How to Select a Certified EHR

Selecting an EHR system is a critical decision and a significant planning task. There are different opinions regarding when the selection of an EHR system should be made in the planning phase. Some practices go through the planning process and develop the selection criteria they wish to use. Other practices begin by selecting an EHR system and then conduct planning to support the selected EHR system. Most practices develop an initial plan to identify their key goals, select an EHR system that supports these goals, and then finalize their plan after the selection.

After establishing the practice’s objective(s) and planning how EHRs will affect workflows, the leadership team and staff can determine what to look for when considering and selecting an EHR system. The following are several considerations for EHR software comparison that the Regional Extension Centers (RECs) have found useful over the past several months:

- Understand if and how a vendor's product will accomplish the key goals of the practice. Essentially, a test drive of your specific needs with the vendor’s product. Provide the vendor with patient and office scenarios that they may use to customize their product demonstration
- Clarify start-up pricing before selecting an EHR system (hardware, software, maintenance and upgrade costs, option of phased payments, interfaces for labs and pharmacies, cost to connect to health information exchange (HIE), customized quality reports)
- Define implementation support (amount, schedule, information on trainer(s) such as their communication efficiency and experience with product and company)
- Clarify roles, responsibilities, and costs for data migration strategy if desired. Sometimes, being selective with which data or how much data to migrate can influence the ease of transition
- Server options (e.g., client server, application service provider (ASP), software as a service (SAS))
- Ability to integrate with other products (e.g., practice management software, billing systems, and public health interfaces)
- Privacy and security capabilities and back-up planning
- Linking payments and EHR incentive rewards to implementation milestones and performance goals
- Vendor's stability and/or market presence in region
- Cost to connect to HIE
- Consider costs of using legal counsel for contract review verses open sources through medical associations

**Steps to consider when selecting and EHR vendor:**

**Assess Your Requirements**

To get started toward a successful acquisition, you first must understand what your requirements for an EHR are, including:

- Open source or off-the shelf commercial software
- EHR functions such as patient demographic and care management data on patient visits
- Clinical decision support, and reports
- Consents, authorizations, and directives
- Interfaces required to exchange health information with other providers, laboratories, pharmacies, patients, and government disease registries
- Training type and scope (What levels of training will be needed? How many people need to be trained by the vendor?)
- Availability of assistance (How much will be needed for how long)
Decide How to Obtain Your EHR

Other organizations can advise you about the process for selecting and obtaining shared EHR and health information exchange technology. Such as nearby Health Center Controlled Networks, Regional Extension Centers, or your State Health IT offices.

Check Out Possible Vendors

After completing the planning process, you will want to better understand the range and quality of services available from the individual vendors. Find out more about them by reviewing their past performance and determining the length of time they have been providing services to practice settings such as yours. You can collect this information by talking with the vendor and asking other safety net providers about their experiences.

Contact local safety net providers that use EHRs. Find out which EHR vendor your peers are using and see if you can try out their systems. Find out whether they contracted directly with the vendor, or worked through a network and ask about their experience implementing and using the system so far.

Start by asking these questions:

- How long did it take to get up and running?
- How much disruption and delay did you experience?
- What worked to minimize loss in productivity?
- Did the vendor charge additional or unexpected costs not in the original contract?
- Have you performed an evaluation of the system? Is it helping you reach your goals?
- What feedback can clinicians and staff currently using the EHR system provide?

Interview Certified EHR vendors. Using information you collect about vendors, you can begin to narrow the field of ones you want to consider seriously. In doing so, check to ensure that those on your list also are on the Office of the National Health Coordinator for Health IT site listing Certified Health IT EHR Products.
Contact selected vendors to set up a phone interview. In the discussion, ask these questions:

- What kind of organization are you (e.g., for-profit, non-profit)?
- How long have you been providing EHRs?
- What local safety net providers do you work with? When did you start working with them?
- What implementation and training services do you offer?
- What is your price range for a system that fits basic needs of safety net providers?
- Do your prices include the cost of upgrades?
- What type of support do you provide after launch?
- Will you demonstrate your product? Will you demonstrate a product in use at a provider’s site?

