EHR SOFTWARE **RFP GUIDE**

The ultimate guide to developing an RFP document for your EHR project

GUIDE HIGHLIGHTS

- Cheat-sheet showing the ideal structure of an EHR RFP
- How to compile and prioritize practice requirements
- Advice on response evaluation, selection criteria and more

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AN INTRODUCTION TO EHR RFP DOCUMENTS

When selecting EHR software for your practice, you need to evaluate the quality, cost, benefits and limitations of shortlisted EHR vendors. In order to do this systematically, you should create an EHR request for proposal (RFP) document.

An RFP is a formal document asking vendors to submit detailed information as to how their software meets your practice requirements. This allows you to differentiate between shortlisted software products and determine which will help you quality of care, , documentation and billing, while providing a cost effective option.

ANALYZING A SHORTLIST

Within an EHR RFP, you will outline your requirements in detail to give vendors the context they need to discuss their services and how much they cost. Your RFP must clearly outline the goals, specialties, and clinical specifications of your practice and must include a priority system for these requirements. If vendors have clear information about your practice needs, then they will be able to describe their features in the context of your practice.

The main reason for producing an RFP is to strategically analyze your shortlisted vendors. The process of implementing an EHR system is time consuming and costly. For this reason, it is essential that you have a thorough understanding of exactly what you are looking for. Imagine designing your own EHR system. What would you include for your practice? What type of customer support and training would you need? What timeframe would you expect for implementation? What billing regulations and codes do you need to follow? These priorities will set the template for your RFP.

A PRECURSOR TO CONTRACTS

Your practice should have developed an EHR selection committee that includes key stakeholders, managers and clinical staff. This team will give you input on your RFP from all facets of your practice.

It is also important to note that the creation of your RFP will likely need input from your practice's legal team as it is often a precursor to the EHR contract. For this reason, it is important to accurately outline necessary timelines, goals, objectives and clinic needs, including training, staff support and IT requirements.

On a larger scale, the creation of an RFP document will provide internal insight on the requirements of your practice, both immediately and in the long term. ou will then have an outline from which to evaluate vendor proposals. Long-term, you will have identified successful and poorly-run processes within the practice and hopefully set goals for improvement.

OUTLINING YOUR PRACTICE PROCESSES

The process of identifying and outlining your practice processes and business needs is an essential step in creating your RFP document. You need to clearly delineate your practice to potential vendors so that they can provide a meaningful proposal.

ENSURE YOUR SELECTION TEAM IS REPRESENTATIVE OF THE PRACTICE

Your EHR selection committee will be comprised of key stakeholders from all facets of the practice. You should have representation from the clinical staff members and the support staff of reception, billing and operations. Board members, owners, and management teams will delineate administrative concerns such as costs, training and timelines. In addition, you should include a representative from your legal team, accounting and purchasing as well as compliance and security departments.

"The more specific you can be in conveying your practice needs, the more satisfied you will be with your vendor proposals."

SEEK THE KNOWLEDGE OF POTENTIAL EHR USERS

Note which personnel will need to use the EHR system, who needs access, what are the billing processes and who is the patient population? What IT systems are already in place, what legal and insurance guidelines are need, and what administrative/productivity measures does the practice monitor? These types of practice specifications must be clear to the EHR section committee, so they can be conveyed to potential vendors in your RFP.

KNOW YOUR PRACTICE WORKFLOWS

Because so many facets of the business will be affected by implementation of a new EHR system, it is important that the entire team have a clear understanding of the current systems and workflows. For example, if it is critical to have patient education handouts (which will likely add to the cost of the system), administrative management will need to know their purpose and the role it has on patient outcomes. This way, increased costs are justified to practice members that are not clinical practitioners.

PRESENT THE BASICS

The selection team will also obtain basic practice information that the vendors will need to know, including: facility size, current technology and equipment on-site, project timelines and contact information.

Much of the information you gather regarding practice processes and business specifications will be conveyed in the 'practice overview' section of the RFP. You will share information about the specifics of your practice, so that the vendors will be able to tailor the responses to your practice.

The 'practice overview' section must be specific. A vendor would likely offer different services to an extended care rehabilitation facility as opposed to a concierge medicine physician. The more specific you can be in conveying your practice needs, the more satisfied you will be with your vendor proposals.

