EHR SELECTION SURVIVAL GUIDE

Your seven-step guide to finding the best EHR for your practice

GUIDE HIGHLIGHTS

Compile your EHR requiremets and research suitable vendors

Construct your RFP using our customizable template

80-step checklist for a well-planned selecrion project

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GATHER YOUR EHR REQUIREMENTS

The process of selecting an EHR system is daunting.

Technology businesses are well aware of the required transition for most health practices to move from paper to electronic health record keeping. Because of this vendor awareness, the EHR market is ever-expanding, making the job of selecting the right EHR system even more challenging.

If users are unhappy with an EHR system, they will often point their fingers at the selection team. To save yourself this unnecessary headache, it is essential to establish a clear plan for the EHR selection process. That plan should always begin with a requirements gathering phase.

MAP OUT YOUR EHR PROJECT STAKEHOLDERS

Your key stakeholders for EHR requirements gathering include:

- Clinical staff members, for example:
    - Doctors
    - Nurses
    - Midwives
    - Therapists
    - Counsellors
    - Physiotherapists

- Support staff, for example:
    - Reception staff
    - Billing team
    - Operations team

- Insurance and accounting

- Board members and senior managers

All of your key stakeholder and user groups should be represented on your EHR selection team.

You should also include:

- **A project manager** (if you're reading this, that's likely to be you)

- **A C-level sponsor**, who will act as the voice of senior management throughout the project

- **An IT representative:** essential to ensure no-one overlooks your practice's technical requirements and limitations whilst being wowed by up-to-the-minute new features

Once you have built an EHR selection team representative of your practice makeup, you can direct your search in a focused manner. You should now begin to develop a prioritized list of EHR requirements which will allow you to eliminate systems that are less than qualified for your practice.

The process of building a well-balanced EHR selection team involves a lot of work, but if you don't take a considered approach, you may miss out on the key needs of your clinicians. A poor requirements gathering phase leads to money wasted on inadequate systems and the risk of losing excellent clinicians because of poor operations. In the end, patient care could suffer.

ESTABLISH YOUR 'WHAT', 'WHY' AND 'HOW' EHR REQUIREMENTS

Now that you've consulted with your key stakeholders and have their concerns are represented on your team, you're in a position to think strategically about what you - and your practice as a whole - hopes to achieve by selecting a new EHR

Before looking at any system in detail, it is essential that you delineate your EHR requirements. Before you undergo detailed requirements analysis for your practice, you should ask these key questions:

- Why are we using electronic health records?

- Who will be using the new system?

- Who will require access to this system?

- How will EHR serve our medical billing operations?

- What patient population are we documenting? (i.e.: pediatrics, geriatrics, outpatient vs. inpatient, hospital systems, specialty niche etc.)

- What hardware do I have in place?

- Will this hardware be able to support a modern EHR system, or will we have to replace certain hardware components?

- What compliance and insurance documentation requirements do we have?

- Do I need an EHR that also works as a management/productivity/reporting system?

In order to answer these questions, and to better understand what your practice needs, you must speak directly with the physicians who will be using the EHR system.

Do not rely on conferring with the heads of each department. Those in management may not have daily access to record keeping and patient care so it's essential that you discuss and deliberate with the direct users. One strategy for getting valuable input would be to create a brief but thorough survey to be completed by your practice staff.

PRIORITIZE YOUR EHR REQUIREMENTS

Having formed your EHR selection team and mapped out your basic requirements, you must begin to perform a detailed requirements analysis.

Unfortunately, unless you develop your own EHR system, it is unlikely there will be a single system that is perfectly suited and designed for your practice needs. You will need a well documented and thoughtfully prioritized set of requirements in order to identify the closest match possible.

YOUR NUMBER ONE PRIORITY: REGULATION

Whether your requirements analysis begun with billing management or mobile access, your number one priority must be meeting all regulatory (meaningful-use or compliance-based) and insurance guidelines within the EHR system.

You want to capture functional codes, exception codes and all other insurance codes within the encounter note so you are not left fixing problems after claims have been processed. **Your claims must be submitted accurately** to avoid audits and denials. You must also have a secure system that is HIPAA compliant and provides discharged patients with online access to their health information within 36 hours. **If these basic needs are not met, then your practice cannot operate.**

It is tempting to make your bottom line the number one priority. Too often large practices and institutions make decisions based on what is the least expensive. Try to avoid this temptation. Finances should, of course, be an important factor when prioritizing EHR software requirements, but don't use them as a driving force in selection decisions at the expense of your practice needs.

