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Assisting Office-Based Clinicians with Health Information Technology



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Needs Assessment

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Needs Assessment 101

Step 1: Gap Analysis

Gap analysis is determining the differences between the current state and the desired state. To accomplish this, the current state must be measured. Some metrics to consider include:

- Staff and colleague computer skill level
- Volume of patient visits
- Time and resources to perform repetitive tasks
 - Prescription refills
 - Chart pulls
 - Annual exams
 - Acute visits
 - Bill an encounter
- Distribution of level of service billing
- Percentage of needed preventive services performed

The tools to acquire these metrics are numerous, including surveys, observations, focus groups, and analysis of historical data.

Once you have the metrics for the current state, determine how those metrics would look in the desired state.

Step 2: Identify Barriers

Now with an understanding of the current and desired states, determine what barriers are maintaining the current state. Potential barriers may include:

- Financing (lack of capital, budget constraint, etc.)
- Lack of personnel
- Lack of particular skills
- Lack of knowledge of the implementation process
- Inadequate information technology (IT) support
- Other conflicting improvement processes

Step 3: Identify Priorities

The complete desired state is probably not achievable in the initial attempt. Place a priority on each item in the desired state. To help you assign these levels remember the goals of your project and identify any dependencies in your list. Even an easy priority schema, such as "low," "medium," or "high" can help you map out the chronological list of features and functions to be implemented.

Step 4: Summarize Results

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Based on the gap analysis, you have identified the resources required to achieve the desired state. Identifying barriers uncovers the issues that are blocking those required resources. Setting priorities provides a systematic framework to attack those barriers. By documenting this process, it becomes a tool to help set expectation during the transition and can be referred to during the implementation process. Of course, as needs change so should this documentation.

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