff and preparing their providers?**
Thank You!

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