MASTERING EHR DEMOS IN 4 EASY STEPS

Your comprehensive resource for planning and evaluating EHR demos

GUIDE HIGHLIGHTS

- A template agenda for your EHR vendor demo
- Building a team to assess your system demos
- Evaluating the pros and cons of your EHR demos

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1. PREPARE METICULOUSLY FOR EACH DEMO

Getting to see a live tutorial of how an EHR system operates is one of the best ways to evaluate whether the system will work in your medical practice. In order to make the most of this opportunity, it is important to create a plan for the visit. Here are the most critical steps in planning for your vendor demo.

IDENTIFY AND INCLUDE KEY PERSONNEL

The vendor demo should be presented to the entire EHR selection committee. This way, the system will be evaluated from many points of view, including clinical, administrative, and operational perspectives.

It is important to schedule the presentation and give ample notice to all important staff members so that they can plan accordingly. It may also be beneficial to include two to three additional clinical employees in the demonstration. They will bring a clinical and unbiased perspective, as they would not have been a part of the initial evaluations of all other vendors.

IDENTIFY THE FEATURES YOU WOULD LIKE TO SEE IN ACTION

It is important to identify key features that you want the vendor to demonstrate. These features should come from the list of requirements that you and your selection team drew up at the start of your EHR selection journey.

For example, if your practice is having difficulty with patient scheduling and communication, be sure to list the scheduling portal and patient portal as features you the vendor to demonstrate. If your practice loses efficiency by using paper prescribing, be sure to include the E-prescribing feature as part of the needed items during the demonstration. The list of key features should be sent to the vendor, so they can plan accordingly for the demonstration.

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ENSURE ADEQUATE ACCESS AND EQUIPMENT

This might seem obvious, but if the vendor is going to present their system to 15 people, be sure that your meeting room can accommodate the size of the group. Additionally, ensure that each person has a computer with access to the system. The vendor should have a way of allowing access to their system without using any real patient or clinical information. This will allow the users to "feel" what it is like to use the system, evaluating the usability and operation.

CREATE AN EVALUATIVE CHECKLIST/ASSESSMENT

You must have a systematic means of evaluating the proposed EHR system after the demo. For this reason, you should create an assessment that each person will use to evaluate the system. You may choose to break down each category by topic such as usability, scheduling, encounter note, prescribing, patient communication and billing.

Once each topic is identified, something as simple as a one to five scale, or red, yellow, or green dots, can be used to quickly assess whether the system exceeds your expectations, meets your expectations or does not meet your expectations. Most likely you will also add a section for general comments. This assessment should be given to all evaluating personnel during the demonstration, so they can give feedback in real time.

2. INCLUDE REPRESENTATIVES FROM ACROSS THE PRACTICE

EHR demos are a great opportunity for representatives across the practice to see how a system might truly fit into their workflows and improve patient care and operations. Therefore it is critical to have representatives from all key stakeholder groups sit in on vendor presentations to ensure that all major requirements from across the practice are addressed.

Important employees to include in the EHR demo and evaluation process include:

CLINICIANS

Depending on the type of practice, you should include several different clinicians. If your practice has physicians, nurses, and therapists, then plan to include one employee from each discipline. During the EHR demo, a clinician will provide the most useful analysis and feedback regarding the practicality of using the proposed system in your practice. These employees are the ones who must translate patient encounters into documented and billable notes so allowing clinicians to see a demonstration of hands-on use is essential. They will also be able to analyze efficiency, ease of use and practicality in patient treatment.

CLINICAL DIRECTOR

A clinician with a supervisory role should be included in the evaluation team. This employee will look at the operational role of the EHR. They will be able to evaluate whether the system will help improve efficiency and productivity of the clinicians and practice as a whole.

