10 STEPS

Find the EHR That's Right for You

A simple guide to select a flexible and integrated health IT solution

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The process to select your next EHR is quite an undertaking. This guide can help you find a flexible, integrated EHR platform that will take your practice through changes in industry, technology, regulatory and reporting requirements, consumer expectations, and unforeseen events like COVID-19.

THE NEED FOR CHANGE IS IN THE NUMBERS

Many physicians are not happy with their current EHR.

According to a survey of 521 primary care physicians:

- **59%** believe EHRs need to be overhauled
- **67%** would like to see interoperability deficiencies resolved
- **43%** want to see improvements to predictive analytics to support disease diagnosis and prevention, as well as population health management
- **32%** want to see integrated financial information in the EHR to give patients a better understanding of the costs related to their care

Source: How Doctors Feel About Electronic Health Records, National Physician Poll by the Harris Poll, March 2018, Stanford Medicine, https://med.stanford.edu/content/dam/sm/ehr/documents/EHR-Poll-Presentation.pdf

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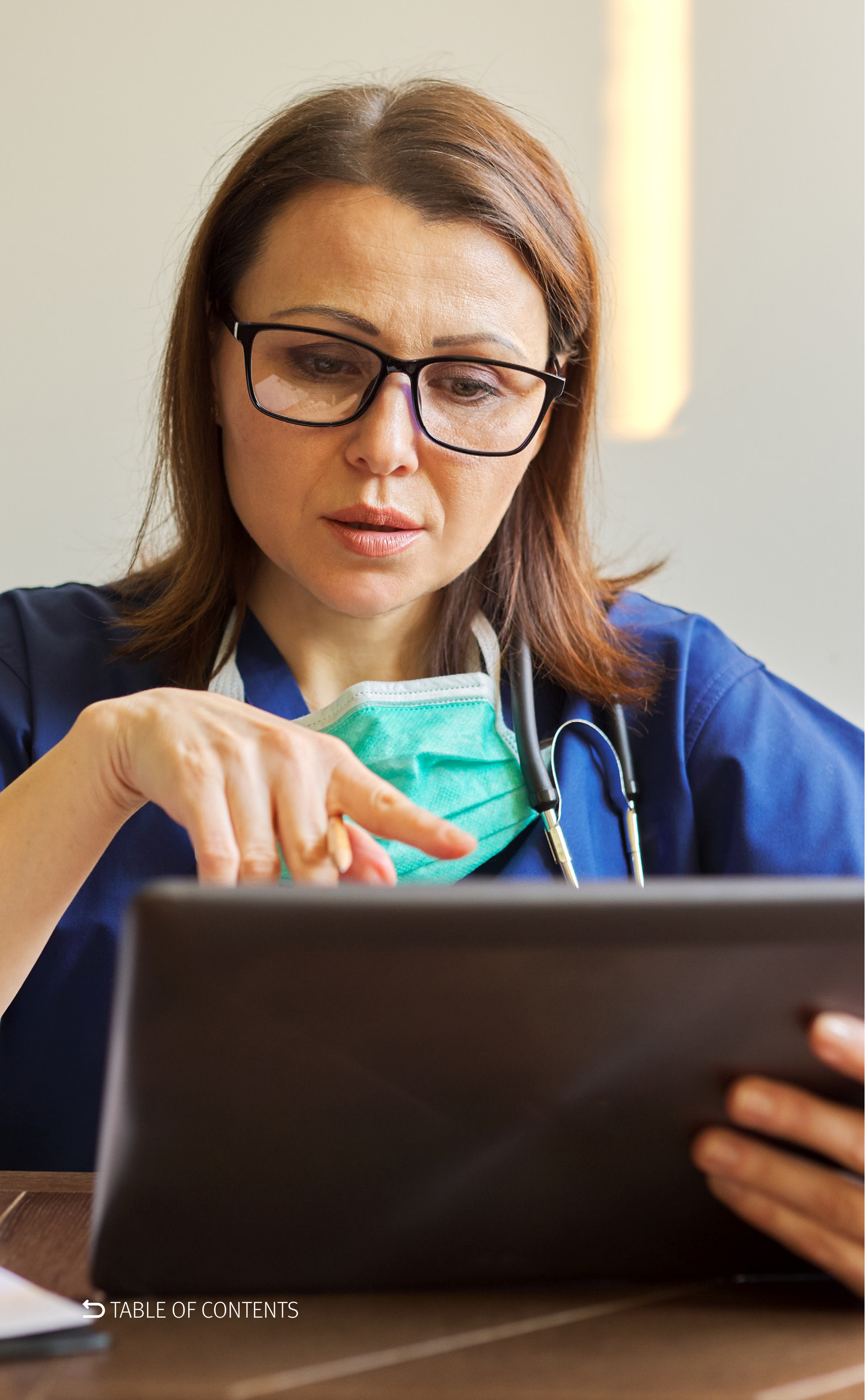
STEP 1

