



EHR Selection and Implementation for Dentists

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Healthcare Intelligence

EHRs – Benefits in Our Digital World

Definition of an Electronic Dental Record (EDR)



The American Dental Association defines the EDR as:

- An electronic health record (EHR)
- It is a combination of processes and data structures, used by dentists for purposes of documenting or conveying clinical facts, diagnoses, treatment plans, and services provided.



It's a Digital World



- Our world has been radically transformed by digital technology – smart phones, tablets, and web-enabled devices have transformed our daily lives and the way we communicate.
- Medicine in all its specialties is an information-rich enterprise.
- A greater and more seamless flow of information within a **digital** health care infrastructure, created by EHRs, encompasses and leverages digital progress and can transform the way care is delivered and compensated.
- With EHRs, information is available whenever and wherever it is needed.

Source: Levingston, S. A. (2012). Opportunities in physician electronic health records: A road map for vendors. *Bloomberg Government*.

Benefits of EHRs



- Improved patient care
- Practice efficiencies and cost savings
- Improved care coordination
- Increase patient participation
- Improved diagnostics and patient outcomes



Providers & Patients: A Win-Win



- Providers with busy practices—and patients with busy lives—appreciate convenience in their health care transactions. EHRs can help.
- Providers can typically access patient files or submit prescriptions remotely—from home or while on vacation.
- With more complete patient information, providers improve their ability to make well-informed treatment decisions quickly and safely.



Improved Health Care Quality & Convenience for DENTISTS



- Quick access to patient records for more coordinated, efficient care
- Enhanced decision support, clinical alerts, reminders, and medical information
- Performance-improving tools, real-time quality reporting
- Legible, complete documentation that facilitates accurate coding and billing
- Safer, more reliable prescribing



Improved Health Care Quality & Convenience for PATIENTS



- Reduced need to fill out the same forms at each office visit
- Reliable point-of-care information and reminders notifying providers of important health interventions
- Convenience of e-prescriptions electronically sent to pharmacy
- Patient portals with online interaction with providers
- Electronic referrals allowing easier access to follow-up care with specialists



Efficiencies and Cost Savings



- Many providers have found that EHRs help improve practice management by increasing efficiencies and cost savings.
- A national survey of eligible professionals who are ready for meaningful use offers important evidence:
 - 79% of providers report that with an EHR, their practice functions more efficiently
 - 82% report that sending prescriptions electronically (e-prescribing) saves time
 - 68% see their EHR as an asset with recruiting staff
 - 70% report enhancements in data confidentiality

Source: Jamoom, E., Patel, V., King, J., & Furukawa, M. (2012, August). *National perceptions of ehr adoption: Barriers, impacts, and federal policies*. National conference on health statistics.

ADA Involvement With EHR Activities



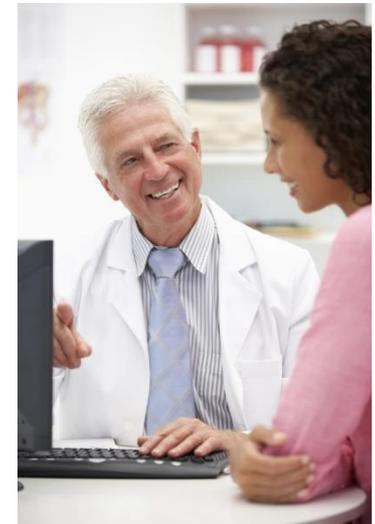
- ADA has taken a leadership role in defining dental EHR functions, features, and capabilities through its work in the standards arena.
- ADA has developed an internationally recognized dental terminology, the Systematized Nomenclature of Dentistry (SNODENT) for the purpose of a standard terminology for capturing detailed clinical data in a coded, structured manner.
- ADA has been leading in development of dental information technology standards via its ANSI-accredited Standards Committee for Dental Informatics (SCDI).



