

# Selecting An EHR, Now What????

## **National Association of Rural Health Clinics**

### **Technical Assistance Call**

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# You've Decided to Take the Plunge

- Allow adequate time; this decision will impact your practice for years to come
- Develop a plan
  - Your plan should be logical and systematic
  - The typical timeline for system implementation is 12-24 months depending on the size of your practice and whether it is a single or multi-specialty
  - Use available resources ( don't reinvent the wheel )
  - Stay focused

# The Plan

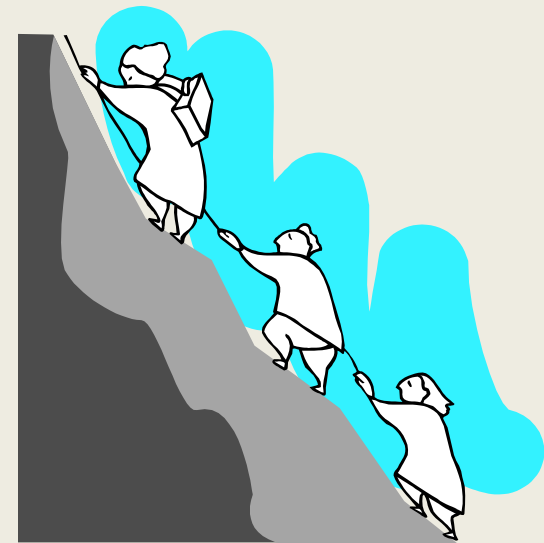
- Identify your decision makers
  - The size of your practice will influence committee mix
  - Make sure you have a strong “physician champion”
  - Identify an EHR selection project manager
  - Make sure committee members come from all areas i.e. reception, clinical, management, etc.
  - Lay down the ground rules
  - Allocate time out of the schedule for committee meetings

# Set Goals

- What would you like your technology to accomplish? Develop a checklist
  - Time lost playing the “lost chart race”
  - Lab tracking system
  - Coding enhancement
  - Medication management capabilities
  - Quality improvement systems for chronic disease management
  - Patient information libraries
  - Patient e-mail or web access capabilities (pt. portals)

# Set Goals

- Map your workflow
  - Scheduling
  - Triageing
  - Patient registration
  - Referral management
  - Patient encounter documentation
  - Orders
  - Results management
  - Protocols
  - Treatment plans
  - Clinical decision support
  - Co-payment capture
  - Claims processing
  - Check out process
  - Medication management

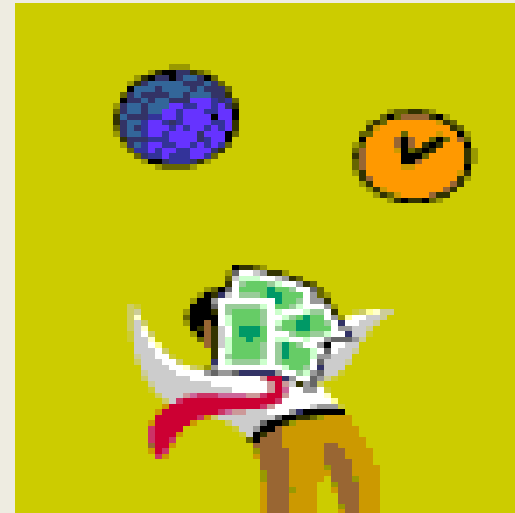


# Set Goals

- Do a thorough scan of your environment
  - Floor plan
  - Network connections; wireless connections
  - Where computers will be installed
  - Tablets vs. stationary workstations in exam rooms
  - Clinical support staff needs
  - Scanning stations
  - Scanning options

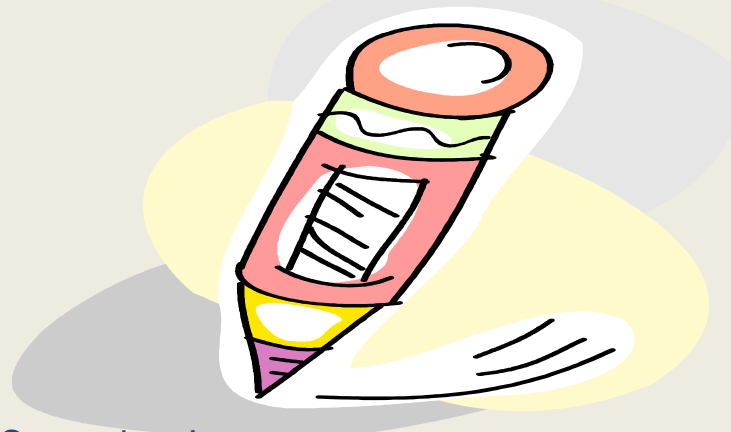
# Prioritize Needs

- Develop an EHR functionality checklist
- Find existing resources i.e. MedQIC, The Certification Commission for Healthcare Information Technology (CCHIT)
- Prioritize functions
  - Must have
  - Would like to have
  - Not critical