Unfortunately, this will likely rule out some of the cheaper EHR options on the market. But, you get what you pay for, so invest in a quality system and you will see a return through high user adoption and process improvements.

YOUR NUMBER TWO PRIORITY: MEETING THE NEEDS OF CLINICAL STAFF

Your clinical staff will be using the system during every patient encounter. If the clinical staff members are frustrated with the system, it will show in their job performance and patient care will suffer.

For example, your nurses may have requested a system that provides a simple workflow for taking blood pressure, gathering basic history, producing the patient report, and carrying out a medication review. Even if you provided three out of the four workflow process, your nurses will feel their contribution to the requirements gathering process has been ignored.

When your clinical staff feel their needs are being met, they will be more willing to buy into the new EHR system. As a bonus, you will have happier clinicians who will be more likely to give excellent patient care.

After prioritizing legal guidelines, clinician needs, and cost, you can then rank everything else that is important for your practice. You can determine if your practice needs a second language, marketing portals and other 'nice to haves', denoting their importance in a prioritized list.

CREATE YOUR VENDOR SHORTLIST

Once you have your practice requirements delineated and prioritized, you must begin to research and shortlist available vendors.

One of the best ways to gather vendor options is by turning to your fellow professionals. Your professional network offers a wealth of experience and knowledge regarding systems they have worked with in the past. As a professional courtesy, they should happily share their experiences with you. Professional networking sites like LinkedIn, offer an easy way to connect with fellow healthcare professionals.

It is also important to look to your professional association for insight. As an example, members of the American Physical Therapy Association can connect with other physical therapists in various settings and with various experience levels. Reach out for advice and insight. Ask specific questions related to your prioritized list of EHR requirements. Speak with past employers and former colleagues that have moved on to other practices. Ask what they are using and determine their level of satisfaction. Do not automatically discount an EHR vendor from one bad review, but know that personal experience is usually very valuable.

OBJECTIVE SEARCH STRATEGIES

Recommendations from colleagues are a great start, but it is necessary to include more objective search strategies. Try reaching out to insurance companies you work with regularly. Insurance representatives can provide insight as to which vendor they have had the most success with and will know what documentation system best meets the needs of their claims. You will also want to shortlist systems that works seamlessly with your payment source so you are not delaying reimbursement.

You may also consider using an EHR consultant to assist in the development of your shortlist. There are companies that work exclusively to improve the efficiency and profitability of medical practices. These consultants are knowledgeable about many EHR systems, and may be able to advise on the system best suited to your practice.

However, know that many of these companies charge a very steep rate to execute the difficult task of choosing an appropriate EHR vendor. In addition, they may require an ongoing royalty payment for future revenue. Be sure to define these financial obligations up front before committing. valuable data that can measure the efficacy of population-based health measures.

You will likely perform an online search for EHR. Be cautious here. Just because a vendor has invested heavily in marketing to ensure search prominence, does not make it the best system. Consider researching top EHR vendor survey results instead. Medscape, Black Book Market Research, and Medical Economics all publish independent survey results, ranking EHR vendors on a range of criteria. Most of this information is accessible online at no cost.

The above methods should provide you with enough information to able to finalize your EHR vendor shortlist. You can then move onto some direct research on the vendor's site before making direct contact and sending out RFPs.

SEND OUT RFPS TO SHORTLISTED VENDORS

Once you know what you require from your EHR system, you need to identify the vendor that can meet these needs. In addition, you need to be sure your vendor can give you what you want within a reasonable budget. A useful weapon in your EHR selection arsenal is an RFP (Request for Proposal) document.

PROVIDING CONTEXT FOR YOUR EHR PROPOSALS

An RFP is simply a document asking vendors to provide information you will need to make a decision when choosing an EHR system. You will outline your needs and vendors will provide you with information on their services as well as the cost of these services.

Your RFP must clearly outline the goals, specialties, and clinical specifications of your practice. You should also identify the top priorities for your new EHR system. Be sure to include a basic timeline you need for submitting the proposal, in addition to the timeline you will need services initiated in your practice. If the vendors have basic, clear information about your needs, then they will be able to better describe their features in the context of your practice.

HOW TO STRUCTURE YOUR RFP

In your RFP, request proposals are structured in a certain way, to allow you to easily compare. You need to be able to attain specific information (timeframe, cost, implementation, training etc) clearly. You do not want to be searching a document for this information.

