

Needs Assessment

Group Name [Practice/Team]

Version: 1.1

Date: Feb 12, 2008

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Document creation date:

Last saved: 5/13/2008 3:26 PM

PITO Phase

3: Planning & Analysis

Purpose

The purpose of this template is to serve as a place to document office workflow, EMR functional requirements, non-EMR software, hardware, network, facilities and support services required to achieve the vision and goals of EMR project (future state). By first documenting the existing processes, tools and services in use by the practice (current state) the gaps and changes required will be identified. Understanding the current state and the gaps required to achieve the desired future state will help to ensure an informed and appropriate decision when selecting an EMR vendor.

Goals

- Encourage critical thinking about workflow
- Articulate what is unique about the practice
- Begin to quantify the degree of change that is likely to be experienced by the practice, and who is likely to be most affected
- Inform budgeting activities and EMR Vendor Selection process

Contributors

At least one representative from each role (Physician, MOA, Nurse, Reception, etc.) should be interviewed.

Audience

This document is required by the core project team to complete project planning. **This document is drafted by PITO and then updated and owned by the practice.** This document will also be of great value to your EMR Vendor and should be made available to them once selected.

Next Steps

1. EMR Functional Requirements
 - Update **EMR Vendor Selection Tool** with practice specific requirements – existing requirements from the *Current State* column and new requirements from the *Future State* column
2. Future State Needs Summary
 - Create first draft of your budget using the **Budget Tool**
 - Review **Action Plan** scope statement for any updates
 - Acquire any additional project resources, if required
 - Draft PITO Field Resource Statement of Work (SOW), if required

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1. EMR Functional Requirements

Legend:

- **Current State**

- o Rank: Please rank each process. **1-** very frustrating; **5-** needs improvement; **10-** perfect
- o Supporting tools: Document what tools are used. Ex. Software/database, forms, email, day sheet, etc...
- o Degree of change: Try to categorize the degree to which the current state is likely to change. Add any comments.
- o Process questions: Please answer the questions and add any other relevant information about the specific process
- o See “PITO Needs Assessment_Process Guide” for assistance with review of current processes

- **Future State:**

- o What process changes are desired? What is your wish list?

Current State				Future State
Process Name	Rank	Supporting Tools	Degree of change	How could an EMR improve this process?
1. Internal Communications		<input type="checkbox"/> Sticky notes <input type="checkbox"/> EMR Messages <input type="checkbox"/> Memos <input type="checkbox"/> _____ <input type="checkbox"/> Email <input type="checkbox"/> Intercom	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	
-How do phone messages get communicated?				

Current State				Future State
Process Name	Rank	Supporting Tools	Degree of change	How could an EMR improve this process?
2. Scheduling & Phones		<input type="checkbox"/> Outlook <input type="checkbox"/> Phone System <input type="checkbox"/> Osler <input type="checkbox"/> _____	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	
<p>-Who is responsible for scheduling? -Is there a dedicated person to answer phones? -How do doctors access the schedule? -How does the Nurse access the schedule? -Does everyone in the office use the same scheduling system?</p>				
3. Patient Check-in & Triage		<input type="checkbox"/> Day Sheet <input type="checkbox"/> _____ <input type="checkbox"/> _____	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	
<p>-Who does check in? -How do you track no-shows? - Who does the pt. vitals? - Who see's the pt. first? - How does the doctor know the patient is in? -What do you do with urgent visits/walk-ins?</p>				

Current State				Future State
Process Name	Rank	Supporting Tools	Degree of change	How could an EMR improve this process?
4. New Patient Registration		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> _____	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	
-How do you create a new chart? - What forms are used?				
5. Referrals / Consults (info out)		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> _____	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	
-What information usually goes with the referral / consult? -Who books the appointment with the specialist? -Who informs the patient of their appointment?				

Current State				Future State
Process Name	Rank	Supporting Tools	Degree of change	How could an EMR improve this process?
6. Diagnostic Orders (info out)		<input type="checkbox"/> _____ <input type="checkbox"/> _____	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	
-What are your top 3 orders? -What order forms do you use most?				
7. Results & Consults Management (info in)		<input type="checkbox"/> _____ <input type="checkbox"/> _____	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	
-Is results management centralized? - Who processes & files results? -How do you process urgent results? -How do you schedule follow ups?				

