Guidelines for the Practice When Evaluating EHRs

I. 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” comparision, 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 such as a Functionality Matrix.
  - 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 practice 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 how easy a system allows you to document a visit, write a prescription, etc.

- **Make the Vendor Show You How the Software Does it:** “It can do that” is not good enough. Have the vendor show you or point you to a client using a particular feature or function.

- **Involve the Entire 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 participate in 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.

II. Conducting a Product Demo

- Use patient visit-based scenarios:
  - Multiple chronic conditions, e.g., diabetes and hypertension
  - Acute and chronic conditions addressed at the same visit
  - Different diagnostic and/or treatment needs
  - Utilize your own actual patient cases
  - Steer the demo to tricky situations you may have recently encountered

- Develop workflow scenarios:
  - Prescription refills/renewals
  - Lab results follow-up
  - Notification letters to patients
  - Group visits

- Ask data questions:
  - Identify all patients with diabetes who have not been seen in over a year
  - Notify all patients on particular medication, e.g., Vioxx
  - Find patients with a particular lab result, e.g., patients with 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**

Use the following checklist to help evaluate specific product functionality.

<table>
<thead>
<tr>
<th>Ease of Use</th>
<th>Workflow</th>
<th>Availability</th>
<th>Cost Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did the product perform the function intuitively and with ease?</td>
<td>How would this functionality be done?</td>
<td>Is this functionality available now?</td>
<td>Which product module includes functionality? Is it included in the quoted price?</td>
</tr>
<tr>
<td></td>
<td>By whom among practice’s current workflow?</td>
<td>Is it included in the standard product offering?</td>
<td>Is additional third-party software required? What is the associated cost?</td>
</tr>
<tr>
<td></td>
<td>Does it fit within practice’s current workflow?</td>
<td>Is customization required?</td>
<td>Is additional hardware required? What is the associated cost?</td>
</tr>
<tr>
<td></td>
<td>Are there impacts to the practice’s current workflow that represent major changes?</td>
<td>Who has to do the customization – vendor or client?</td>
<td>Is ongoing maintenance required? What are the associated costs? Who does the maintenance?</td>
</tr>
</tbody>
</table>

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**III. Conducting Reference Site Visits**

- Ask vendor for client list, especially those in same type of practice and contact the 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

- Bring practice staff along.

- Spend as much time as possible watching the system in use.

- Understand the motives of references for hosting visits.

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This document is provided as informational purposes only. This is reading material provided solely to give the physician knowledge about the activities and processes customarily involved with the evaluation of EHRs. This is in no way an endorsement of any particular product by MSSNY.