# Develop a Request for Proposal

- Must be based on your requirements
- Allows for a side-by-side comparison
- Sample RFP's are available on the Internet from several resources including [www.HRSA.gov](http://www.HRSA.gov), [www.mgma.com](http://www.mgma.com), [www.orchardsoft.com](http://www.orchardsoft.com)





# Select RFP Recipients

- Narrow the field to four or five RFP recipients , there are currently over 200 EHR vendors available
  - PMS interface, other system interface capabilities if needed
  - Practice size; most vendors target a niche
  - EHR ratings; several are available over the Internet
  - Network, talk to other practices that are comparable in size and structure that currently use an EHR product

# Narrow the Field

- Identify the person on the committee who will receive all communications and proposals from the vendors
- Develop an EHR evaluation form, there are several available through the Internet at [www.HRSA.gov](http://www.HRSA.gov), [www.MGMA.com](http://www.MGMA.com), [www.AAFP.com](http://www.AAFP.com), etc.
- Schedule a reasonable number of demonstrations from your RFP list; usually three to four
- Encourage all selection committee members to attend ALL demos in order to have a fair comparison

# EHR Demonstration- Showtime

- Be prepared for the demonstration
- Use structured predefined patient scenarios based on your practice ; keep the scenarios consistent from vendor to vendor
- Ask the vendor to demonstrate functions that your committee prioritized as very important to determine functionality
- Ask to see sample reports
- Explore all system capabilities, not just note creation including labs, health maintenance, prescriptions, triage capabilities, staff communications, etc.
- Prepare a rating form in advance for all committee members to fill out
  - Excellent sample on [www.aafp.org](http://www.aafp.org)

# Narrow the Field

- Develop a list of additional questions for the top two to three vendors
  - Service capabilities?
  - 24/7 support? Extra charge for support?
  - Are upgrades included in service fees?
  - How frequently do they upgrade the system?
  - Training plan and a project plan?
  - A proven track record in your area? RHC's ?
  - Does the vendor have a testing plan?
  - Can the system be implemented in modules?
  - Financial flexibility?
  - Hidden costs?

# Check References

- Check at least 3 references for every vendor that should include:
  - Physician users
  - An information technology person
  - Senior management person
- Take notes during your conversation



# Check References

- Vendor will provide list of “happy customers”
- Check some references on your own
  - List serves
  - Networking
- Have a prepared list of questions to ask
- Compare vendor satisfaction with current customers



# Rank the Vendors

- Based on the RFP's, demos, and reference checks rank the vendors
  - Functionality
    - Your prioritized functions
  - Total cost
    - Hardware
    - Software
    - Training
    - Support
  - Vendor characteristics
    - Excellent service?
    - Training and support?
    - Financially secure corporation?

# Rank the Vendors

- The committee must determine how you rank the characteristics
  - Functionality vs. cost vs. vendor characteristics
  - Use a vendor selection tool available on the Internet at [www.mgma.com](http://www.mgma.com), [www.aafp.org](http://www.aafp.org) or several others
  - Make sure when you look at cost you include all costs over 5 year period ( software, hardware, support, licenses )



# Site Visits

- Find practices similar in size and composition
- Bring at least one clinician as well as IT and senior management
- Observe the system during actual patient visits
- Talk to all personnel including front office, IT, billing
- Ask about the implementation experience
- Take notes



# Select a Finalist

- Chose your top 2 contenders based on RFP's, demo's, site visits
- Having 2 contenders strengthens your position during negotiations
- Select system that has top ranking and negotiate a solid contract



# Verify Commitment

- Determine selection committees approval
- Discuss choice with all key stockholders
- Possible repeat demo to include all staff
- If concerns are uncovered be prepared to go back to verifying references and repeat any additional steps necessary to verify commitment

# Formal Contract Negotiation

- Make sure that all current and future costs are spelled out
- Vendor time commitment to training and implementation should be spelled out
- Consider the possibility that the vendor could go out of business and cover yourself
- Request that the source code be put in escrow; Clarify circumstances under which you would have access to it
- Have an attorney familiar with software contracts review your contract before signing

# Final Notes

- The process takes time, do not rush or the end result can be very costly
- It is highly suggested that you follow this process even if you believe you know which system you will select
- Do not skip any of the steps, if your selection is methodical and critical your chances of experiencing a good EHR transition will increase

QUESTIONS?????