IDENTIFY YOUR NEEDS

Common pain points

- Integration issues with other software or EHR/PM systems
- Missing EHR functionality
- Challenges in staying current with regulatory and reporting requirements
- Software usability issues (slow speed, too difficult to use)
- EHR software does not work on mobile devices
- EHR is not configurable or built for your specialty
- Dissatisfied with the type of systems architecture (web-based or client server)
- Software vendor not helpful
- Lack of scalability to expand or adjust according to business initiatives

Source: Guide to Replacing Your EHR or EMR System, 2021 National Center for Medical Records, https://www.medicalrecords.com/emr-buyers-guide/guide-to-replacing-your-ehr-or-emr-system



STEP 2

DO YOUR RESEARCH

1. **Build a team**
Assemble a team to guide the selection process with representation from major areas of your organization and at various clinical levels. Include no more than seven members to make decision making easier.

2. **Build consensus and choose potential vendors**
The selection team should meet to build consensus on which capabilities of a new EHR platform are most important to the practice. Next, choose at least four vendors that may meet needs identified by your team.

3. **See solutions for yourself**
Watch demos online to preview each of the identified products. During the demos, each person should note the features they like and rank them, based on how they'd help your practice.

4. **Finalize your features**
Based on your research, finalize your list of key features and functions. The final list will help produce a more solid RFP. It will also help you gauge the overall market.