PRACTICE REQUIREMENTS

Once your selection committee has analyzed your practice workflows and developed a clear picture of how your business operates, you will be able to create a checklist of requirements for your new EHR. This list of necessary features and services will be basis of your RFP document.

THE WHY, WHO AND WHAT

Your selection committee will identify and organize the priorities and technical requirements for your new EHR system. As part of this process, the practice should consider data conversion requirements for existing systems (or even from paper charting), modifications to current software and coding requirements (such as ICD-10 codes and reporting functional improvement), as well as user training. Ask your clinical staff what they feel is missing from your current EHR system. Their top priorities and technical practice requirements will be the most important items outlined in your EHR RFP.

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Your RFP can include optional services and functionality, but these need to be clearly defined to encourage vendors to focus their responses on key requirements.

To focus your efforts during RFP production, start by answering these simple questions:

Why? Why is your organization looking to change EHR system? (Think: what is wrong with the current system, and what is needed in the new system?)

Who? Describe your practice specialties, and who it treats. Describe the patient population, facility size and professionals you employ. How does this user base expect to use the new EHR?

What? What are the practice requirements for the new EHR system? Examples will include: scheduling, daily notes, billing, functional coding, patient portal, automated appointment reminders, 24 hour customer support, remote access to charting, etc.

PRIORITIZING PRACTICE REQUIREMENTS

Determine your top 10-15 requirements and ensure that those items are discussed in depth in your RFP. Besides cost, the vendor responses to these requirements will be the most important to determine which system is best for your practice. By asking vendors to identify if/what/how they handle specific requirements in your RFP, you will find it easier to determine the suitability of each vendor for your practice.

When detailing your practice requirements, be sure to assign each one a quantitative priority score. At this junction you have a choice; including these priority scores in your RFP ensures a vendor addresses your key priorities in their response, however revealing these priorities at this stage can cause some vendors to exaggerate their ability to meet your needs just to “stay in the game”.

It is also important to categorize each requirement into functional groups, including patient care, billing, training, customer support and user access. This will allow you to identify which processes are being catered for by each vendor. A well-organized list of practice requirements will also provide a structured way of evaluating your EHR RFP responses. If you determine that one vendor is able to meet all of your needs for billing and user access, but doesn’t adequately meet your needs for patient care, then you will likely determine that the system is not a good fit.

FINANCIAL EXPECTATIONS

Having outlined your practice processes and requirements, you must also communicate financial expectations in your EHR RFP. These expectations must be clear to both the EHR vendor and practice administrators.

When seeking out proposals for your EHR selection project, it is important to consider funding along the way. It is easy to think that until the system is up and running, the process should not cost the practice anything besides time. However, this is not the case. Just as your practice will dedicate many hours to the process of selecting and analyzing EHR systems, your vendor will also commit many hours to your practice, once selected. Even before being chosen, the vendor will commit time to analyzing your RFP, creating a proposal for your company, and then in providing a software demonstration to your team.

MINIMIZING RISK

Outlining financial expectations is important in order to minimize selection risk for your practice. In addition, this section of your RFP will minimize risk for the vendor. The right vendor will commit many hours to demonstrate, train, evaluate and support onboarding of the new system. Because of the high level of support required, it is important both parties understand the levels of compensation expected during this intense period of training. If this is clearly outlined, then both parties can focus on implementation without any financial conflicts.

"A clear financial target plan within your EHR RFP will help reduce financial surprises for both your practice and your EHR vendor."

In response to your RFP, vendors should outline when they expect to be paid during each stage of implementation as well as during ongoing use of the EHR system. Having financial targets (including EHR incentive targets) brings clarity to all parties. Your practice will need to know if there are any additional charges for customer support, or if there is a limit to clinician support and training. Your practice will also need a clear indication of the timeline of payment, as there will be a high amount of outgoing funds during a time when incoming resources may be limited due to a change in documentation/billing systems.

FINANCIAL TARGET PLANNING

You should have a general indication of your expectations for service, onboarding, training and implementation, but you must also list all terms of payment for satisfactory performance to ensure meaningful use is achieved. Create an evaluation tool to determine if your vendor has met your required expectations. Be clear with your expectations and share them with your vendor. Outline red flags for inadequate performance or non-compliance to the outlined contract.

A clear financial plan within your RFP will help reduce financial surprises for both your practice and your EHR vendor. Most importantly, your practice will be able to better prepare their budget and allocate funding to handle the transition to the new EHR system.

