



EHR Project Management Tools

As an independent consultant, I do a lot of project management. Highly organized by nature, I am always looking for computer tools that can make managing the project easier and more organized. I also do a lot of work remotely at client sites and there are some free or very inexpensive programs that can enhance your project management. I have pulled together a listing of my favorite tools to share with you as you prepare to implement your new electronic health record system. Any project, big or small, can be helped or improved with good organization and easy access to your data. The tools can be broken down into three main categories; collaboration, on-site and project support.

Collaboration:

A large part of consulting and project management is collaborating with your clients, your team and staff. The following tools can help keep you organized and be used to facilitate this collaboration.

Doodle

This application is very useful for scheduling group meetings. Once you have set up your free account, you can email out meeting options to a group. One feature I like is the ability to send the invite to myself first, then to others from my own email system. The system can even handle different time zones.

<http://doodle.com/>

Calendar programs such as Outlook, Thunderbird, and Google Calendar

I'm old fashioned; I like a paper calendar. However, by scheduling meetings in one of these programs, I can invite others via email. Recipients can then choose to save the appointment in their e-calendar, accept, decline, or tentatively accept the appointment. You can include directions in the invitation

such as conference call numbers and/or on-line collaboration website information (see Go To Meeting and FreeScreenSharing below). Google Calendar allows you to share your calendars on-line with other people and is great for setting up team meetings.

[Thunderbird](#) (Free)

[Google Calendar](#) (Free, requires an account)

[Outlook](#) (Comes with Office, \$150 - \$500 depending on the version you purchase).

Google Docs

Google Docs is a free, web-based all-in-one word-processor, spreadsheet and presentation program. Google Docs allows you to edit documents online while collaborating in real-time with other users.

<https://docs.google.com>

Dropbox

Dropbox is a wonderful tool for storing, accessing and sharing files. You set up an account, move files to the folder, and the system synchronizes the files across multiple computers and even your smart phone. The data are also stored on line for easy retrieval. One additional feature is the ability to

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share a file or folder with other people. This makes moving large files or collaborating on documents simple. If you are the owner of a file, the system will even notify you via email when a document is updated. The system works on PC's, Mac's and even Linux machines. You automatically receive 2GB of free data storage free; in addition, you can "earn" more storage as other people sign up as a result of having been sent a link by you in order to work on a

shared file. The system also allows other people to upload files to your site with an additional program called [Drop It To Me](http://dropitto.me/) (<http://dropitto.me/>). **Note:** There is some question as to the security of this add on, so read up on it or avoid sending Protected Health Information (PHI) or other confidential data.

<http://www.dropbox.com/>

GoToMeeting

Conference calls are great, but on-lines meetings that permit participants to talk on the phone and view files simultaneously are even better. GoToMeeting allows you to invite others to a meeting, share documents and programs (like an EHR), easily switch presenters (allowing users to see the presenter's desktop program(s)), and text message the group or only certain members during the session. You can even record the session if you like. The cost is \$49.00 per month or \$468 per year for unlimited meetings.

Meeting Dashboard, a no-cost alternative provides most of the same features and also allows you to set up a virtual "lobby" that your guest(s) will see while waiting for the meeting to begin. For example, you can include your logo, files such as agendas, contact information and more in the virtual lobby.

www.gotomeeting.com

www.freescreensharing.com

Skype

Skype is a free video sharing program. It is great for video calls when a face to face meeting is just not possible. For better sound quality, be sure to invest in a headset/microphone. Video calls require either a built in webcam or an add on. Skype recently added the capability to share your screen with another computer. This allows you to share documents, presentations, etc. while you are talking over the web. The basic version of Skype is free. To do group meetings, you need to purchase one of the more advanced versions. Skype also has a mobile version. Skype is not considered secure by most security experts, so for now, I am not recommending using this for client interactions, accessing an EHR, or other PHI. Similar to some social networking sites, you have to add people to your approved "Contacts" list (and they have to add you) before you can Skype with them.

www.skype.com

Survey Monkey

When you need a quick survey of your committee or staff, Survey Monkey is a free, on line, easy to use, but sophisticated survey tool. The system helps you to set up surveys that have Likert scales, multiple choice, open ended questions and many other question types. There are even templates for you to use to get started.

www.surveymonkey.com

On-site tools

The following are tools I use when on-site interacting with staff, doing presentations and running meetings.