FRONT OFFICE STAFF

The front office staff plays a critical role in the use of a new system. During an EHR demo, they should evaluate the ease of use for inputting patient demographics and insurance information, as well as the scheduling portal. The front office plays a key role in how smoothly the practice operates and first impressions at patient encounters. A quality EHR system will help to streamline these tasks.

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IT DEPARTMENT

An employee from the IT department should be included in the EHR demonstration to determine the hardware and network requirements of the proposed vendors. The IT department can also analyze the security of each EHR system to ensure patient privacy. The IT department will help determine the cost for integration of the system and establishment of workstations.

ADMINISTRATIVE STAFF

An administrative personnel should be included to analyze the cost of implementation and integration of a proposed system. Additionally, they will be able to analyze how productivity and operational tasks can be improved during the demonstration.

BILLING DEPARTMENT

The practice cannot sustain itself without reimbursement. Therefore, streamlined billing processes are critical for billing operations. An employee in the accounts receivable department should evaluate the process for sending claims and processing payments.

3. FIND THE PERFECT BALANCE OF DIRECTION AND AUTONOMY

During a demo, the selection committee will have an opportunity to assess the quality of the EHR system and determine whether or not it will fit the needs of the medical practice. You should have already outlined what you expect to gain from the demonstration. This will typically include items from your "problem list" and requirements to be met by the new system.

DIRECTION AND AUTONOMY

Consider sending the vendor a list of features or modules that you wish to see or have presented. The vendor will be then able to ensure your requirements are addressed during the time constraints of the presentation.

You may be tempted to have them follow a pre-designated script. If you decide to go down this route you should also leave some room for them to show you the features which differentiate product. If the vendor does not have some autonomy during the demonstration, you will risk missing out on additional features that you are unaware of.

QUESTIONS IN CONTEXT

An EHR demonstration is an opportunity to ask the vendor questions that are specific to your practice and would not be shared in general system information. Some specific questions might include:

- How does the mobile portal differ from the office portal?
- Which features of the patient portal improve communication with patients?
- How does the system increase compliance with prescriptions and keeping appointments?
- How does the system track and monitor productivity? Patient outcomes?
- How is Meaningful Use reported?
- What is the interoperability of this system?
- How does a clinician access past medical records and share data with other specialties?
- Is there tracking for orders received and processed?

You and your demo team should be visualizing how this system might fit into your practice. Imagine sitting down with a patient and a computer station with this system in front of you. How would the interaction go? Would you feel comfortable inputting necessary clinical information, while still maintaining good patient rapport? Is the system inherently usable? If not, do you think that the system will cause unnecessary strain on timeliness of documentation?

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You might want to draw up one or two 'dummy' scenarios for vendors to run through so that you can see how the software would cope with situations your practice faces on a day-to-day basis.

OBJECTIVE MEASUREMENT

If time allows, you may consider having a clinician sit through a patient encounter on the demo system and input the data that might be taken during a patient encounter. This will allow for a hands-on evaluation of the system and how it would be used in a patient visit.

The selection committee should have an evaluation form to be filled out during the EHR demo or shortly after completion. The same assessment should be used for all vendor demonstrations for an objective measure of the quality of the systems as they relate to the medical practice.

4. IDENTIFY YOUR EVALUATION STRATEGY AND STICK TO IT

EHR demos offer a unique opportunity to see how a system may benefit a medical practice. Therefore it is important to accurately and thoroughly evaluate the demonstration in order for a practice to find software that best fits its requirements. Here are some strategies and best practices for evaluating your EHR demos:

CONSIDER WHETHER EACH EHR MEETS YOUR KEY OPERATIONAL GOAL

Your practice should establish key goals for implementation of a new EHR system. This list of key goals should be included in the assessment tool. Key goals may include: increased operational efficiency, reduced documentation time for clinicians, improved billing operations, and improved patient scheduling. The key goals will be unique to each practice. These key goals are most likely the reasons why the practice is looking for a new or updated EHR system in the first place. These should be outlined in the evaluation tool.