STEP 3

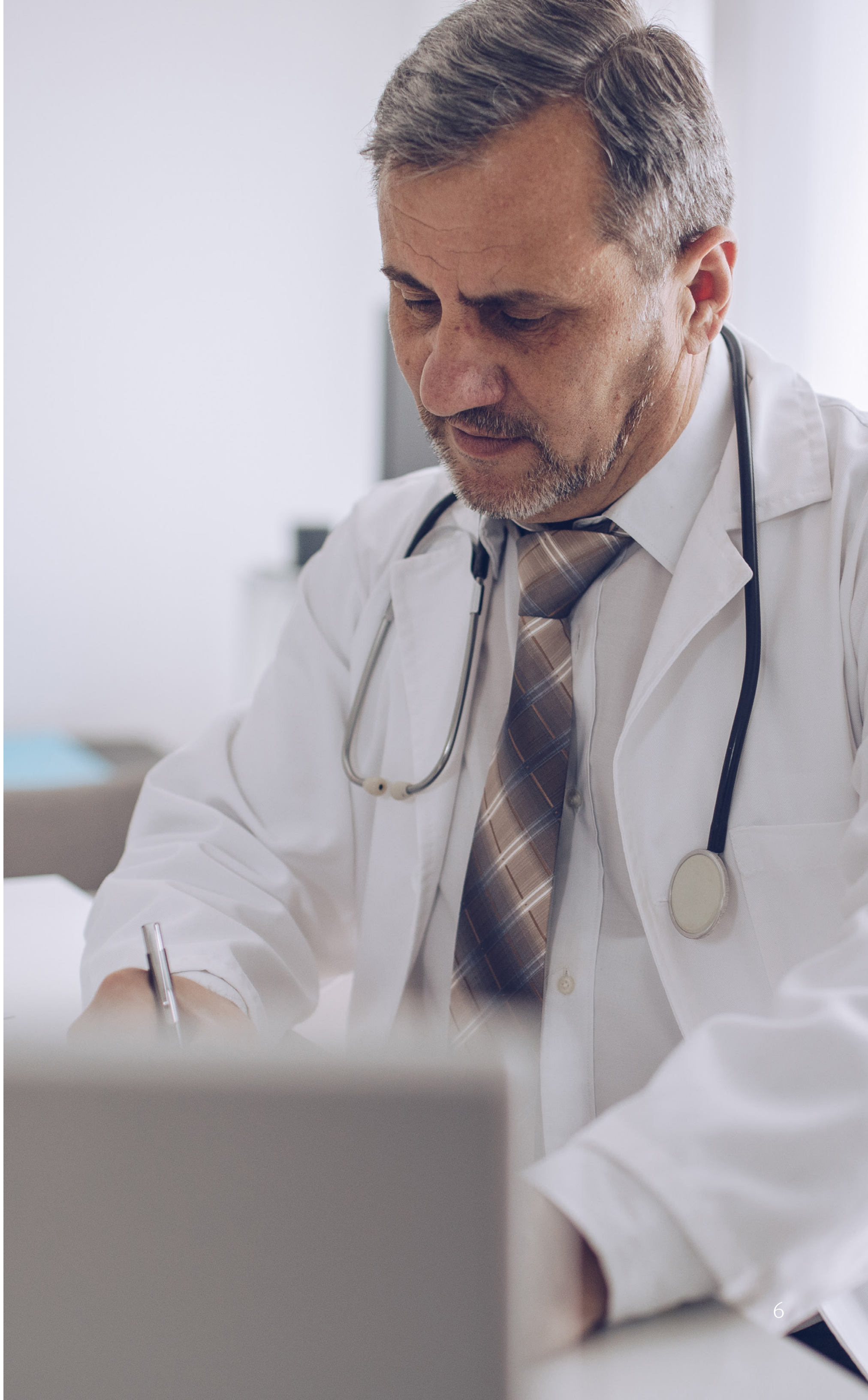
ESTABLISH A BUDGET

To determine a budget for your new EHR system, start by gaining a better understanding of the cost of your current system, as both a yearly cost and total cost of ownership over a set time period. Consider the cost of depreciation on equipment—servers, computers, and peripheral devices. Remember to factor in recurring costs of licensing your EHR software, as well as what you pay for IT support and system maintenance.

Balance cost against potential ROI

When budgeting for the new EHR system, in addition to the costs for software and hardware (or cloud-based hosting, if you select that option), you will need to factor in costs for implementation assistance, training, and data conversions, as part of onboarding to the new system.

Cost factors, however, can be balanced against the potential for return on investment (ROI). If your new EHR platformballows for greater integration and configuration, you will likely save on labor costs.



STEP 4

DRAFT AN RFP

Be specific with your requirements for vendor proprosals. The more clearly you outline your requirements, the better your responses will be.

Components of your RFP

An introduction – Provide information to the vendor about your practice and how you operate from a business perspective. Help the vendor understand the type of practice for which they are submitting a proposal.

Vendor profile – Ask each vendor to share basic information about their company and their EHR solution.

Requirements – Specify all the requirements you are looking for in your new EHR system. Requirements may be written in a question format. Use the answers to compare the offerings of competing vendors.

Timelines – Provide timelines for submission, review, and decision making.

Cost – In addition to asking for cost data, ask vendors to provide explanations for these costs. Also ask about licensing options.

In a perpetual software license, software is installed and operated on hardware located onsite at the medical practice. As a licensee, you may be offered additional services, such as implementation, customization, training, maintenance, and technical support.

In a software-as-a-service (SaaS) model, the software is only available on a hosted platform, (“on the cloud"). Maintenance is included as part of the hosting cost, but there still may be separate implementation, customization, and training services offered.

Generally speaking, a larger upfront investment is needed for a perpetual software license. The SaaS model requires less front-end investment, but necessitates monthly payments.

Selection process – Include a brief summary of how you intend to make a final decision.

Additional RFP Tips

- The first page of your RFP should identify a single point of contact with an email address. Tell all vendors they will be disqualified if they communicate with anyone other than that point of contact or by any means other than the provided email.
- Ask vendors to provide three to five client references with a description of the products and services the vendor provided them.
- Do not share your budget information.

Source: https://www.ehrinpractice.com/a-framework-cheat-sheet-for-your-ehr-rfp-295