**Arrange for vendor demonstrations.** After further narrowing the list based on initial interviews, schedule demonstrations with a few of the most likely candidates. For best results, provide patient and office scenarios that the vendor may use to customize their product demonstration. Schedule enough time to thoroughly test out and discuss their product. Invite as many staff members as you can to build buy-in for the EHR project.

During the demonstration, check out these features:

- Availability of Common EHR Functions
- Ability to integrate with other providers and data systems (e.g., practice management software, billing systems, and public health interfaces)
- Capabilities to Ensure Privacy and Security
- Ability to link payments and EHR incentive rewards to implementation milestones and performance goals and conduct data queries for support of quality improvement.
- Vendor service offerings
- Implementation support (amount of support provided, type and scope of training, other services)
- Server options (e.g., your server, or a web-based server, ASP)
- Queries and reports for use in quality improvement

**Ask for general cost information.** Vendors provide final cost estimates as part of their proposals, but you can ask for general information or cost ranges for:

- Data migration
- Hardware
- Software
- Maintenance
- Upgrades
- Connections needed for health information exchange
- Customized reports
- Option of phased payments

**Obtain Vendor Proposals**

Select your top three to four vendors and request proposals from them. Requesting more will require a complex proposal evaluation effort. Fewer will not provide enough information for comparison.

Follow these steps in developing your request for proposal (RFP):

- Write a clear list of specific EHR system requirements
- Prepare the criteria you will use to make a selection
- Distribute copies of RFPs to selected vendors
Remember that the contracting process is governed by rules to protect both you and the vendor.

**Select Vendor**

The vendor that offers the best fit with your selection criteria may not necessarily submit the best written or most attractive proposal. The most important thing is how each vendor’s proposal rates on the selection criteria that you included in the RFP.

Below are recommended steps for selecting the best proposal:

- Ask several reviewers from your team to score proposals independently according to the evaluation criteria listed in your RFP.
- Compare reviewer comments and scores to determine the best value. Think about the best value as a combination of the proposed services, reputation of the vendor, customer service quality, as well as cost realism and competitiveness.
- For the top scoring proposals, request and check references from current users.

Use contracting tools to help you make the best choice for your needs and budget. These tools include:

- Reference Checking For EHR Vendors Worksheet
- Vendor Evaluation Matrix Tool
- Vendor Meaningful Use Compare Tool
- Reference Checking For EHR Vendors Worksheet
- Vendor Pricing Template

**Negotiate Contract**

After selecting a vendor, the next step is to negotiate costs and contract terms. Ask whether as a safety net provider, your organization might be eligible for discounts. Think about whether there are other negotiating points. For example
are there several other providers in the area considering using the same system that might make it less costly for the vendor to offer training or assistance.

Find organizations you can collaborate with, including a Health Center Controlled Network, Regional Extension Center, or State Health IT Office. They can assist you with contracting or connect you with other safety net providers considering system adoption to help negotiate cost savings through group purchasing power.

**Start Planning the Implementation**

After the EHR contract is in place, the vendor will work with you to develop an implementation plan. The plan should describe how you will migrate your patient records (paper or files from an old EHR) into the new system. It should specify how to phase in the various EHR functions to minimize downtime and disruption in patient care. This plan also will include steps for installing the system and conducting staff training.

**Work with Vendor After System Launch**

After launch, you will continue to work with your vendor to fine tune the system based on users’ needs and the day-to-day impact of the EHR on workflow. You also will need your vendor for system maintenance. It will be helpful to designate a primary vendor contact and back up contacts and to insert language in the vendor contract that specifies required turnaround time for response to requests.

Work with your vendor to develop a Disaster Recovery plan for dealing with system malfunctions or failures. You also should expect the vendor to provide immediate response in these situations and to offer on-site assistance during start up. If you do not find your vendor responsive, consider joining with other local providers who use that vendor to advocate together for more attention.

Over time, you may choose to add new features to your EHR, such as interfaces that will let you exchange health information with other providers and your patients. Making these changes to your original contract may not be the most
cost effective approach. In some cases, it can be more economical to switch vendors.

Attributions:

HealthIT.gov, Step 3: Select of Upgrade to a Certified EHR System, public domain: https://www.healthit.gov/providers-professionals/ehr-implementation-steps/step-3-select-or-upgrade-certified-ehr

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