

# EHR SELECTION CHECKLIST

A step-by-step guide to selecting the right EHR for your practice

## GUIDE HIGHLIGHTS



Over 100 actionable steps to EHR selection success



Checklist format to keep on top of completed tasks



Covers the entire selection process up to contract signing



## INDEX

3

Create an EHR selection team

5

Gather your requirements for a new EHR

7

Create an EHR budget and forecast ROI

9

Compile and send out an RFP to vendors

11

Arrange demos with shortlisted EHR vendors

13

Make your final selection decision



## CREATE AN EHR SELECTION TEAM

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Selecting and implementing a new EHR is not something you can do alone.

If you want to find the right system for your practice - one that will both increase patient throughput and improve quality of care while making your staff's lives that bit easier - you'll need input from across your practice.

Use the process below to map out your key user groups and create a representative EHR selection team.

### MAP OUT KEY EHR STAKEHOLDERS

- Physicians
- Nurses
- Other clinical staff (e.g therapists, counselors, midwives, physiotherapists)
- Billing department
- Practice management
- IT department
- Administrative staff (e.g receptionists, secretaries)

### RECRUIT YOUR EHR SELECTION TEAM

- Recruit representatives from all key stakeholder groups
- Identify executive sponsor for your project
- (Optional) incentivize selection team membership by offering perks, e.g extra day PTO, free food during meetings, cash bonus on successful completion of selection project
- Appoint a project manager for EHR selection
- Decide whether you need to hire an EHR selection consultant. If so:
  - Define scope and timeline of consultant involvement

- Find out how much consultancy requirements will cost and get budgetary sign-off
- Create consultant shortlist
- Interview candidates and review references
- Onboard consultant and establish responsibilities
- Establish responsibilities and preliminary task list for each team member



## GATHER YOUR REQUIREMENTS FOR A NEW EHR

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Once you have your team, it's tempting to jump into making decisions about the shiniest, up-to-the-minute features that you're going to look for in your new system.

**Stop.** Take a step back.

Before deciding on anything concrete, think about challenges facing your and what an EHR could do to minimize these. Forecast for future needs as well - EHR selection is a significant investment in terms of both time and money, so you want your system to evolve with your practice over time. Software that won't meet your needs in a year's time will drain your finances and diminish the quality of care that you can offer, so take time over this step.

### MAP OUT YOUR BUSINESS REQUIREMENTS

- Create a list of current processes a new EHR should support
- Create a list of practice challenges your current EHR (if you have one) is not meeting, e.g:
  - Interoperability with other systems
  - Poor patient throughput
  - Slow billing process
  - Ability to meet criteria for Meaningful Use incentive programs
- Identify future needs of practice due to strategic development initiatives, e.g:
  - More clinical staff
  - More support staff
  - Support for multiple specialties
  - Potential telehealth offering
- Consult each department on the challenges they face
- Create an EHR requirements list, assigning a priority value and timeline for implementation for each

## MAP OUT YOUR FEATURE REQUIREMENTS

- E-prescribing requirements (e.g adverse drug events, medication decision support)
- Patient portal (e.g scheduling, automated appointment reminders)
- Lab integration requirements (e.g automated screening, follow-up scheduling)
- Charting requirements (e.g specialty-specific workflows, built-in normative values)
- Analytics requirements (e.g population health management, predictive analytics)
- Scheduling requirements (e.g check in, multi-provider scheduling, automated reminders for insurance/payer type)
- Compliance and certification requirements (e.g HIPAA, Meaningful Use)
- Billing requirements (e.g claims rejection analysis, electronic payment tracking)

## MAP OUT YOUR SYSTEM REQUIREMENTS

- Identify number of users who will require system access
  - Break down into clinical and non-clinical user groups to assist with budgeting
  - Identify need for secure access controls and levels
- Decide on EHR delivery method (cloud vs on-premise)
- Identify requirements for mobile/tablet access (iOS app, Android app, web app etc)
- Define offline system access requirements
- Identify interoperability requirements

## MAP OUT YOUR SUPPORT REQUIREMENTS

- Decide on desired support scope and delivery method (phone support, online support etc)
- Document training requirements (classroom training, on-site training)
- Document requirements for implementation consultancy
- Document data migration requirements for these critical data sets
- Identify external requirements for system and network maintenance



## CREATE AN EHR BUDGET AND FORECAST ROI

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New EHRs don't come cheap, so before proceeding you'll want to know whether the expenditure will be worth it. Perhaps more importantly senior management will too, and as they get the ultimate say in whether your project gets the go-ahead, it's important that you offer them thoroughly-researched, reliable figures to work with.

Part of this involves compiling a realistic software budget, with hidden and ongoing EHR costs taken into account. This will also help you shortlist potential vendors, as any that are wildly outside your budgetary capabilities can be disregarded immediately.