VENDOR EXPECTATIONS

In order to get the most accurate responses to your RFP from prospective vendors, you must give them clear direction on the content and format of their response. The entire RFP document should be organized in an easy-to-follow format and you should be clear and concise in your stating your needs.

The value in an RFP begins to develop when you go into detail about your requirements, and in doing so, create differentials between your vendors of choice.

Part of this is covered through providing them with a thorough and clear understanding of your practice. Your introductory section should have outlined who you are as a practice, what you require from your EHR and why you are seeking a new EHR system. A rural pediatric clinic has different requirements than an immediate care setting in an urban area. Let the vendors know who they are delivering a proposal to.

CREATING DIFFERENTIALS

Failing to outline your EHR requirements in detail can be a fatal mistake for any RFP. It is likely that all vendors will meet your basic needs, especially if they are closely aligned with Meaningful Use requirements. If you stick to broad stroke requirements, you will likely receive the same proposal from all vendors. The value in an EHR RFP begins to develop when you go into detail about your requirements, and in doing so, create differentials between your vendors of choice.

For example, when asking for information regarding the EHR's patient scheduling functionality, don't simply ask:

"Is patient scheduling provided?"

Instead, go for something along the lines of:

"Does patient scheduling provide automated patient reminders, remote scheduling, and patient access within the core EHR system?"

Clearly the second question is likely to elicit a more valuable response from your EHR vendors. Instruct vendors to follow a well defined response for each requirement; often this takes the form of multiple choice answers such as:

- Functionality provided out of the box
- Functionality provided at extra cost
- Functionality provided through integration with additional systems
- Functionality will be provided at time of implementation (in development)
- Functionality not provided

Specificity is essential in order to find a system that most accurately fits your needs.

THE SUBMISSION PROCESS

It is also important to provide the vendor with direction in regards to the submission process. If you would like them to provide a cover letter with their proposal, then include that in your instructions. Do not assume that vendors know exactly what you are looking for. You must provide contact information for questions on the process. Your contact should be a leader in your EHR selection committee and be willing to answer questions and provide clarity to vendors. You should also provide a clear schedule from your selection process including submission due dates and your internal decision dates.

Providing vendors with ample direction in your RFP will make the process of receiving and reviewing proposals much more efficient. It will reduce costs and wasted time during your EHR selection search.

EVALUATING VENDOR PROPOSALS

Once you receive your proposals from your selected vendors, your selection team will have the challenging but (ultimately) rewarding task of evaluation and selection. Below are a number of criteria that your selection team should use to evaluate the proposals you receive, with some advice on what to look for and why.

THE VENDOR

Your EHR vendor will become a partner in your clinical practice and will develop an ongoing professional relationship with your practice. Therefore, it is important to evaluate the operations and professionalism of the company alongside the technicalities of their EHR system.

When you receive your proposals, make a note of the timeliness and completeness of the proposal. The vendor's proposal is their first chance to make an impression on your practice. It should be well organized, include all requested information and submitted within your requested timeframe. These components are excellent indicators of the company's professionalism and support levels. You want a vendor that is timely and respects your needs.

PRACTICE REQUIREMENTS

Next, take your top 10-15 priorities and analyze how closely each one meets your needs. Choose a simple but effective system to grade the extent to which each requirement is satisfied. A visual color system, as easy as red, yellow and green works well. Give a red mark to points that do not satisfy your needs, yellow to points that are okay but not exactly what you want and green to points that meet your needs completely. If you mark your proposal documents in this manner, you will have an immediate visual indication of which one suits your practice needs.

COST

Cost is very important, so if you find a proposal that is completely out of your budget range, remove it from your list. Remember that there is typically some negotiation room when it comes to costs, but avoid approaching this as a cost-cutting exercise. A quality EHR system is highly valuable to your practice - expect to pay for this quality.

TRAINING AND IMPLEMENTATION

Analyze timeliness for training and implementation. You will need a vendor that can provide ongoing staff training for regular intervals for several months. The vendor should also have readily available customer service support via phone or online support. Analyze their system hardware requirements and make a note of equipment you may need to purchase to implement the new system. Hopefully the systems run on standard computers and secure wireless internet.