Obviously, what goes in your RFP will depend on the requirements you mapped out before creating your RFP. However, the template below provides a good basic structure which you can customize to your needs:

Pitfalls in this typically stem from poor communication of what your practice needs. If you are not clear on your EHR requirements, a vendor will not be able to decipher your practice needs.

In addition, it is essential to provide realistic timeframes, as companies cannot put together a quality, custom proposal in only one day.

RFP section	What to include
Project purpose	In a nutshell: why you want a new EHR. Tie this to the fundamental needs of your practice, referencing your practice's background and specialty, your current EHR system and why you want to replace it
Baseline project limitations	Establish absolute timing and budgetary constraints. These limitations will help vendors get a sense of the scale of your project and whether they would be a good fit for you
Timeline	Lay out a timeframe for each of your selection and implementation steps up to system go live (When will you be scheduling demos? When are you looking to make a final selection decision? When do you aim to have your new system up and running?)
Requirements	Essentially the specific products and services the vendor should deliver. Give each requirement a separate section in your RFP and detail its priority. You can also specify whether you need this out of the box, or through customization/integration. Don't forget: these aren't just your feature requirements. Also include • Legal compliance features, including HIPAA and required functional coding abilities • Technical requirements, such as deployment method, integration requirements, mobile requirements • Support requirements -what sort of support package do you want? Is 24/7 phone support with a dedicated account manager essential, or would email support suffice?
Vendor implementation services	Ask the vendor to provide information on the implementation package they offer and projected costs. Ask for details of their implementation team, and their skills and experience.
Other vendor qualifications	Look outside the EHR and ask about what you want in a partner. This can include the uptime of their cloud services, or company culture requirements
Proposal evaluation criteria	Provide a deadline for responses and guidelines for RFP responses. A good way of ensuring that responses are uniform (and easy to evaluate) is by including a template for responses. Detail how you'll be evaluating responses and when you expect to reply to successful proposals
References	Ask for at least two references from practices similar to yours who have implemented the vendor's EHR system, including contact details so you can check up on them

A template structure for your EHR RFP

EVALUATE RESPONSES TO YOUR EHR RFP

When you receive vendor responses to your EHR RFP, you will have the challenging but ultimately rewarding task of evaluating your EHR vendor shortlist.

Whilst you go through your RFP responses, keep this one thing in mind: y**our EHR vendor will become a partner to your practice.**

It is easy to think of a vendor as an adversary or nuisance because of the high cost of their products. You will need to change your mindset and think of them as a partner. With the right EHR, you can deliver a higher standard of patient care, smooth out your billing workflows, and streamline practice operations. To realize these benefits, you need to ensure not only that your vendor can meet your requirements, but that you can establish a solid, mutually respectful working relationship with them.

ASSESS POTENTIAL VENDORS' COMPANY CULTURE

It is therefore very important to evaluate the company's operations and professionalism as well as the EHR system's technicalities.

When you receive the proposals, make a note of the timeliness and completeness of each. It may sound simple, but each EHR vendor proposal provides the first idea of how the software will fit with the context of your business. Each proposal should be well organized and submitted within your requested timeframe.

In addition, the proposals should address each of your EHR requirements. These components are excellent indicators of the company's professionalism and attention to detail. You want to hire a vendor that is timely and respects your needs.

ASSESS VENDORS' RESPONSE TO YOUR REQUIREMENTS

The next step in evaluating your EHR vendor shortlist is to cross-reference each proposal with the list of prioritized requirements you developed for your EHR system.

Focusing on your top three priorities, **analyze how closely each proposal meets your needs**.

Evaluating a system by grading the extent to which each requirement is satisfied. Keep it simple, and don't leave room for over-analysis. A grading system involving something as simple as a 3- or 5-point scale works well. Assign low scores to proposal sections that do not satisfy your needs and high scores to those that address your requirements accurately and extensively. This may sound like an oversimplification, but if you have accurately prioritized requirements during the previous steps, your evaluation process should be simple.

Of course, cost will be of great importance, so if you find a proposal that is completely out of your budget, you can easily remove it from your list. However, remember there is typically some room for negotiation when it comes to costs. You should also consider the fact that a quality EHR system is highly valuable to your practice, so expect to pay for this quality.

INVITE TOP VENDORS TO DEMO THEIR EHR

After you have identified the vendors that best match your needs, it is time to see the EHR systems in action. To do this, you will need to conduct software demonstrations with the vendor representatives. You will want to limit your software demonstrations to three to five vendors to avoid confusion and simplify your process.

