



Electronic Health Record (EHR) Selection: Step-by-Step Guide

1. Develop an EHR Selection Team

- Identify key decision makers.
- Determine team member roles.
- Include at least one member from each future user group (e.g., clinical staff, office staff, etc.).

2. Identify Key Workflow Issues, Goals and Timeline

- Identify the workflow issues in your current system that the EHR should solve.
- Prioritize the workflow issues.
- Create an EHR selection timeline.

3. Create a Broad List of EHR Vendors for a Request for Proposal (RFP)

- Utilize Web searches, Web-based EHR selection tools, EHR rating systems, recommendations from other physicians or professional associations, etc. to narrow your EHR vendor search down to 10 or 15 products.
- Map the EHR functionality to solutions for your key workflow issues. This includes understanding and analyzing the components of the EHR product (e.g., a "prescribing tool" should address challenges associated with medication refills, drug allergies, interactions; the "call intake" screen should assist the nurses with documenting patient phone calls and assigning relevant tasks to other providers, etc.).
- Learn more about the EHRs and their functionality. It will help you better understand what to include in the RFP and possibly modify the initial scope for your minimum requirements.
- Divide the EHR functional components into three categories; 1) required components; 2) desired, but not critical, components; and 3) components that are not necessary.
- *EHRs in this broad list should, at a minimum, target your practice segment market and appear to have functionality that solves your critical workflow issues.*
- Use the following variables to narrow down your selection: best ratings, experience in interfacing with relevant systems (ask your PMS and Lab vendors), company size, number of sites using the product, number of physicians using the product, etc.
- Feel free to include companies that may not have the largest installation/user base or have not been in the business for more than 5 years if you feel their product appears superior, viable, and has received great ratings. If your team thinks the EHR might be a future star, you may want to include them on your list of vendors for RFP.

4. Create and Submit Request for Proposal (RFP) Documentation

- Request for Proposal (RFP) documentation is a great tool that enables you to understand and learn about products and companies in greater detail.
- Provide the vendor with information about your clinic to receive useful, specific information regarding how the selected product fits into your practice setting. If the EHR vendor is selected to do an on-site presentation, they will use the information you provided in the RFP to prepare a better presentation, emphasizing solutions for your workflow and patient care challenges.
- Include a cover letter with each RFP submission. Describe your clinic and what workflow challenges you are facing. If you are on a tight schedule, include a RFP response deadline date.
- **IMPORTANT:** Request a sample contract. This will allow you time to prepare specific questions regarding the vendor's contract that can be asked during your on-site demonstration.

5. Analyze RFP Responses and Invite Vendors for On-site Demonstrations

- Eliminate vendors that do not respond to your RFP. Some vendors may not target your market, or may not have time, interest or resources to accommodate you in the selection and implementation process.
- Group RFP responses in four categories: 1) do not meet minimum requirements; 2) meet minimum requirements; 3) meet minimum and desired requirements; 4) exceed minimum and desired requirements.
- Further narrow the list of EHR vendors by utilizing the following variables: number of installation sites similar to your practice, confirmed experience in writing interfaces to relevant systems, company size, viability, etc.
- Compare functionality, pricing, company viability and capacity in detail prior to inviting vendors to conduct on-site demonstrations.
- View on-line product demonstrations to get a feel for the user interface and functionality. *On-line presentations are not a substitute for on-site demonstrations.*
- Utilize one of two approaches when inviting vendors to visit your site to conduct demonstrations:
 - i. "Best Only"- Invite three to five vendors that appear superior based on the RFP responses. All of the vendors in this group should meet or exceed your minimum and desired functionality.
 - ii. "Expanded Group" - Invite the top three vendors that meet your minimum and desired requirements. Include an additional two vendors new to the market, have fewer installation sites or few sites similar to your practice. These vendors should meet your minimum requirements may offer only a few desired functionality requirements, but still appear to have a great product. *Remember, if you are considering an EHR vendor new to the market, you should analyze and understand company viability and their capability to conduct timely implementations and support you well into the future.*

6. Prepare for On-site Demonstrations

- Create a vendor evaluation tool for each team member to complete during the demonstration.
- Create at least two different patient encounter scenarios for the vendor to use when demonstrating EHR functionality. Select the scenarios based on how you envision the EHR should solve some of your current documentation and/or workflow issues. Don't share the scenarios with the vendor until they arrive for the on-site demonstration. Vendors that receive scenarios prior to the on-site visit may "tweak" their standard tools before the demonstration.
- Create a list of questions that you want to ask the vendor, including the functionality you want to see demonstrated.

7. Participate in Vendor On-site Demonstrations

- Vendor demonstrations are a minimum of one half to a full day in length.
- Vendor teams will include a sales representative, a technical representative (implementation specialist or integration specialist) and a physician paid by the vendor for demonstration and sales support.
- Encourage staff attendance at the vendor demonstration. All team members and potential decision makers should attend. If all staff are unable to attend at the same time, the vendor may demonstrate features for a few separate groups of staff over the course of the day. Prepare an attractive lunch menu so even the biggest opposition will stop by. ☺
- Allow the vendor to conduct their "canned" presentation first, without interruptions. Then ask the vendor to demonstrate the documentation process for the prepared scenarios. Remember to present the same scenarios to each vendor so you can easily compare them later.
- Ask the vendor to demonstrate each key functional component of the EHR, in addition to the clinical documentation components (disease management, drug interaction checking, decision support tools, reminders, access to medical knowledge, communication tools, workflow management, etc.). Group your questions/requests into areas of similar EHR functionality to ease the demonstration process for the vendor and simplify tracking of results for your team.
- Inquire about business/contract issues that you want clarified based on the RFP response.
- Request references (if not provided in the RFP) for clinics with the same attributes and within a reasonable distance. If the vendor does not have references that match your clinic profile, rethink your selection or ask for a discount.
- Request test server demonstration access to allow you and your team time to "play" with the EHR product after the on-site demonstration.

8. Reference Checks and Site Visits

- Prepare a list of questions for reference checks (e.g., satisfaction, implementation glitches, responsiveness, template customization, technical support, etc.).
- Visit clinic sites and talk to the actual users of the product. Interview different types of users, not just the users selected by the host site or vendor.
- Remember: Vendors will always recommend the best possible sites/references, so in addition to those recommended, try to identify other clinics using the product in your area.

9. Make an Informed Decision!

- Rank the vendors based on the evaluation tool and references.
- Select two finalists and re-invite them for another on-site demonstration if you can't decide between the two or you have new questions stemming from site visits/reference checks.
- Select your winner, but note the “runner up” in case contract negotiations start to go bad with your initial selection.
- Choose wisely - Selecting a “market fresh” vendor without much experience in implementations is risky and might lead to potential failure for many reasons. The same is true for vendors whose EHR business is not the primary source of their business revenue. They may abandon the EHR business if it's not profitable. On the other hand, there is no reason why you should not give a vendor preference if their product is superior and the company is viable.
- Gain benefits - Ask for a discount based on the vendor's “relative inexperience” (if applicable). Ask for additional discounts/benefits if you are willing to serve as a reference site or a development support site.
- Protect yourself - Make sure you have a solid contract that transfers responsibilities to the vendor if implementation delays or failure occur. The contract should specifically state that your clinic owns the data and what happens to the data if the vendor goes out of business. Generally, data should be returned in a usable electronic format, and product “source code” should be turned into public domain ownership. Seek qualified legal assistance if possible.