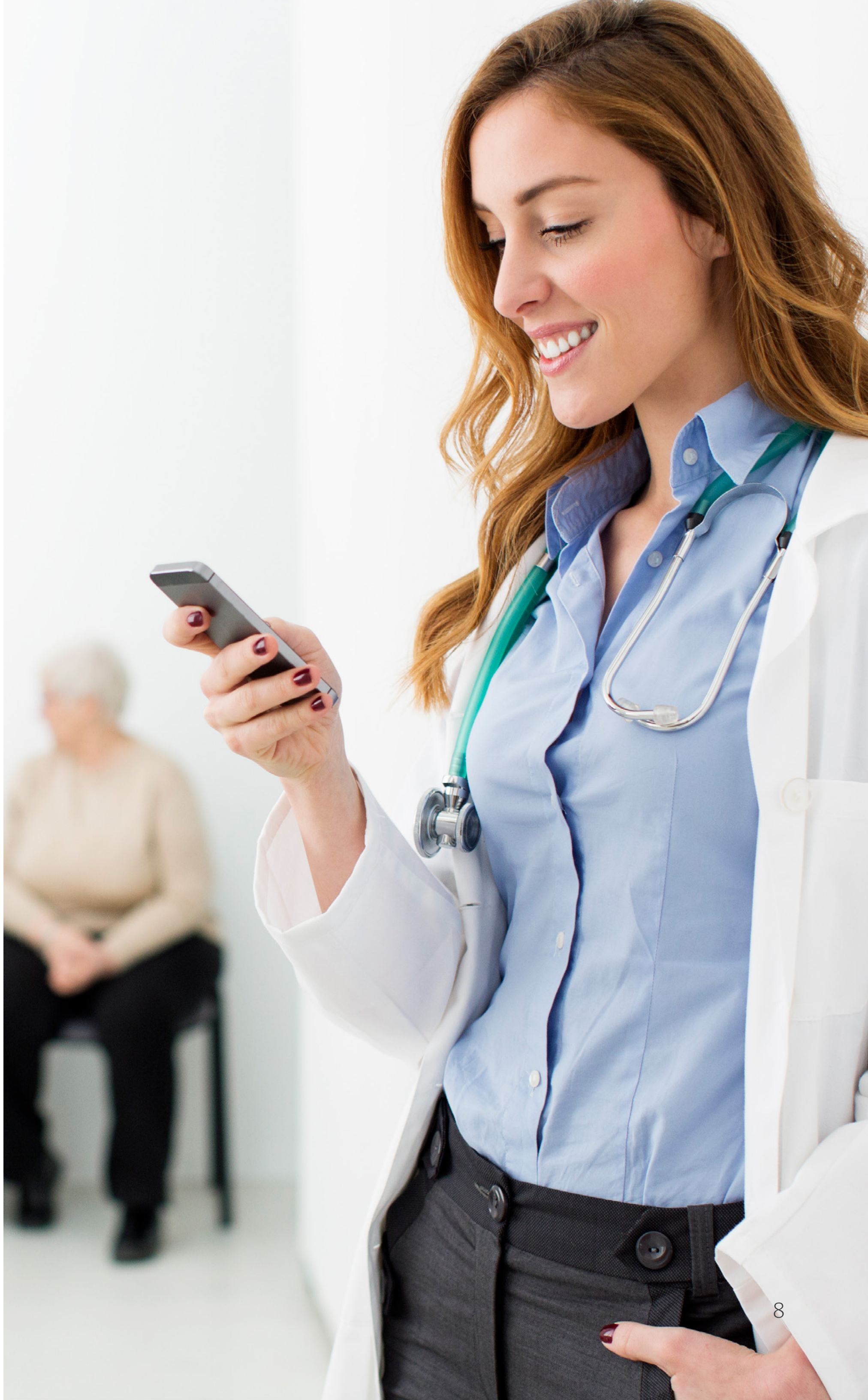
STEP 5

NARROW THE POOL

Evaluate each proposal with a weighted points scale. There are many ways to score vendors and the amount of granularity you apply is up to you. The important thing is that you employ some method to rank all RFP responses that will allow you to feel comfortable that the top few vendors do in fact offer solutions that meet your needs and are within your budget.

Once all team members have scored each vendor, use the average scores to select the vendors who will move forward. Three is optimal, as the next step requires significant resource commitments. Be sure to notify the vendors who will not be moving forward.

Tip — It's not uncommon to find that vendors who meet your needs are outside your budget, and vendors who are within your budget do not meet your needs. If you find yourself in this position, stop and do some additional analysis. Carefully consider your needs and decide whether they can be reduced or if your budget can be increased.



