



### GENERAL GUIDELINES

- **Establish a Process:** This will allow you to evaluate systems in a more consistent manner, to more effectively make an “apples-to-apples” comparison, and to not be as easily distracted by sales pitches.
  - Establish a team, which will be responsible for evaluating systems.
  - Develop a standard set of questions to ask.
  - Utilize a scorecard or similar mechanism to consistently document your evaluation of vendors and systems.
- **Know Your Priorities:** Identify the problems and issues within your practice, which the system needs to solve.
  - Conduct a needs assessment and prioritize the practice’s needs.
  - Map identified needs to system features and functionality, which will address those needs.
  - Communicate those needs to vendors throughout your evaluation, both in your request for proposal (RFP) and during demos.
- **Drive the Product:** During product demos, don’t allow the sales person simply to “drive” the product for you.
  - Utilize patient visit-based scenarios to better determine how well a system will fit your workflow.
  - Use demos to determine first-hand how well and easily a system allows you to document a visit, write a prescription, etc.
- **Make the Vendor Show You:** “It can do that” is not good enough. Have the vendor show you or point you to a client where a particular feature or function is in live use.
- **Involve the Staff:** The system has to meet their needs as well, so include them in the evaluation process as much as possible.
  - Ensure the system selection team includes representatives from other departments.
  - Make sure the needs assessment addresses the needs of the entire practice.
  - Allow staff opportunities to sit on some product demos, especially for products, which are on the practice’s short list.
  - Give staff an opportunity to weigh in on the final decision.

### CONDUCTING A PRODUCT DEMO

- Use patient visit-based scenarios:
  - Multiple chronic conditions, e.g., diabetes and hypertension
  - Different diagnostic and/or treatment needs
  - Utilize actual patient cases

- Develop workflow scenarios:
  - Prescription refills/renewals
  - Lab results follow-up
  
- Ask data questions:
  - Patients with particular disease, e.g., diabetes
  - Patients on particular medication, e.g., Vioxx
  - Patients with a particular lab result, e.g., patients w/ LDL-C > 130 mg/dL
  - Questions with multiple search parameters, e.g., patients with diabetes who within the past year have had a HbA1C > 9.0%

### Evaluating Product Functionality<sup>1</sup>

Use the following checklist to help evaluate specific product functionality.

Ease of Use	Workflow	Availability	Cost Considerations
<ul style="list-style-type: none"> <li>▪ Did the product perform the function with ease and intuitively?</li> </ul>	<ul style="list-style-type: none"> <li>▪ How would this functionality be done?</li> <li>▪ By whom among practice staff?</li> <li>▪ Does it fit within practice's current workflow?</li> <li>▪ Are there impacts to the practice's current workflow that represent major changes?</li> </ul>	<ul style="list-style-type: none"> <li>▪ Is this functionality available now?</li> <li>▪ Is it included in the standard product offering?</li> <li>▪ Is customization required?</li> <li>▪ Who has to do the customization – vendor or client?</li> </ul>	<ul style="list-style-type: none"> <li>▪ Which product module includes functionality? Is it included in the quoted price?</li> <li>▪ Is additional third-party software required? What is the associated cost?</li> <li>▪ Is additional hardware required? What is the associated cost?</li> <li>▪ Is on-going maintenance required? What are the associated costs? Who does the maintenance?</li> </ul>

<sup>1</sup> Adapted from "Electronic Health Record (EHR) Product Guide." Object Health. May 2005.

### CONDUCTING REFERENCE SITE VISITS

- Ask vendor for client list and contact clients yourself.
  
- Visit practices with a similar profile:
  - Size and specialties
  - Problems and goals
  
- Conduct a structured visit:
  - Establish overall goals
  - Develop a set of questions to ask
  - Identify processes and functions to observe

## Guidelines for Evaluating Systems

- Bring practice staff along.
- Spend as much time as possible watching the system in use.
- Understand references' motives for hosting visits.

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