EVALUATE YOUR ‘MUST-HAVE’ REQUIREMENTS

What are the must-have features for your practice? These should be clearly outlined and included in the assessment. These components differ from your key goals, as they are clear requirements of the system, not overarching goals. For example, a practice may include electronic prescribing as a ‘must-have’ for their system. Other components may include patient portal access to medical information or automated scheduling reminders. Determine your ‘must have’ list ahead of the EHR demo phase and include all of these components in your evaluation form.

A simple ‘yes or no’ checkmark box on your demo scorecard is a good starting point for easily measuring whether the system meets each requirement. You can take this up a notch by rating how well a system meets your must-have requirements on a scale of one to five, or by using a ‘red, amber, green’ approach. The system with the highest score for each rating, or with the highest number of green dots, is the one that meets those needs best.

DISCUSS EACH EHR'S UX

Include an evaluation of the operations and navigation of the EHR system as showcased in the demo. It should be inherently easy to use and navigate. Additionally, the system should follow a workflow that is consistent with a patient encounter. Include an analysis of equipment needs or upgrades. Does the 'feel' of the system seem simple to use or is it a hassle? If the vendor demonstration seems confusing or arduous, then it will likely feel that way during a patient encounter.

"The system should follow a workflow that is consistent with a patient encounter. "

EVALUATE ANY BONUS FEATURES

Include an evaluation of features that are not an absolute requirement, but would be nice to have. This might include access to patient education handouts, or patient-directed scheduling. The vendor may include additional features in their EHR demo that the practice did not think of. Remember to focus on the must-have list, but be open to added features that may improve operations or clinician satisfaction. Determine if these features are included in the system or if they come at an additional cost.

A TEMPLATE AGENDA FOR YOUR VENDOR DEMOS

The following is a general use EHR demo template. It won't be a perfect fit for your practice - you'll need to substitute your own requirements in to make it work for you. Nevertheless, this template serves as a good starting point from which to build a demo itinerary that suits your needs.

SYSTEM SPECIFICATION

1. System overview – log in, menus, switching between processes and modules.

2. User experience – interface, screen, customization needs and options, search facilities.

3. Core functions – charting, e-prescriptions, lab integration, scheduling, billing etc. Not all of these may apply, depending on your key requirements.

4. Patient portal – what does this give patients access to? How easily-accessible is it for older patients who are less tech-savvy?

5. Mobile functionality - native app or browser based? Which operating systems is it compatible with? Does the mobile version of the software have the same functionality as the desktop version?

6. Analytics – be clear on what reports and metrics you must have, would like to have, and then ask what else it can do.

7. Interoperability – how good is the system at 'talking to' other health IT solutions? How will this impact on your ability to provide high-quality continuous care?

BROADER ISSUES

8. Data security and HIPAA compliance – protection from both external and internal threats; disaster recovery. If it's a cloud system, make sure you understand where your patient data is being stored.