STEP 6

SEE THE PRODUCTS IN ACTION

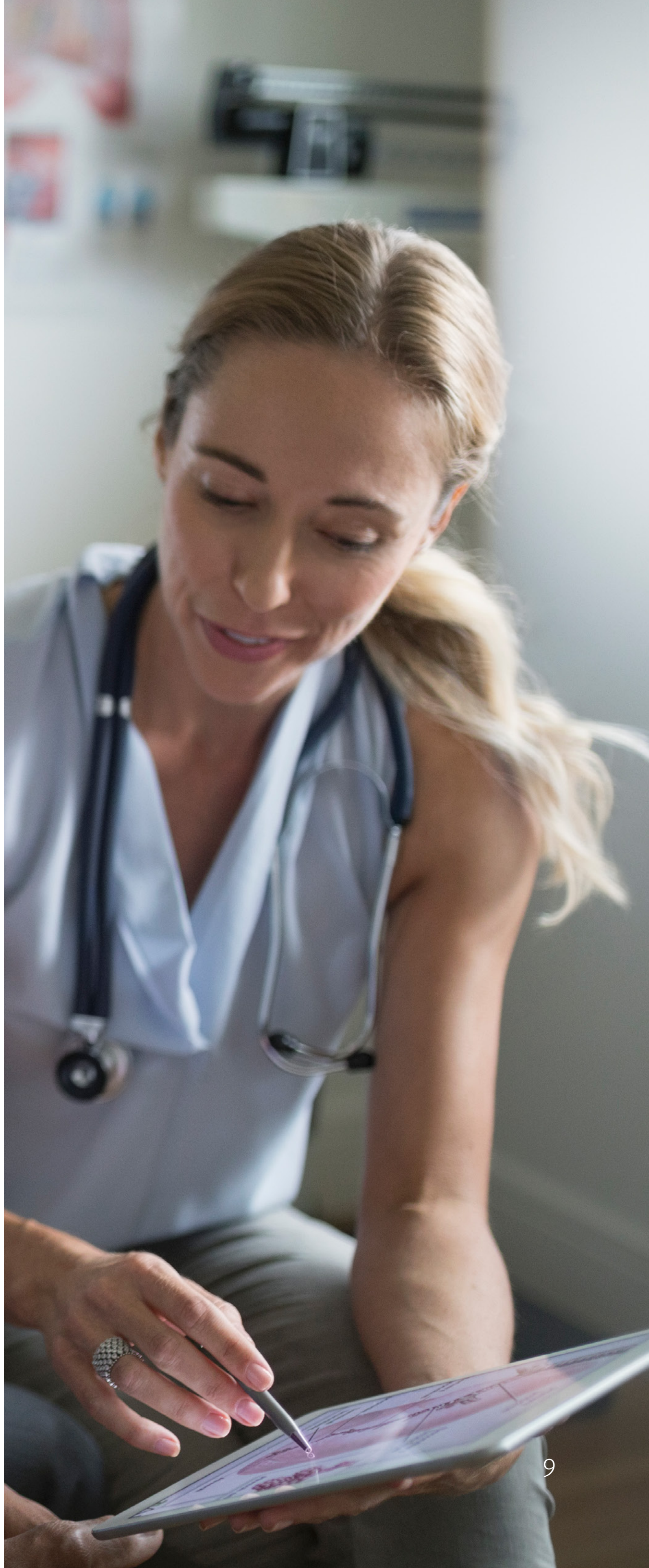
Schedule your top two vendors to conduct on-site presentations. Give them plenty of time (four-hour minimum) and prepare your team to rank every vendor's demo using the same scale.Tell vendors that they must deliver live demonstrations of their products—not slides or any other non-live presentation.

Break away from workarounds

Some organizations like vendors to follow scripts, however this limits vendors who may have creative ways of meeting your needs. It also tends to introduce limitations or workarounds from your current EHR into your selection of a new one. This tendency to carry forward the current methodologies is one of your biggest risks now and during implementation. Remember, this is your chance to rid your organization of workarounds and take a fresh look at all of your operations.

Implementing a new system offers an ideal time to optimize your workflows. Be sure to take advantage of it.

Tip — During the live demo, require each vendor to add a new data element to an existing screen and create a new report using data from that screen. This will allow you to judge flexibility and whether your organization will be able to make changes or be reliant on the vendor for changes. The latter likely means you'll have to pay for any changes and fit your needs to the vendor's availability.



STEP 7

DISCUSS PARTNERSHIP

How you work with a vendor is as important as their product. During the on-site meeting, ask vendors to discuss the following:

Partnership Checklist

Implementation methodology
What is their project plan? How many hours do they expect the project to take? How is the work divided between the vendor and your group? How quickly does the project begin once a contract is executed?

Data migration
Do they migrate data from your system into theirs? How exactly do they accomplish this? How do they price it? What data elements are included? What data do they recommend, if any, that you pay to migrate?

Training
Do they provide professional training staff? What are their credentials? Will they come on-site to train, or do you go to them? What materials do they provide? What system do they use for training? Can they show you a training plan?

Proposal review
Ask the vendor to walk you through their proposal line by line and ensure you understand each charge. Confirm any additional costs not listed on the proposal. Have them describe and justify any costs that may change. Require they follow up by providing all of this information in writing within a week of the on-site meeting.

