Introduction
You’ve decided to convert your paper patient records to electronic. Great! One of the biggest pitfalls physicians find themselves tumbling into is stasis – “this is the way it’s always been done.” Doctors can become stuck using techniques (such as paper records) that aren’t the most efficient, simply because it’s what they are used to. You’ve taken a step forward by reevaluating the way your office currently runs and have realized that there are many advantages to implementing an EMR.

After you’ve performed all the research and found the most ideal EMR for your practice, you’ve cleared quite a few hurdles. But the process from paper to EMR is one that should be undertaken carefully. We’ve outlined the steps and provided hints along the way to ensure you have a successful conversion.

Tip: It is always a best practice to alert your legal team of your decision to convert. They can keep you aware of patient requirements and record laws for your state.
Step 1: Become an EMR Evangelist
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Your staff looks to you as the leader and captain of their ship. You must project a confidence and security in this new decision. Conversion is a top-down process, and it starts with you.

• Show that you are excited and completely bought-in to the conversion.
• Select one of your staff to be a power user, learn the system from top to bottom, and serve as trainer to the other team members.
• Motivate staff to work as a team.
• Set expectations that the entire practice will use the new EMR, that there are no exceptions. If you give them room, some team members will make every attempt to continue working “the old way,” which will only serve to muddle the conversion process and may put you at risk with maintaining accurate patient records.
Step 2: Choose Your Conversion Date
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A successful conversion starts when you have a game plan. The game plan starts by you choosing the date you will officially stop using paper records and begin using the EMR for all patient-related activities.

Things to keep in mind:

• You’ll want to schedule your conversion date far enough out that you and your staff have enough time to complete everything related to the conversion process, but not too far away from your EMR training, so that details are still fresh in everyone’s minds.

• A Monday or the first working day of your week is an ideal day to schedule conversion.

My EMR conversion date will be_____________________________
Step 3: Ready the Office
Congratulations! You officially have a conversion date. It’s something to look forward to, but there are a few things to align in the practice before you get to that date. First up is scheduling an “office day” where you complete the patient scheduling process.

On your office day, clear your calendar. This will actually take two forms:

- First, really do clear your calendar and do not schedule any patients or other meetings. You and your staff should be fully focused on your EMR goals.

- The second part has to do with transferring your patient schedule. However you currently have it – pencil and paper calendars, another software program – today’s the day you get everything into the EMR. Empty out your old calendar, starting with the planned conversion date and going forward. All patient appointments from that point on should go into the EMR.

My EMR office date will be _________________________.

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Step 4: Prepping Patient Charts
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One of the biggest decisions to make during the EMR conversion process is what to do with all of your existing patient charts. Some physicians have an entire room dedicated to paper—how to decide what to keep, what to scan, what to discard?

**Note:** The laws pertaining to how long you keep medical charts still apply when you convert to an EMR. Most states require physicians to maintain access to 7 years of records, whether via paper or electronic output.
Step 4: Prepping Patient Charts

Plan to ask yourself:

• Am I going to continue to keep that back room full of paper records, even after the conversion?
• Am I going to scan every piece of paper in those records into the EMR and then discard the paper?
• Am I going to start fresh with patients going forward on the EMR?
• Will I do a combination?
Step 4: Prepping Patient Charts

This decision is really contingent on your preferred work style. You can certainly consult others and ask how they achieved conversion success, but your own satisfaction is going to rely on how you are most comfortable.

- Picture what you most want to know, see, and read just as you enter a patient’s room for consultation. Most chart data becomes obsolete very quickly – you’re not leafing back to look at pages from six years ago. You’re looking to see the patient’s vitals, last test results, notes from the most recent appointment.

- Consider efficient work practices – both yours and your staff. If you have thousands of patient records, dedicating a resource for full-time scanning is probably not the best use of anyone’s time. You’ll be clogging up the EMR with data you’ll never look for again.

**Recommendation:** Think about the absolute data you need to reference in regard to your patients, and go back 6 months. Load those into your EMR, and retain the rest in the same way you were doing before EMR conversion.
Step 5:
Prepping the Patients
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- **Your office day should also include time to contact your patients and inform them of the conversion.** Although technically, the conversion of paper records to an EMR doesn’t outright affect patients, they’ll probably notice a difference in the way they’re interacting with you and your staff. Use the conversion as an excuse to have a touch-point with your patients and bring them into the process.

- **Explore your EMR’s option for auto-notification.** Depending on your EMR, you may be able to configure patients to receive an email (at the email address registered with your practice) alerting them of their new EMR patient portal account. But you should be in touch with them before that point so they know what is going on and why they are receiving the notification.
Step 5: Prepping the Patients

Be sure to cover the following points with your patients:

• Conversion date
• A short explanation of electronic medical records and why they benefit the practice
• Assurance that patient records are safe, secure, and accessible
• Request for patience as the practice gets up to speed with the conversion
• An explanation of the benefits associated with the EMR, including the power of the patient portal to allow patients secure messaging, appointment scheduling and confirmations, refill requests, lab test results, and more, where applicable in the EMR of your choice
• How to get in touch with the office with any questions or concerns
Step 6: Practice Time
Step 6: Practice Time

Prior to the actual conversion day, consider having a dry run. Create a test patient and go through the entire practice of a patient arriving for an appointment through check out. Include the following in your testing of the EMR:

• Front desk staff greets the patient, finds him in the system, and gets him checked in
• Arrival in the patient room and opening of the patient record; prepping the physician
• Physician reviews patient’s history, tests, medications, and questionnaire
• Physician completes test requests and medication refills
• Physician adds notes to the patient record
• Staff schedules follow-up and/or additional appointments
• Staff demonstrates the patient portal, including logging in, medication refill requests, appointment confirmations, and secure messaging
• Patient completes payment

My EMR run-through date will be ____________________________
Step 7:
Support Your Staff
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Much of the focus of paper to EMR conversion is ensuring that patients are comfortable, but don’t forget your staff. Not only are they the link between you and your patients, but they’re going to have quite a bit of interaction with the EMR themselves.

It’s a fact of life that many people are afraid of or resistant to change. Whether your staff has “always been doing things this way” or have just gotten comfortable with paper records, the switch to an EMR may be scary. Be sure to listen to staff’s concerns, have them fully participate in training, and let them ask questions. Talk through problems and bring lists of challenge points to your EMR support representatives.

Work in some team building and appreciation to the process. Bring in a catered lunch on office day, distribute gift cards, offer to let the staff have an early release one day. Spoil the staff to keep them motivated for the big change.
Power2Practice

Power2Practice is the first integrative medicine EMR software platform dedicated to the unique clinical needs of the integrative medicine practice. Through an entirely cloud-based system, Power2Practice’s electronic medical record solution is easy to use and instantly intuitive.

With Power2Practice, physicians can actively engage patients in the health and wellness process. Features such as billing, connections to major medical suppliers and laboratories, and automatic appointment confirmation ensure no time is wasted.

Please contact us at www.power2practice.com, email info@power2practice.com, or call 800-590-7459 for a free, live 30 minute demo.