Contact each vendor from the shortlist and set up a time for demonstration a week or two ahead of time so you can be organized and include your key stakeholders and selection committee in the process. Inform your vendor contact you are interested in seeing a software demonstration at your practice location. Give him or her a list of points you would like covered in your meeting so the sales representative can prepare accordingly.

THE IMPORTANCE OF CONTROL

To ensure demonstrations are beneficial and informative, it is important to stay in control of the process. Typically, the vendor representative will be a salesperson who will show you all the best features of their system. However, you need to find out how the system will work in your practice, not in the ideal world of a hypothetical practice. Since you already asked for specific topics to be covered when you set up the meeting, you should have a head start here.

During your product demonstration, be sure to have your key stakeholders present, including clinicians, operations management, and administration team members. Allow your clinicians to ask questions regarding the input/workflow/billing of a specific patient situation.

Create a "real-life" problem, and ask the representative to show you how it would be documented in the system. This will allow you to better analyze ease of use and functionality within the context of your clinic. Don't just ask, "How would I input a patient history?" Instead, ask the representative, "How would I input a past medical history, patient complaint, pain rating scale, vitals, and plan of care?" You will get a much more detailed indication of the completeness and efficiency of the system.

EVALUATING YOUR EHR VENDOR DEMOS

The process here is similar to the one you used to evaluate RFPs. Create a scorecard based on your clinic's top priorities. Rate each component for each vendor and include a section on your scorecard for miscellaneous notes. Pay attention to ease of use. If it seems like the representative is clicking his or her mouse far too often, the system may be cumbersome to use.

Avoid making the mistake of missing out on important feedback. You need input from your clinical staff because they will be using the system each day. Make sure you encourage them to ask real clinical questions and explore how clinical scenarios will be documented in the system.

Avoid letting the sales representative focus on all the wonderful assets of the system with an inspirational sales pitch. Be sure to take control of the meeting with respectful and direct questions. Keep your scorecards handy, and write down comments as you progress through the meeting. Don't wait until later to analyze the demonstration and system.

MAKE YOUR FINAL DECISION

Based on software demonstrations, proposals and many hours of analysis you should now be able to make a final decision on your perfect EHR system. It is never that simple though.

Know that no EHR system will give you everything you desire. When you find a great system that meets the needs of your practice, you will likely have an issue with the cost being higher than you hoped. Remember, you are looking for a system with a high value to your clinic. If your clinic can afford to pay for the system (even though it is not your cheapest option) and you feel it will add value to your practice, then it is likely the right choice, even if the finance department disagrees.

FINAL DECISION FACTORS

One of the factors that will affect your final purchase decision will be how well the clinical, operations, and administrative team members responded to the proposals and demonstrations. Foremost, you want your clinical staff members to feel they have their needs met. Give their opinions high merit, as the clinicians will be using the system day in and day out.

If you choose an EHR system based on user needs, you will have greater user buy in. Simple as that. Your clinical staff members will be pleased you met their needs and this sense of acknowledgement will spread throughout the practice.

Determine timelines for staff training. 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 internet conferencing. Analyze what technical equipment you have and what equipment you may need to purchase to institute the new system. Hopefully you chose a system with your hardware landscape in mind, but if not, ensure you identify where your current systems fall short.

THE EHR CONTRACT

When you have identified your preferred vendor and determined they can meet your clinical system and training needs, you will need to create a software contract.

Many vendors have their own software contracts pre-produced for adding new clients. If not, you may choose to create your own software contract with the help from your practice legal team.

Your contract document must include information regarding pricing and payment plans. You will likely pay an implementation cost upfront and then pay for continued use for each user on SaaS-basis unless you have opted for a perpetual license. Review the document and be sure to include specifics about your practice, including number of users, locations, and billing specifications. Have your lawyers review the document for completeness and to ensure all specifications are met.

Once the software contract is complete and finalized, you can look forward to the next phase of your EHR journey; the looming specter of implementation.