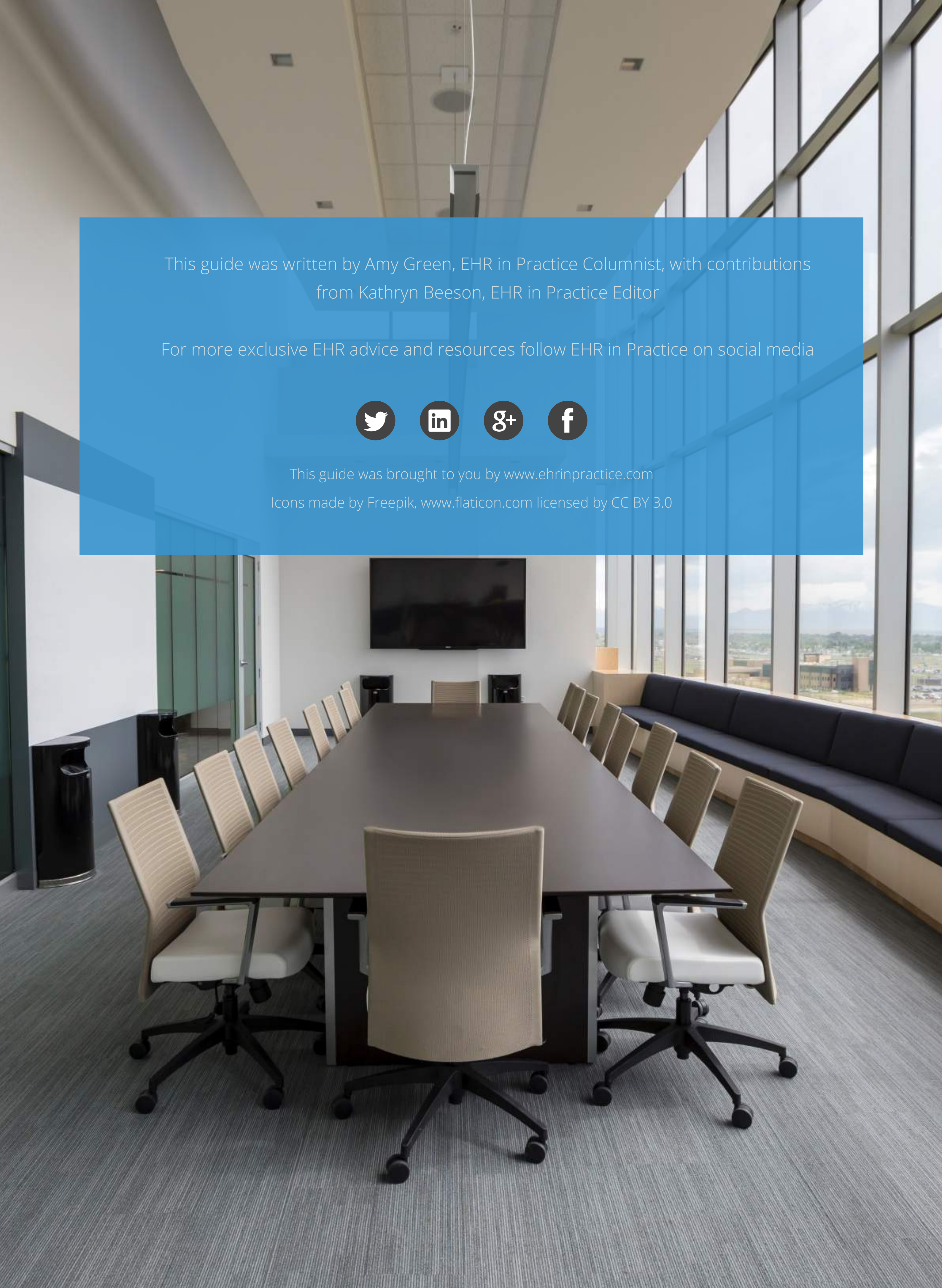
9. Meaningful Use – ensure that the software meets requirements for Meaningful Use if you want to attest to the CMS's EHR incentive programs.

10. Implementation timescales – determine when (realistically) the system could be installed and fully functional. Cloud EHRs can typically be implemented faster than on-premise solutions.

11. Pricing model – is the system licensed or on a subscription basis? Are maintenance and update/upgrade/support costs included? How does the vendor's price compare to the total cost of ownership (TCO) including the following, often hidden, costs:

- Installation
- Upgrades
- System maintenance and support costs - IT costs specifically related to maintaining the system
- Direct labor costs - staff necessary to support the system
- Direct non-labor costs – consultants, vendor fees and facilities, and any related overheads

12. Vendor stability – check the vendor's viability as a long-term supplier: how long have they been in business? How many clients do they have? How do their recent financial reports look? Ask for testimonials from your specialty or sector - reluctance to provide these should be a significant red flag.



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