### CREATE AN EHR SOFTWARE BUDGET

- Forecast price of system and components:
  - Out-of-box price
  - Hardware upgrades (if implementing on-premise)
  - New technology (e.g tablets for mobile charting benefits)
- Forecast implementation costs
  - Consultancy fees
  - Staff overtime
  - Reduced patient throughput during implementation
  - Staff training
  - Other vendor implementation services (e.g data migration, customization)
- Forecast costs of vendor support packages and upgrades
- Add 10% to final budget figure to account for inefficiencies, unforeseen issues and project overrun

### FORECAST EXPECTED ROI OF NEW EHR

- Set timeframe for TCO and return calculations
- Forecast the value each requirement will bring to the practice within the specified timeframe

- Forecast costs for the new system within the specified timeframe
- Work with analysts and finance to produce final ROI forecast figures
- Compare ROI forecasts for the new EHR with those of other prospective points of investment
- Report on ROI forecasts to practice management
- Receive sign-off on your projected budget





## COMPILE AND SEND OUT AN RFP TO VENDORS

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You won't be sending out an RFP to every vendor you come across, so it's essential to take the time to narrow down your options into a shortlist of potential partners that are a good fit for your practice.

Looking for vendors that have a large client-base in your specialty is a good place to start, and you can also use your professional networks to gather recommendations. Once you have a viable vendor shortlist, you can begin constructing and sending out RFPs.

### RESEARCH AND SHORTLIST EHR VENDORS

- Research EHRs used by practices with the same specialty to yours
- Leverage professional network for recommendations
  - Colleagues (what did they use in previous positions?)
  - Ex-colleagues
  - Specialty organizations/professional associations
- Leverage online network and tools for recommendations
  - Software review sites
  - LinkedIn groups
  - User forums
  - Quora
- Identify specialty-specific EHRs
- Create a vendor shortlist
- Produce an RFI document and send to vendor shortlist
- Narrow shortlist based on RFI responses

### CREATE AN RFP DOCUMENT

- Provide practice background

- Number of clinical staff
- Specialty
- Location
- Provide project background - why are you selecting a new EHR?
- Provide in-depth, end-to-end timeline for EHR selection and implementation
- Outline all EHR requirements and their priority. Provide space for vendors to explain how their software can meet them
- Request at least three references from practices similar to your own
- Request information on vendor implementation team personnel and their experience
- Provide a deadline for RFP responses and information on when you'll be in contact
- Send out RFP to EHR vendor shortlist

### **EVALUATE RFP RESPONSES**

- Disregard late, incomplete and wildly off-budget proposals
- Agree criteria and scale for evaluating RFPs with EHR selection team
- Get each member of your selection team to use scale to rank vendor proposals
- Average out selection teams' responses to proposals
- Discuss scores in selection team meeting; invite 3-5 best proposals to demo their product



## ARRANGE DEMOS WITH SHORTLISTED EHR VENDORS

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Inviting your shortlisted vendors to demo their EHR is a great opportunity to see their software in practice.

Sales reps will likely want to show you the flashiest aspects of their product, potentially sidelining discussion of your key requirements if they don't match the system's strong points. Use the steps below to stay in control of your demos and see your required features in action.

### PLAN YOUR VENDOR DEMOS

- Build selection team to attend software demo with representatives from all user groups:
  - Physicians
  - Nurses
  - Other clinical staff (physiotherapists, therapists, midwives etc)
  - Practice management
  - Administrative staff
  - Billing staff
  - IT department
- Book demonstrations with each vendor on your final shortlist:
  - Identify how many people will be attending demos
  - Book suitably sized rooms
  - Plan suitable number of refreshments
  - Quora
- Ask vendor representative for technical requirements (e.g projector) and ensure their needs are met
- Identify hypothetical real-life scenarios for vendor rep to follow at demo

**CONDUCT AND EVALUATE EHR DEMOS**

- Agree on scale and criteria by which to evaluate EHR demos
- Create scorecard and hand to demo attendees before each demo
- Ensure attendees complete scorecard during demos or immediately after the demo ends
- Average out responses to get idea of the system that will suit your needs best



## MAKE YOUR FINAL EHR SELECTION DECISION

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Congratulations - you've put the work in and are one final hurdle away from choosing your

It's important to stay focussed here. Making an overly-hasty decision could potentially end with a poor software choice. Bear in mind that implementation - no matter how well-planned - is an expensive and disruptive process. You don't want to have to do it again in a year's time when you realize that the software you chose is a poor fit for your practice's workflows.

Another essential step is to involve your practice legal team in drawing up the contract, as being stung here can lead to unexpected costs further down the line and a stormy relationship with your vendor.

### FINAL EHR SELECTION CHECKLIST

- Produce RFQ document and send to all vendors that were demoed
- Assemble selection committee to review all RFQ responses
- Make provisional selection decision and proceed to contract negotiations
- Agree on reserve choice in case contract negotiations with preferred EHR vendor fail
- Agree terms of purchase and implementation with your chosen vendor, including:
  - Implementation services and fees
  - Number of users (clinical and non-clinical)
  - Final price of system
  - Payment plans and billing specifications
- Send provisional contract to practice legal team to identify any issues
- Sign contract
- Deliver documentation including vendor commitments and contacts to implementation team

This guide was compiled by Kathryn Beeson, EHR in Practice Editor

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