Choosing The Right EHR For You: Best Practices In Vendor Selection & Contracting

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Presented On: January 25, 2013
I. Steps For Vetting Vendors & Their Products & Services

II. Contract Negotiation: Ensuring Best Value And Performance

III. Quick Peek: Key Elements Of An EHR Implementation
I. Steps for Vetting Vendors & Their Products & Services
Key Vendor Evaluation Areas

- Functionality
- Customer support and service
- Implementation expertise
- Company stability
- Cost
Key Phases In EHR Vendor Selection & Contracting

- **Phase 1**: Organizational Assessment And EHR Vendor Research
- **Phase 2**: Preliminary EHR Vendor Selection
- **Phase 3**: Vetting Finalists And Making Final Selection
- **Phase 4**: Contract Negotiation And Implementation Preparation
I. STEPS FOR VETTING VENDORS & THEIR PRODUCTS & SERVICES:

Phase 1 — Organizational Assessment And EHR Vendor Research
Organizational EHR Readiness Assessment

- Review organizational strategic plan and role of technology and EHR in achieving key strategic and operational objectives
- Assess staff readiness for an EHR
- Assess IT infrastructure readiness
One of the keys to successfully selecting a software application is knowing what functionality your business needs or from what software it would benefit.

Get an overview of what products and services are available:
- Trade shows where vendors exhibit
- Requesting marketing and promotional materials from vendors
- Issuing a Request For Information (RFI) to gather basic information about functionality and services
The goal in this step is not to evaluate the vendors, but rather to gain a better understanding of how technology could benefit your organization so that you are able to detail the functional specifications based on both current operations and needs, as well as what “could be.”
For this preliminary screening of vendors, we recommend using “knock-out” factors that are driven by your organization’s business needs and management and purchasing choices.
Commonly Used Knock-Out Factors

- Lack of mission critical functionality
- Vendor size and customer base
- Vendor experience with local market or specific service types
- The vendor’s software technology platform and database
- Whether the vendor has or requires a hosting or application service provider (ASP) option or SAAS (software as a service) option
- Whether the vendor offers wireless or disconnected database technologies
I. **Steps For Vetting Vendors & Their Products & Services:**

Phase 2 — Preliminary EHR Vendor Selection
• Develop a detailed listing of your organization’s functional needs, incorporating any knock-out factors into it

• The exact functional specifications needed may vary from organization to organization, but there are common areas of functionality that you should review to determine which specifications are most important for meeting your needs
Sample RFP Sections

- Vendor Overview
- Technical Information & Infrastructure Requirements
- Training, Implementation Support, Data Conversion, Software Upgrades
- Customer Support Approach
- Data Conversion, Customization & Software Upgrade Processes
- EHR Capability & Implementation Experience
- Software Functionality
- Report Writing
- Scanning, Document Management, & Record Release Capabilities
- Mobile Solutions
- Data Import/Export & Software Interface Capabilities
- Experience In Local Market
- Compliance Plans
- Integration With Primary Care
- Customer Reference Contact Information
- Cost
In this section, ask the vendor to describe its company, customers, and services, as well as what key qualifications they can offer to meet your technology needs.

These answers provide a basic understanding of the vendor’s business.
Technical Information & Infrastructure Requirements

• In this section, ask the vendor to describe the hardware, software, network, and telecommunications set-up needed or recommended for its technology solution.

• Ask the vendor to describe the software platform/database used by its technology solution and any near-term plans for upgrading it, if applicable.

• This section usually contains detailed questions from the technology staff.

• Ask for recommended staffing to support the application once it is up and running.
In this section, ask the vendor to describe its organization’s typical approach to training, implementation, support, data conversion, and software upgrades.

This helps provide an understanding of the time and effort that would be needed to successfully implement the vendor’s technology solution as well as how they support and maintain their products.
Customer Support Approach

• The number of full-time equivalent (FTE) staff members you have in each of these operational areas

• Information on a typical implementation, including key tasks, timelines, and staff members involved both from your organization and the purchaser

• The operations of the vendor’s Help Desk, including information on 24/7 availability, how calls are prioritized, response times, whether the caller has routine access to live staff and all other information of interest to a customer
Data Conversion, Customization & Software Upgrade Processes

- Information about User Groups
- Information about how customers are involved in the software enhancement decision process and how frequently upgrades occur
- The vendor’s experience, if any, in working with large multi-site organizations
- How requests for customization of the software are handled, and specifically for state and Federal reporting requirements
EHR Capability & Implementation Experience

- In this section, ask the vendor to describe its experience and approach to implementing electronic medical records.
- Include information about how the EHR can be configured by your organization (rather than through customizations by the vendor).
Software Functionality

• This is the section where the vendor is asked whether its product supports the detailed list of functional specifications.

