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[1]

Use the following checklist to help evaluate specific product functionality.

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

1 Adapted from "Electronic Health Record (EHR) Product Guide." Object Health. May 2005.

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.