Current State				Future State
Process Name	Rank	Supporting Tools	Degree of change	How could an EMR improve this process?
8. Rx Management & Renewals		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> _____	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	
<i>-How do you manage pt. medication lists? -How often do you use special authority forms? -How do you get physicians approval of renewal requests?</i>				
Empty space for notes				
9. Patient Assessment		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> _____	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	
<i>-What flow sheets do you use? -Structured templates? -Medical guidelines & reference materials</i>				
Empty space for notes				

Current State				Future State
Process Name	Rank	Supporting Tools	Degree of change	How could an EMR improve this process?
10. Dictation & Transcriptions		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> _____	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	
<i>-Do you dictate? -Who does typing for 1) Encounter notes, 2) Referrals/consults, 3) Medical legal?</i> -Only dictate medical legal and referrals				
11. Population Health		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> _____	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	
<i>-How do you track recalls? -Do you use your billing system to report on patient populations? -What CDM flow sheets are you using? (Talk about PSP if not already participating)</i>				

Current State				Future State
Process Name	Rank	Supporting Tools	Degree of change	How could an EMR improve this process?
12. Billing & Coding		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> _____	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	
<p>-Who codes? When? -Do you do blended funding? -How are hospital visits captured and billed? -How are re-submissions processed? When? -Accounts Receivable? -WCB? -Does everyone use the same billing system? -Is anyone part of the Alternative Payment Program?</p>				
13. Medical Office Filing		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> _____	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	
<p>-Are all results and consults filled immediately? -Are phone messages filled in the chart? -Are the charts organized in chronological order? -Is there a dedicated person who does filing? -How do transcribed notes end up on the chart?</p>				

2. Future State Needs Summary

Software				
Item	Current State	# Users / PCs / Licenses	Desired Future State	# Users / PCs / Licenses
EMR (vendor, version)				
Billing & Scheduling (vendor, version)				
Dictation / Transcription (vendor, version)				
PharmaNet (vendor)				
Electronic Lab Reports (vendor)				
Fax Software				
Microsoft Office (version)				
Antivirus				
External Interfaces (owner, source, destination)				
Other				

Hardware						
Item	Location / Owner	Qty.	Make, model, OS	Desired Future State	Total Qty.	Net New
PCs	Reception Administration Nursing Area Phys. Office Exam Rooms	=		Reception Administration Nursing Area Phys. Office Exam Rooms	=	=
Laptops		=	=		=	=
Tablets		=	=		=	=
Printers	Reception Administration Nursing Area Phys. Office Exam Rooms	=	=		=	=
Print, Fax, Photo (3-in-1)		=	=		=	=
Scanners		=	=		=	=
Label Printers		=	=		=	=
PDA, Pocket PCs, etc.		=	=		=	=
Phones		=	=		=	=

Local Area Network					
Item	Current State	Total Qty.	Desired Future State	Total Qty.	New Req'd
Internet Provider (Shaw, TELUS, etc.)					
LAN	Wired Wireless None				
Network drops	Reception Administration Nursing Area Phys. Office Exam Rooms				
Modem			Will be provided by TELUS (4x6x8 inches)		
Routers / Switches					
Un-interruptible Power Supply (UPS)					

Facilities			
Item	Current State	Location description	Desired Future State
PPN Demarcation Point	Dedicated power circuit? Y / N Temperature?	Off the floor? Y / N Access?	

Ongoing Support Services				
Item	Current Service Levels	Current Service Provider	Desired Future State	Future Service Provider
Hardware (Desktop) Support				
Network (LAN) Support				
Software Support: -Billing / Scheduling -PharmaNet - other...				
Telephone / Switchboard				
Paper Shredding				
Storage				

Additional Implementation & Transition Support Services				
Item	Required?	Proposed Service Provider	PITO Service?	Notes
Computer Skills Training				
Project Management				
Team Building				
Privacy Workshop				
Detailed Workflow Analysis				
Ergonomic Assessment				
LAN review / set up				