EHR SELECTION CHECKLIST

CREATE YOUR EHR SELECTION TEAM

- ◯ Identify key stakeholder groups
- ◯ Recruit representatives from each stakeholder group:
    - ◯ Doctors
    - ◯ Nurses
    - ◯ Therapists/counsellors
    - ◯ Physiotherapists
    - ◯ Admin team
    - ◯ Operations team
    - ◯ Billing team
    - ◯ Accountants
    - ◯ Insurance
    - ◯ Senior management
    - ◯ IT department
- ◯ Find a C-level sponsor for your EHR selection project
- ◯ Appoint a project manager
- ◯ (Optional): hire and onboard an EHR selection consultant

CONDUCT AN EHR REQUIREMENTS GATHERING EXERCISE

- ◯ Identify weaknesses of current system and how a new EHR would change things
- ◯ Identify key user groups
- ◯ Identify patient populations you need to document (e.g. pediatrics, geriatrics, outpatient inpatient, hospital systems, specialty niche)
- ◯ Survey current hardware and decide whether you need to replace it

○ Identify key requirements across all areas:

    ○ compliance and insurance documentation requirements (e.g. HIPAA, Meaningful Use)

    ○ feature requirements (e.g. lab integration, e-prescribing, patient portal)

    ○ whether you need any non-clinical features (e.g practice management, billing, reporting)

    ○ technical requirements (e.g. deployment method, mobile access, integration)

    ○ support requirements (e.g. phone support, email support, dedicated account manager)

○ Prioritize your requirements into 'essential', 'like-to-have' and 'bonus' categories

CREATE A VENDOR SHORTLIST

○ Conduct online research

    ○ Comparison tools and review sites

    ○ Vendor websites

    ○ Online networks (LinkedIn, Quora, user forums)

    ○ EHR software surveys (Medscape, Black Book Market Research, Medical Economics)

○ Mobilize your professional network

    ○ Reach out to former colleagues for recommendations

    ○ Reach out to members of your professional organization for recommendations

    ○ Ask current colleagues for recommendations from previous jobs

SEND OUT AN RFP TO SHORTLISTED VENDORS AND EVALUATE RESPONSES

○ Create your RFP document, including:

    ○ Project purpose (why you want a new EHR)

    ○ Baseline project limitations (cost limitations, timescale limitations)

    ○ A timeline for your selection project, from the RFP stage to system go-live

    ○ Sections for your key requirements:

        ○ Feature requirements

        ○ Technical requirements

        ○ Support requirements

        ○ Compliance requirements

- ◯ Request for implementation services information
- ◯ A deadline for responses
- ◯ Ask current colleagues for recommendations from previous jobs
- ◯ Proposal evaluation criteria
- ◯ Request for references
- ◯ Evaluate your RFP responses:
  - ◯ Disregard late or incomplete proposals
  - ◯ Agree on a scale for evaluating responses
  - ◯ Agree on a deadline for each selection team member to read and evaluate responses
  - ◯ Average out scores for each proposal
  - ◯ Invite to three to five best-performing vendors to software demo

CONDUCT AND EVALUATE EHR VENDOR DEMONSTRATIONS

- ◯ Establish how many people will be attending demos
  - ◯ Book suitably sized meeting room
  - ◯ Book suitable amount of inter-demo refreshments
  - ◯ Ensure attendees block time out of their regular work day - particularly important for clinical staff who might otherwise expected to be on call
- ◯ Ask vendors what hardware they need to conduct their demo (e.g computer, projector, tablet) and ensure it is available
- ◯ Send demo script to vendors to ensure all your key requirements are covered
- ◯ Create example scenarios to run through during presentation
- ◯ Agree on a scale and method for evaluating vendor demos, and the criteria used to make a final selection decision
- ◯ Create scorecards for each demo and ensure all attendees complete during each demo
- ◯ Attend and score each vendor demo
- ◯ Average out scores to identify top-performing systems

MAKE YOUR FINAL SELECTION DECISION

- ◯ Gather your selection team to discuss pros and cons of each system
- ◯ Make your decision
- ◯ Identify a 'second choice' in case contract negotiations fall through
- ◯ Reach out to preferred vendor regarding contract negotiations
- ◯ Consult your practice's legal team for help drawing up contract
- ◯ Draw up and negotiate your contract, including clear details on
    - ◯ Pricing and payment plans
    - ◯ Implementation fees
    - ◯ Number of users
    - ◯ Locations
    - ◯ Billing specifications
- ◯ Proof-read final draft of contract and sign off with practice's legal team before proceeding further
- ◯ Sign contract
- ◯ Begin preparations for EHR implementation

This guide was written by Jeff Green & Amy Vant, EHR in Practice columnists, with contributions from Kathryn Beeson, EHR in Practice Editor

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