• An appendix is included as part of the RFP where vendors can indicate Yes/No to the functional specifications list as well as make comments.
In this section, ask the vendor to describe the report writing capability of its technology solutions, including a listing and description of standard reports, export capabilities and compatibility with other applications, ease of use, etc.

Technical staff will have a number of specific questions for this area.
In this section, ask how the software solution supports scanning and managing documents that are created by other parties so that they can be included in a case or medical record.

Additionally, ask the vendor to describe how the system supports releasing parts or all of the case or electronic records to other parties, both in paper and electronic formats.
In this section, ask how the software solution supports field and home-based service providers with mobile access to your software solutions.
In this section, ask the vendor to describe its expertise in interfacing with common general ledger and human resource applications and in helping provider organizations share data with other providers and stakeholders.
Experience In Local Market

In this section, ask the vendor to its experience in the local market, including support for your state’s versions of electronic billing forms, interfaces with state systems, etc.
In this section, ask the vendor to describe its experience, current certifications, and plans to obtain certification and comply with the various Federal Standards for meaningful use of electronic health records and health information exchange.
In this section, ask the vendor to describe its experience with aiding behavioral health and providers with integrating with primary care providers through data exchange.
In order to evaluate vendors on the customer service dimension you will need a list of customer contacts.

To have a reasonable sample size, it is recommended that you request that vendors provide contact information for a minimum of 25 customers.

Ask the vendor to highlight some of those customers who are felt to reflect satisfaction with its products and services and/or those whose needs are most similar to those of your organization.
In this section, ask the vendor to detail the cost for its software technology solution.

The information should clearly distinguish between one-time and on-going costs and be complete enough (along with the information from the Technical Requirements section) for you to develop a three-year budget for the proposed solution.

Need to provide the number of users (named as well as simultaneous) for vendors to respond with cost information.
Include an optional section where vendors have an opportunity to share any other information they feel would be helpful to you in the selection process.
Appendices

- Functional Specification Checklist
- Pricing template (Excel spreadsheet)
- Customer Reference Information Form

Give the vendors 30 days to respond to the RFP.
Once you have received the responses from the software vendors, you can begin your evaluation process by scoring the vendors on how well they meet your functional needs.

Develop a preliminary three to five year budget for each of the vendors (including any required technology infrastructure upgrades and changes in staffing) so that you can begin to compare cost.
Screening From RFP Responses

- Determine if any of the knock-out factors apply
- Select a vendor to move to the software demonstration phase
- Most organizations find that they end up inviting six to ten vendors for half-day software demonstrations
• Develop some sort of Likert scoring tool for your staff to use during the software demonstrations based on the core areas of functionality laid out in your RFP

• The goal in this step is to narrow the vendors down to two to three finalists, based upon both functionality and user-friendliness

• In most instances, organizations come to a very quick consensus about finalists at this point in the process
I. STEPS FOR VETTING VENDORS & THEIR PRODUCTS & SERVICES:

Phase 3 — Vetting Finalists and Making Final Selection
A Structured Approach to Final EHR Demonstrations

• One or two day software demonstrations by your two or three vendor finalists
• Structured topics for the demonstrations with your staff subject area experts attending and scoring the vendors
Sample Final
Demonstration Schedule

Clinic Front Desk/Office Manager/Utilization Review (8:30 a.m. – 9:30 a.m.)
- Appointment scheduler
- Referral call tracking and intake
- Front desk - check-in, payments, account inquiry, next appointment
- Service authorizations
- Alerts & messages – insurance eligibility verification, authorizations, referral mgt., messages from billing staff, etc.

Billing/ AR (9:30 a.m. – 11:00 a.m.)
- Service entry / Service documentation interface from progress notes and other medical records documentation
- Billing rules and edit capabilities/billing logic – Payer and credentialing edits, unit-rate billing, “roll-up” billing, I/P versus O/P billing, DRG support, etc.
- Billing process – electronic and payer bills, including self pay statements
- Basic A/R functionality – payment posting (electronic and manual) rebilling, balance billing, contractual expenses, write-offs, etc.

IT Questions (11:00 a.m. – 11:30 a.m.)
- Creating and/or changing reports, forms (screens) and SQL databases within the system
- SQL database rights for queries and software performance reporting
- Local custom database changes and vendor software upgrade impacts
- Software maintenance contract contents and technical training provided?
- Discuss connectivity with other systems (SAGE ABRA, SAGE MIP, etc.) and what standards do you employ
- Discuss web hosting options
Lunch (11:30 a.m. – 12:00 p.m.)