Sample of EHRs in Iowa Dental Practices



- Axiom
- Curve Dental
- Dentrrix
- Eaglesoft
- Emdeon
- GE Centricity
- Henry Schein Practice Solutions, Inc.
- LSS Data Systems
- MacPractice, Inc
- NextGen
- Mitochon Systems, Inc.
- nextEMR, LLC
- Practice Fusion
- Practice-Web
- Total Dental
- XLDent MU



Sources: Iowa Medicaid/CMS EHR Incentive Program Attestations and the Iowa Health Information Technology and Meaningful Use Environmental Scan 2015

Payment Reform: Quality Over Quantity



- Meaningful Use (of certified EHRs) Program will begin folding into the new CMS Quality Payment Program (QPP) in 2017
- Payment incentives and disincentives to Medicare Part B reimbursement will accompany the QPP based on quality of care rather than quantity
- While payment adjustments may not have a significant impact to dentists in the immediate future, the pressures will build from other payers to look at quality payment models
- Dentists will not want to find themselves left behind in the national push toward digital health care and financial impact

PATH TO IMPLEMENTING AN EHR

Path to Implementing an EHR



- Step 1:** Assess Your Practice Readiness
- Step 2:** Plan Your Approach
- Step 3:** Select or Upgrade to a Certified EHR
- Step 4:** Conduct Training and Implement an EHR System
- Step 5:** Achieve Meaningful Use
- Step 6:** Continue Quality Improvement



Source: HealthIT.gov (Office of the National Coordinator for Health IT)

Step 1

ASSESS YOUR PRACTICE READINESS

Assessment Phase



- The assessment phase is foundational to all other EHR implementation steps
- Involves determining if your practice is ready to make the change from paper records to electronic health records (EHRs), or to upgrade your current system to a new certified version.



Why Implement EHRs?



- The assessment phase should address the following question: “WHY” implement EHRs?
- This EHR implementation step should help dental practice leadership evaluate their current state to determine what is working well and what can be improved.



Key Questions to Consider



- Some of the questions dental providers ask themselves during this phase include:
 - “Am I accomplishing what I thought I would be doing when I decided to go to dental school?”
 - “Are we providing the best possible care to our patients, or are we simply trying to make it through the week?”
 - “If I had more time, what would I do differently?”
 - “What would it be like to leave the office yet stay connected to my practice?”
 - “Am I positioning myself for the national shift to payment for quality and alignment with the national interoperability roadmap?”

Key Considerations

- At this stage, dental practice leadership and staff should consider the practice's:
 - **Clinical goals**
 - **Needs**
 - **Financial readiness**
 - **Technical readiness**



The assessment should look at the current state of the practice:

- Are administrative processes organized, efficient, and well documented?
- Are clinical workflows efficient, clearly mapped out, and understood by all staff?
- Are data collection and reporting processes well established and documented?
- Are staff members computer literate and comfortable with information technology?

The assessment should look at the current state of the practice:

- Does the practice have access to high-speed internet connectivity?
- Does the practice have access to the financial capital required to purchase new or additional hardware?
- Are there clinical priorities or needs that should be addressed?
- Does the practice have specialty specific requirements?

The next EHR implementation step is to envision the future state of the practice.

- What would the dental practice leadership like to see different in the future? More specifically:
 - What will be different for the patients?
 - What will be different for the providers?
 - What will be different for the staff?



Set Goals



- Goals and needs should be documented to help guide decision-making throughout the implementation process.
- Set goals in areas that are important and meaningful to your practice.
 - These may be clinical goals, revenue goals, or goals around work environment.
 - Goals in all three areas will help assure balanced processes after the implementation.
 - Goals that are important to you will help you and your staff through the change process.



“SMART” Goals Process



- Follow the “SMART” goals process which includes setting objectives and goals that meet the following criteria:
 - **SPECIFIC** – Achieving the goal would make a difference for our patients and our practice
 - **MEASURABLE** – We can quantify the current level and the target goal
 - **ATTAINABLE** – Although the goal may be a stretch, we can achieve it
 - **RELEVANT** – This is worth the effort
 - **TIME BOUND** – There are deadlines and opportunities to celebrate success!



Goals and Staff



- Goals and needs may need to be re-assessed throughout the EHR implementation steps to ensure a smooth transition for the practice and all staff.
- These goals become the guide posts for an EHR implementation project, and achieving these goals will motivate dentists and dental staff to make necessary changes and attain new skills.