Evernote

This on-line application is used for taking notes. The nice feature is that the notes can be accessed and synched online and to multiple computers. Evernote is free and stores 60MB/month (there is also a paid version with higher limits and more features). You can send emails to your Evernote account and they will go into a folder you designate. You can also save documents, pictures and web links. The system is smart and can even "read" pictures you take and store for content. It works on most computers and mobile devices and this makes it handy for grabbing that forgotten file or jotting down a note on the run.

www.evernote.com

PowerPoint and Prezi

PowerPoint (or Keynote) is a great tool; but greatly overused. If you are presenting to a group, it is fine to use PowerPoint to outline your presentation. Use bullet points, but never ever read off your slides and be careful not to cram too much information onto one slide - death by PowerPoint is way too common (see great [cartoon](#) by Dilbert creature Scott Adams). Try a free on line tool called Prezi to spice up your presentations. To keep your presentation private in Prezi, you will have to pay for the upgrade (\$59 or \$159 per year). You can check out an example of a Prezi presentation I created at this [link](#).

[PowerPoint](#) (Comes with Office, \$150 - \$500 depending on the version you purchase).



[Prezi](#)

Good agenda and minutes templates

One of the most important project management tools you will use is your meeting agenda and minutes template. While taking minutes be sure to end each topic with an "Action Items" section, and include who is responsible for following up on the item and when it is due. There are plenty of templates available on line.

Project Support

Carbonite

I am a stickler for safety. Up until last year I used an external hard drive to back up all my data daily. The problem is, you are not always at home or work to be able to back up your data, and even the external drives can fail. You also have to remember to plug them in and use them if they are not wireless (which the newer ones are)! Last year I went to an on-line, automatic back up system. There are many out there and it is worth shopping around. I use Carbonite. It is easy, not expensive (\$54.95 a year) and I can access my files from anywhere. The only requirements are that the computer be on, and you have an internet connection. A small dot appears next to each file in Windows Explorer to let the user know if the file is backed up.

www.carbonite.com

To the man who only has a hammer, everything he encounters begins to look like a nail.

~ Abraham Maslow

OpenOffice

While I have nothing against Microsoft's Office suite, it becomes expensive to keep current with the newest versions. OpenOffice is a nice alternative. It comes with word processing, spreadsheet, presentation, drawing and database programs. It is also completely free. **Note:** A bit of a learning curve exists with regard to the commands you use. OpenOffice runs on Windows, Macs and Linux systems. You can also save documents in Word, Excel and several other formats to make sharing documents easier.

www.openoffice.org/

Spreadsheets

There is nothing like a good spreadsheet; they have lots of uses. I track the time I spend on each project, contacts, summarize data, etc. Be sure to take the time to learn how to graph data – it is always easier to quickly grasp concepts when you present them in graph forms.

Work Logs

A simple word processing document for each project or project component allows you to keep a running report of meetings, decisions, and the all important TO DO list.

Project Management Software

There are many project management software systems available on line and many contain features

with the capacity to manage complex, multiphase projects. Some of these maybe too complicated for an EHR implementation. One that I do like is called CRM Excel Template The template works on both PC's and Macs. Developed as a template for Excel, it's easy to use, customize and flexible to move as fast as you need to when multi-tasking, taking notes, jumping from project to project ... all of which happens during the course of a day.

www.crmexceltemplate.com (\$99 and use the promotional code: "Intro10%")

(Full Disclosure: This template was created by my brother David Oshlag, a project management consultant who has 25+ years experience working with companies such as Heinz, PPG Industries, GlaxoSmithKline and others.)

These are some of the tools I use. Hopefully, you will find these useful. I am always looking for more ways to increase efficiency and stay organized so email me your ideas!

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