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

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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
  - Triaging
  - 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, www.mgma.com, 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

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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, www.MGMA.com, 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

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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, 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??????