Critical Outcomes: Assessment



Critical outcomes of the assessment process include:

- **A designated leadership team** for the EHR implementation process (clinical and practice management staff, or for small practices, the entire team). Having strong and positive advocate(s) for change can be one of the strongest tools to guide the transition.
- **A unified vision**, where each member of the dental team understands how they will be affected by the change and understands the roadmap to success.
- **Measureable, quantifiable, realistic goals**, which are the key to the assessment phase

Step 2

Plan Your Approach

Plan: Clarify and Prioritize



- Building an EHR implementation plan is critical for identifying the right tasks to perform, the order of those tasks, and clear communication of tasks to the entire team involved with the change process.



Plan: Clarify and Prioritize



- One effective first step in the planning process is for the team to segment tasks into three categories:
 - What new work tasks/process are we going to **start** doing?
 - What work tasks/process are we going to **stop** doing?
 - What work tasks/process are we going to **sustain**?
- The start/stop/sustain exercise helps clarify what the new work environment will be like after the change and help the team prioritize tasks in the overall EHR implementation plan.



Steps in the Planning Phase



Here are some tactical steps that typically occur during the EHR implementation planning phase.

1. Analyze and map out the practice's current workflow and processes of how the practice currently gets work done (the current state).
2. Map out how EHR will enable desired workflows and processes, creating new workflow patterns to improve inefficiency or duplicative processes (the future state).
3. Create a contingency plan – or back-up plan – to combat issues that may arise throughout the implementation process.

Steps in the Planning Phase - *Continued*



4. Create a project plan for transitioning from paper to EHRs, and appoint someone to manage the project plan.
5. Establish a chart abstraction plan, a means to convert or transform, information from paper charts to electronic charts. Identify specific data elements that will need to be entered into the new EHR and if there are items that will be scanned.



Steps in the Planning Phase - *Continued*



6. Understand what data elements may be migrated from your old system to your new one, such as patient demographics or provider schedule information. Sometimes, being selective with which data or how much data you want to migrate can influence the ease of transition.
7. Identify concerns and obstacles regarding privacy and security and create a plan to address them. It is essential to emphasize the importance of privacy and security when transitioning to EHRs.

Step 3

Select or Upgrade to a Certified EHR

EHR Selection

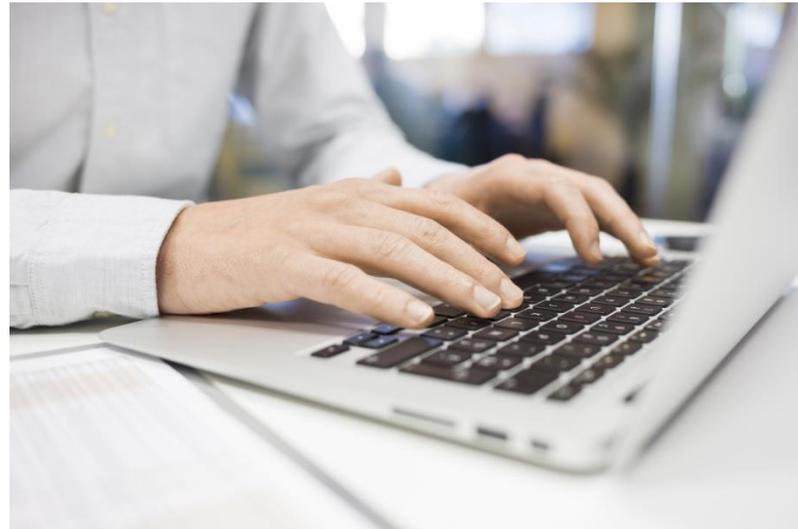


- Selecting an EHR system is a critical decision and a significant planning task.
- Some practices go through the planning process and develop the selection criteria they wish to use.
- Other practices begin by selecting an EHR system and then conduct planning to support the selected EHR system.
- Most practices develop an initial plan to identify their key goals, select an EHR system that supports these goals, and then finalize their plan after the selection.

EHR Software Comparison



- After establishing the dental practice's objective(s) and planning how the EHR will affect workflows, the leadership team and staff can determine what to look for when considering and selecting an EHR system.



Considerations for EHR software comparison:

1. Understand if and how a vendor's product will accomplish the key goals of the practice.
 - This is a test drive of your specific needs with the product.
 - Provide the vendor with patient and office scenarios that they may use to customize their product demonstration.
2. Clarify start-up pricing before selecting an EHR system (hardware, software, maintenance and upgrade costs, option of phased payments, interfaces, customized quality reports).