THE NEXT STEPS

You may want to select 2-3 vendors from your RFP responses. It would not be wise to chose a vendor solely based on their proposal. You need to see the system in action. Invite your final shortlist for software demonstrations. Based on this, and many hours of analysis, your practice will be able to make a final decision for the best suited EHR system.

EHR RFP FRAMEWORK

A cheat-sheet to help you create a clear and concise RFP document.

Your EHR RFP should be divided into sections to make it easier for vendors to negotiate. To help you along with this crucial stage in your selection process we have compiled an EHR RFP cheat sheet.

Your RFP sections should include:

Introduction: The introduction will include information about your practice and business processes. This is the "About" section of your proposal. It is important that the vendor knows what type of practice they are submitting a proposal for.

Vendor Profile: Include a section for the vendor to share information about their company and their EHR product.

Requirements: In this section, you will delineate all the requirements you are looking for (with an area for Yes/No, Included/Not included etc. and narrative comments). This section will be the basis of your proposal evaluations.

Timelines: Include the timelines for submission, review and decision making.

Cost: The vendor will have an opportunity to provide narrative and financial information regarding their services for your practice.

Selection process: Include a brief summary of your intended selection process, as well as a contact person for questions.

Typically, the RFP is prepared as an outlined short answer response format with an adjoining checklist. This format allows the benefits of quick answer checklist with areas for further explanation. Part of the document includes a table provided with a column for the requested feature and adjoining columns with response options.

Because a checklist would not provide enough information for clarification, you should also use short answer questions. This offers the vendors an opportunity to explain each service in more detail and how it meets the needs of your practice.

Below is a cheat sheet for the structure of an EHR RFP document, including suggested items to be included:

INTRODUCTION

- Name of Practice:
- About Your Practice:
    - History, facility size, patient population, staffing, goals of EHR transition
    - Background information: present an overview of your organization and operations
    - Purpose of implementing new EHR system

VENDOR INFORMATION

- Contact person
    - Role and contact information, including email and phone
- Company profile:
    - Name, address, telephone number, website
    - Publicly traded? Private?
    - Main contact person, title, phone, email
    - Market analytics:
    - Years as EHR vendor, number of live sites, EHR retention rate
- Narrative section:
    - How does your company meet the needs of EHR clients including training/support
- Product specifications:
    - Product name, version, operations
    - Number of databases for scheduling, billing, documenting
    - Number of portals (patient, clinician, administrative, student etc.)
    - Access from third parties (insurance companies, billers, patient access)
- Modules:
    - List all modules
    - All included or add-on features?
    - Compatibility: Internet servers, Mac vs PC, PDF/paper copies
    - Confidentiality: what internal systems in place to ensure patient privacy

EHR REQUIREMENTS

Here are some examples of things your practice may include - a simple checklist with the option to add some narrative. Break this down into sections for easier analysis by the vendor.

- Reporting
    - Module to document:
    - Daily notes
    - Visit summaries
    - Progress notes
    - Patient follow up
    - Patient education
    - Billing integration
    - Ad hoc charting
    - Addendums
    - Standard reports
    - Productivity
- Training/Vendor support
    - Timeframe for product demonstration
    - Onsite implementation or remote training?
    - Number of hours committed to initial staff training
    - Ongoing client support available?
    - Additional cost for training after implementation
    - Customer support availability/ mode of contact
- Security and Data protection
    - How does the product meet all privacy and confidentiality requirements?
    - Ongoing security monitoring?
    - How is patient data secured?
    - How is clinician information secured?
    - E-signatures, electronic prescribing
- Technology and infrastructure requirements
    - Hardware
    - Software
    - Workstations
    - Networking requirements
- Patient care
    - Patient access
    - Patient education handouts
    - Electronic prescription availability
    - Patient scheduling reminders

TIMELINE

- Intent to respond due date:
- Written questions due:
- RFP responses due:
- Vendor of choice selection date:

COST

This should be a blank template asking the vendor to explain cost and fees for services/features

SELECTION PROCESS

Any inquiries: direct all questions to: contact name and email/phone, role and title

This framework should set you on the right footing towards creating your EHR RFP. Adapt it to match any specific practice requirements you have, and remember that the more information you provide regarding your EHR requirements, the more relevant responses you will receive.

This guide was written by Amy Vant, EHR in Practice Columnist, with contributions from Kathryn Beeson, EHR in Practice Editor

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