Clinical Overview & Outpatient, Case Management & Medication Services (12:00 p.m. – 2:00 p.m.)
- Clinician Interface/Overview – caseload, alerts and ticklers, etc.
- Diagnostic/Assessment
- Treatment plan and multidisciplinary treatment team support
- Progress notes/Quarterlies/PCP communication
- Case management documentation supports and care coordination
- Discharge and aftercare planning
- Electronic prescriptions and laboratory ordering/results
- Mobile and field-based access (include discussion of partial or complete files for laptops or tablets)

Residential (2:00 p.m. – 4:00 p.m.)
- Bed management
- Ordering (including lab and pharmacy interfaces)
- Assessments (including nursing admissions forms, medical history, physical, etc.)
- Treatment plans
- Medication Administration Record (MAR)
- Discharge documentation and aftercare
- Other routine documentation – vitals, 15 minute checks, restraints and seclusion, routine medical record notes, etc.

Wrap-Up/Additional Management Questions (4:00 – 5:00 p.m.)
- State and other reporting
- Productivity, outcomes tracking and management
- Records Release
- Other questions
  - Discuss Meaningful Use status?
  - What most contributes to a successful implementation?
  - Please discuss what assessments are included (MINI, CANS, CANVAS, etc.)
Additional Vetting Of Vendor Finalists

- More reference checks & current customer site visits
- CEO & management team interviews
- Financial due diligence
II. CONTRACT NEGOTIATION: ENSURING BEST VALUE & PERFORMANCE
Once you feel that you have selected the best system available to meet your needs, you can move onto the process of finalizing a contract and beginning implementation. Some purchasers do this with the two finalists. Have the contract reviewed by your attorney before changes and requests are presented to the vendor.
Key Contract Areas To Review

- Contract term and termination clauses
- Ensuring that all agreed upon functional specifications are included
- Warranties & limitations
- Support and implementation details
- Software escrow
- Costs and cost increases
- Payment terms and timelines
Contract Negotiation Tips

- Present all major and minor contract changes requests along with any pricing changes in a single memo
- Determine must-have versus desired changes
- Keep in mind that you are building a long-term relationship – if both parties have clear, fair, and reasonable requests, the negotiation usually goes very quickly.
III. Quick Peek: Key Elements of an EHR Implementation
Four Groups Of EHR Implementation Tasks

Routine Elements
These are the typical elements of an EHR implementation that require time and focus, but are not complicated in and of themselves.

Complex Elements
These are the trickier areas of the implementation require much more attention and can be stumbling blocks if not managed carefully.

System “Freeze” & Final Preparation
These are all the final tasks and steps before going-live with the new EHR.

Expanding & Leveraging the EHR Implementation
These are the often forgotten tasks of continuing to implement other and evolving features of the EHR application to leverage the technology for all possible benefits.
EHR Implementation

**Routine Elements**
- Vendor training and implementation
- Hardware
- Data conversion

**Complex Elements**
- Workflows
- Clinical content
- System set-up
- Billing testing
- Reports
- Interfaces
- Meaningful use
- Mobile system use planning

**System Freeze & Final Preparation**
- Final workflow testing
- Training materials and execution
- Final go-live preparation

**Expanding & Leveraging the EHR Implementation**
- Implementing more features
- Leveraging data through business intelligence
- Additional clinical and analytic use
IV. Questions & Discussion
Askesis Development Group, Inc. is a leader in software solutions for the behavioral health, addictions treatment, and social services markets. Our flagship application, PsychConsult Provider® is an enterprise application and is designed to completely integrate organizations’ administrative tasks, clinical workflow and revenue cycle management. Seamless integration with HIEs, laboratory and pharmacy management systems is simplified with PsychConsult Provider’s standards-based interoperability engine. Available in 3 deployment options: Software as a Service (SaaS), Self-Hosted, and Mixed Mode – its architecture ensures flexibility in configuration and customization to fit each organization’s needs.

Beyond PsychConsult Provider’s functionality, Askesis complements its software solutions with comprehensive implementation, ongoing support, and technical services provided by dedicated staff that is experienced working with a broad range of organizations varying in size and complexity.

PsychConsult Provider is ONC-ATCB 2011/2012 Complete EHR Certified for both Eligible Professional and Eligible Hospital domains and CCHIT Certified® 2011 Behavioral Health Electronic Health Record (EHR).

For additional information, please visit our website at www.askesis.com or call 877-275-2341.