3. Define implementation support (amount, schedule, information on trainer(s) such as their communication efficiency and experience with product and company).
4. Clarify roles, responsibilities, and costs for data migration strategy if desired. Sometimes, being selective with which data or how much data to migrate can influence the ease of transition.
5. Server options (e.g., client server, application service provider (ASP), software as a service (SAS))



6. Ability to integrate with other products (e.g., practice management software, billing systems)
7. Privacy and security capabilities and back-up planning
8. Linking payments and EHR incentive rewards to implementation milestones and performance goals
9. Vendor's stability and/or market presence in region
10. Consider costs of using legal counsel for contract review verses open sources through medical associations

Certified EHR Systems

- Certification ensures that the EHR technology providers choose to adopt offers the necessary technological capability, functionality, and security to help them achieve meaningful use.
- Eligible health care providers must use certified EHR technology to qualify for incentive payments.
- More than 500 certified Complete EHRs or EHR Modules are listed on the Certified Health IT Product List (CHPL).

<http://oncchpl.force.com/ehrcert>



Step 4

Conduct Training & Implement the EHR System

- EHR implementation involves:
 - Installation of the EHR system
 - Dentist(s) and staff training
 - Mock “go-live” of the system
 - Pilot testing

- The EHR implementation plan and schedule (developed during the planning phase) should be followed and executed during this phase.



EHR Implementation & Training



- Execute chart abstraction plan and other data migration plans in conjunction with your EHR vendor
- Execute EHR implementation training plan that includes your practice specific goals and needs
- Address privacy and security risk management mitigation plan



Step 5

Achieve Meaningful Use

Achieve Meaningful Use



- The Medicare and Medicaid EHR Incentive Programs provide a financial incentive for achieving "meaningful use" (MU)
- MU is the use of certified EHR technology to achieve health and efficiency goals.
- MU core and menu objectives for eligible professionals (EPs) as outlined by CMS are intended to set a baseline for electronic data capture and information sharing.



Achieve Meaningful Use



The MU objectives are grouped into 5 patient-driven domains that relate to health outcomes policy priorities. Each core and menu objective is aligned to one of the following domains:

- Improve Quality, Safety, Efficiency
- Engage Patients & Families
- Improve Care Coordination
- Improve Public and Population Health
- Ensure Privacy and Security for Personal Health Information



Step 6

Continue Quality Improvement

Continue Quality Improvement



- This final phase refers to reassessing what you have learned from training and everyday use of the system.
- It emphasizes continuous evaluation of your practice's goals and needs post EHR implementation to continue improving workflows that achieve your goals and needs while leveraging the functionality of EHRs:
 1. Were the goals and needs met?
 2. Do workflow processes need to be re-evaluated?
 3. Is additional training required?

Continue Quality Improvement - *Continued*



4. Are you capturing the required data elements needed for internal clinical priorities, as well as for reportable quality measures?
5. Do staff roles and responsibilities need adjustments?
6. Is the technology in the appropriate locations?
7. Is the technology reliable?
8. Is the technology “fast enough?”
9. Is additional hardware needed?



Evaluate Your Implementation



- A post EHR implementation evaluation will help shape both the practice and its evolution.
- Often, what happens during the implementation phase is very different from what was planned.
- Regularly evaluate processes to ensure that the practice is functioning efficiently to ensure staff and patient satisfaction.

EHR Lessons from the Field



- **Lesson 1** – Rapid transition from paper charts to EHRs helps ensure success
- **Lesson 2** – Conduct chart abstraction before “go-live”
- **Lesson 3** – Cut back on patient load during “go-live” period
- **Lesson 4** – Make training a priority



Helpful Resources

Helpful Resources



HealthIT.gov Website

<https://www.healthit.gov/providers-professionals/ehr-implementation-steps>

Iowa DHS Health Information Technology (HIT) & Electronic Health Records (EHR) Website

<http://dhs.iowa.gov/ime/providers/tools-trainings-and-services/medicaid-initiatives/EHRincentives>

CMS EHR Incentive Programs & Meaningful Use

<https://www.cms.gov/Regulations-and-Guidance/Legislation/EHRIncentivePrograms/index.htm?redirect=/ehrincentiveprograms>





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