

# DRAFT

## Site Technology Planning Worksheet for Provider-Related Equipment, Space and Services

Area and site management staff might use this worksheet periodically (at least every six months) to assess their clinical users' immediate and longer term technology needs. The purpose of the worksheet is to help managers survey their users for both existing and new uses of technology for patient care. Use some or all of the questions/issues below to develop site-specific questionnaires for your staff.

### General

Assess the general computer proficiency level of *most* of your clinical users:

Superusers       Computer literate       Basic level       Non users

Providers currently use IT primarily for:

Office/Admin       Patient Care       Both equally

Does your site have an IT Strategic Plan?     Yes     No

If yes, were providers involved in its development?     Yes     No

Are any of your providers purchasing their own IT equipment, i.e., PDAs?     Yes     No

If yes, does your site have recommended hardware/software configurations?     Yes     No

### Office/Admin

Which office/administrative computer applications and services are available to, being used by, or needed by providers?

	Available?	Used Routinely?	Providers Want?
E-mail	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Internet	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
MS Office or other "office" software	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
ARMS	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
TAIMS	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
QMan	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Other (describe): _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Other (describe): _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

If applications are available but not used routinely, what are perceived or actual barriers to current use by providers:

- Computer equipment not easily available       Software is not user friendly  
 Computer equipment not adequate (too slow, timeouts, etc)     No time to learn new application  
 Lack of keyboard skills       Application not of value to user  
 Other (describe): \_\_\_\_\_

### Patient Care and Technology

Computer technology can be used in various ways to assist in providing patient care. Some examples include: reviewing charts electronically, adding or editing data, consulting medical resources to verify treatment or medication information, etc.

Do your providers currently use IT to provide patient care?     All       Most       Some       None



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Do your providers WANT to use IT to provide patient care?  All  Most  Some  None

Providers who want to or do use IT for patient care are most likely to use (check as many as apply):

- Before patient visit     During visit     After visit  
 Review existing data     Update patient data     Create new order (lab, Xray, pharmacy)

Which patient-related computer applications and services are available to, being used by, or needed by providers?

	Available?	Used Routinely?	Providers Want?
Internet access to medical on-line resources/research	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
RPMS clinical applications (roll and scroll)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Patient Chart GUI	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Quick clinical references (via PDAs)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Clinical desktop (e.g., CPRS or other electronic medical record application)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
QMan	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Other (describe): _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Other (describe): _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Are providers more interested in using IT  during patient care;  without the patient present, i.e., prior to or after a patient visit; or  both?

What are perceived or actual barriers to provider use *during* patient care (check all that apply):

- Software not available     No internet access  
 Computer equipment not easily available     Computer equipment not adequate (too slow, timeouts, etc)  
 No time to learn new application     Lack of keyboard skills  
 Slows down patient care     Exam rooms not big enough for computer equipment  
 Handheld technology not secure

If providers currently have internet access, are they using any medical on-line resources (e.g., Cochrane, WebMD, etc.):  Yes  No

If yes, which resources are primarily used?

- UpToDate     Micromedix     Lonesome Doc     Cochrane  
 Other (describe): \_\_\_\_\_

If some providers *currently* use PDAs (personal digital assistants), what *types* of applications are they using?

- Pharmacy-related (drug interaction lookups, etc) (specify): \_\_\_\_\_  
 General medical reference (specify): \_\_\_\_\_  
 Billing/coding related (specify): \_\_\_\_\_  
 General office applications (e-mail, phone messages, calendar etc.) (specify): \_\_\_\_\_

## Equipment Location and Needs

IT equipment needs are becoming a larger percentage of a clinic's budget, and can be difficult to predict. Answering the following questions should assist sites in planning near term equipment needs.



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Availability of adequate equipment is critical for all users. A key barrier to provider use of technology is location and associate ease of use, i.e., are computers located in or near provider offices, triage stations, and/or exam rooms; are computers and networks fast enough; is the application intuitive, etc.

To reach a preliminary estimate of types and amounts of IT equipment that should be planned for, consider the following questions:

Use for point of care (during patient visit)?

Which location(s)

Exam room? Is there room for workstation? For printer?

Near exam room? Is there room for workstation? For printer? Security considerations?

At triage station? Is there room for workstation? For printer? Security considerations?

Technology considerations

Workstation for each location a patient may be?

Or tablet or laptop for each provider? Pros and cons: portability vs. security

Internet access for workstations?

Printer for each workstation? Shared printers in common areas?

Use for other patient data (review and/or update prior to and after visit)

Which location(s)

Provider office? On desk? Printer in office? Shared printer near office?

If group office, workstation for each provider? Or shared workstation? Printer(s)?

Near exam room or other provider common area? Is there room for workstation? For printer?

At triage station? Is there room for workstation? For printer? Security considerations?

Technology considerations (see above)

