**Setting and Achieving EHR Goals to Position Your Organization for Success**

The purpose of this worksheet is to help you define your goals for improving your EHR system so that your healthcare organization can more efficiently gather the data you need to be better positioned to receive Medicare and Medicaid EHR incentive payments, while avoiding possible penalties.

To get started, here are some goals you might consider setting:

* Improve data collection processes to ensure patient data is captured appropriately and accurately.
* Use the EHR data to create reports and take action.
* Bring in the data reports, and take action on them.
* Ensure your healthcare organization is prepared for an audit so you can keep the incentives you’ve worked hard to get.
* Get – and keep – your documentation in order.
* Place a strong focus on analyzing and addressing security risks in patient data.

Once you’ve taken some time to set goals that will enable you to improve your ability to receive Medicare and Medicaid incentive payments based upon compliance with meaningful use requirements, get to work achieving your goals, and measuring your success.

**Five Steps for Setting, Achieving and Measuring Goals**

It’s time to set goals! Here are five steps you should take to effectively set, achieve and measure your EHR goals:

1. **Write down your stated goals and place them where you can see them every day.** Too often, goals are abandoned. Writing down your goals makes them more meaningful, Failure to write down your goals often means you will forget them or won't focus on them. So, write down your goals, and then make it part of your day to review your goals and take action. This keeps your goals alive and top of mind.

1. **Define each goal by using the SMART goals method.** Clearly defining each goal is the first step in making your goals a reality. So, each and every goal should be SMART:

S – Specific (or Significant)

M – Measurable (or Meaningful)

A – Attainable (or Action-Oriented)

R – Relevant (or Rewarding)

T – Time-bound (or Trackable)

1. **Commit to each and every goal.** This might sound obvious, but when goals are taken too lightly they are rarely achieved. To foster commitment to your goals, answer the following questions for each and every goal.

* Why are you committing to this goal?
* How you are committing to this goal?
* Why is this goal important to your organization?
* What will achieving this goal mean for your organization?
* Why is the outcome necessary?
* What are you going to do to make it happen?

1. **Create an action plan for achieving each goal.** By writing your goals down, defining and committing to them, you will have the clarity required to develop a list of actionable steps. Even though you may not know all the steps you need to take right now, start by writing down some steps that will take you in the direction of goal achievement. Simply start by asking, “What specific steps do we need to take to achieve this goal?” Challenge yourself to come up with five action steps for each goal you’ve set for the organization.
2. **Measure your progress toward goal achievement.** When you measure your progress, you stay on track, reach your target dates, and stay motivated to continue exerting the effort required to achieve your goal. Answer the following questions to determine how to best measure the success of your action plan:
   * How will I know when we have accomplished this goal?
   * What are some concrete criteria we can set to prove the goal has been achieved?
   * How will we quantify improvement?

Now, it’s your turn. Use the worksheet on the following pages to set, achieve and measure your goals.

**Goal Setting Worksheet**

|  |  |  |
| --- | --- | --- |
| **State Your Goal** | **Clearly state your goal in the space provided below:** | |
|  | |
| **Define Your Goal** | **Define your goal by using the SMART goals method in the spaces below:** | |
| S – Specific (or Significant) |  |
| M – Measurable (or Meaningful) |  |
| A – Attainable (or Action-Oriented) |  |
| R – Relevant (or Rewarding) |  |
| T – Time-bound (or Trackable) |  |
| **Commit to Your Goal** | **Answer the following questions to foster commitment to your goal:** | |
| Why are you committing to this goal? |  |
| How are you committing to this goal? |  |
| Why is this goal important to your organization? |  |
| What will achieving this goal mean for your organization? |  |
| Why is the outcome necessary? |  |
| What are you going to do to make it happen? |  |
| **Create an Action Plan for Achieving Your Goal** | **What are five specific steps you need to take to achieve this goal?** | |
| Step 1: |  |
| Step 2: |  |
| Step 3: |  |
| Step 4: |  |
| Step 5: |  |
| **Measure Your Progress** | **Answer the following questions to determine how to best measure the success of your action plan:** | |
| How will I know when we have accomplished this goal? |  |
| What are some concrete criteria we can set to prove the goal has been achieved? |  |
| How will we quantify improvement? |  |