Get to know the vendor
The on-site demo is your team's chance to learn about the vendor face-to-face. This is your best opportunity to adequately evaluate the vendor before you make a decision, and your first opportunity to build a relationship.

You are seeking a partnership as much as a solution. Assess the vendor's willingness to engage in a long-term business partnership, as opposed to just making a one-time sale. What avenues of communication are in place if you need to seek support after the deal is signed? Ask the vendor what resources they offer to help ensure successful onboarding and ongoing use of their EHR solution. As your practice's needs evolve, what resources do they have in place to help you meet future challenges?

STEP 8

REQUEST BEST AND FINAL OFFERS

After reviewing three-to-five prospects, your team may already have a clear winner in mind. If so, move to the contracting step. If not, narrow the field to two vendors using a team vote, demonstration rankings, or pricing.

Communicate any additional requests for product or service features or changes to your expectations to your two prospects. Now that you've gained a better understanding of their terms for pricing, consider providing additional information that would help them refine their offer.

Ask both remaining prospects to submit a best and final offer. This gives them the opportunity to adjust their pricing and gives you a chance to get a better price.

Tip — Make sure both vendors are aware that there are only two finalists, and they are competing for your business with this best and final offer.

STEP 9

CHOOSE A PARTNER

By now, you may have one vendor who has earned the most votes from your selection team. If not, use price as the final criteria to select your vendor of choice.

Negotiate terms with this vendor until you either sign a contract or reach an impasse. Do not notify your second-place vendor of your decision until you execute a contract with your vendor of choice. Notifying a vendor of second-place status can cause difficulties should you later decide to work with them.

Tip — Be sure to check the client references provided by the vendor. Insights from the vendor's clients add real-world value to what you learned during your research. When you speak to these clients, be ready to ask targeted questions. This will help you better understand how they are using the EHR system.

STEP 10

REVIEW THE CONTRACT AND SIGN IT

Ask your chosen vendor to submit their final contract and software licensing and services agreement, as well as any other paperwork needed to finalize the purchase. Ask if there are any contracts and agreements for any third-party software necessary for the system to operate. You may need to review these agreements as well.

Get legal advice

Send the paperwork to your legal team or outside counsel for a careful review. Make any necessary changes recommended by your legal advisors and make sure they are acceptable to the vendor. You are entering into a long-term partnership, so you should understand everything in the contract and be comfortable with all of the conditions.

If you hit a critical impasse in your negotiation, let the vendor know that if you can't come to terms, you intend to move on to another EHR solution provider. Give them time to respond. If the impasse persists, you may need to switch vendors. If you are satisfied with the terms to which the vendor has agreed, execute the contract.

EXPLORE A SOLUTION BUILT FOR THE FUTURE OF HEALTHCARE

It's a big undertaking to switch your EHR platform. That's why it's important to select a vendor who not only meets your needs now but who will be a partner alongside you as those needs evolve. Consider a partner that can provide a single, integrated platform that supports your entire practice to treat the whole patient.

With this award-winning EHR platform, you can:

- Keep up with regulatory changes
- Reduce burnout with a tightly integrated mobile solution
- Increase efficiency with cost estimation, claims adjudication, and group-scheduling
- Attract and retain patients with a virtual front door to your practice
- Enhance interoperability and leverage APIs
- Receive robust patient information with clinical notes attached to CCDAs (from Carequality, HIEs, or Direct messages)
- Incorporate lab results from a CCDA for more efficient transitions of care

BEST IN KLAS AMBULATORY EMR (11-75 PHYSICIANS) 2021

In 2021, NextGen Healthcare earned Best In KLAS for EMR solution.
(11 to 75 providers)

Improve patient experience and enhance practice efficiency with a:

- User-friendly patient portal platform tied into the EHR and PM
- Patient self-scheduling that enables real-time appointment booking
- Communication platform that enables patients to confirm personal information, complete registration forms and provide insurance information
- Integrated virtual visits to deliver care anytime, anywhere
- Online, patient-friendly payment methods to ensure swift payment and reduce burdens on staff

Choose a partner who will work with you to ensure clinical efficiency, resolve interoperability deficiencies, help you reduce physician burnout, provide financial analytics, and overcome other strategic challenges.

Beyond our proven solutions, the services and support we provide make us part of your team and help you get the most out of your investment.

Act today. Thrive tomorrow.

TAKE THE NEXT STEP.

Contact us at 855-510-6398 or results@nextgen.com.

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