Guidelines for Evaluating EHR Vendors

I. Before Looking at Vendors

- **Know your Priorities**: identify the problems and issues in your practice that the system needs to solve.
  - Assess the needs of providers and staff. (See Comagine Health's [EHR Personal Goals List](#), which may help providers and staff identify needs in their area) Summarize/prioritize the practice needs. (See Comagine Health's [EHR Practice Goals List](#))
  - Map your workflow and identify inefficiencies that can be addressed through an EHR. (Comagine Health can do this for you, see [Practice Workflow Assessment Guide](#))

- **Establish a Team**: to be responsible for evaluating systems.

- **Include Team in Evaluation Process**: Include representatives from all departments/areas to participate in product demos on the short list and allow them to weigh in on the final decision.

II. Moving from More Than 100 Potential Products to About Five

- **Examine "Review" Websites and Articles**: relating the results to your identified needs/priorities. Be aware of limitations of each source. Comagine Health can help you make sense of this information. Some potential sources of information include:
  - CCHIT certification. Choose from vendors that are certified by the Certification Commission for Healthcare Information Technology cchit.org/find/. These vendors must have a minimum level of functionality as determined by expert workgroups. Medicare and Medicaid incentives require your vendor be CCHIT certified.
  - The AC Group Rankings. AC Group publishes a detailed report on vendor PMS/EHR functional, usability, and company viability. See their report: acgroup.org.
  - KLAS research rankings. This report is based on user satisfaction results. You can get a free report by rating your current practice management system: klasresearch.com.
  - The American Academy of Family Physicians. AAFP also offers EHR resources: centerforhit.org.

III. Conducting a Product Demo

- **Establish a Process**: to allow you to evaluate systems in a more consistent manner, to more effectively make an "apples-to-apples" comparison, and to not be as easily distracted by sales pitches.

- Develop a standard set of attributes to evaluate and questions to ask.

- Use a scorecard or similar mechanism to consistently document your evaluation of vendors and systems based on priorities and system features/functionality.

- **Use a Patient Visit-based Scenario**: ask vendor to stick to one test patient for this portion of the demo:
  - Multiple chronic conditions, e.g., diabetes and hypertension
  - Acute and chronic conditions addressed at the same visit

Reimagining health care, together.

- o Different diagnostic and/or treatment needs
- o Utilize an actual patient you have had or use Comagine Health's example Sample Scenario.
- o Steer the demo to tricky situations you may have recently encountered

- **Look at All of Your Processes**: ask vendor to show you processes/tasks that occur outside of the patient visit:
  - o Prescription refills/renewals
  - o Lab results follow-up
  - o Notification to patients through patient portal, text, email or letter
  - o Scheduling, registration and billing functions

- **Ask Data Questions**:
  - o Identify all patients with diabetes who have not been seen in over a year
  - o Notify all patients on particular medication, e.g., Vioxx
  - o Find patients with a particular lab result, e.g., patients with LDL-C > 130 mg/dL
  - o Questions with multiple search parameters, e.g., patients with diabetes who within the past year have had a HbA1C > 9.0%
  - o The average HbA1C value for a provider's patients

- **Make the Vendor Show You**: "It can do that" is not good enough. Have the vendor show you or point you to a client using a feature or function.

IV. Contacting References and Conducting Site Visits

- **Find Reference Sites**: ask your Comagine Health liaison for a list of practices that use the top three products you have narrowed to and ask the vendors for a list. Note that the references from the vendor will likely be the most satisfied customers.

- **Find Those Most like You**: have your champion call the practices that are most similar to yours (size, specialties, problems and goals). If the clinic is cooperative, consider having other staff talk to their counterparts at the other practices (physician to physician, MA to MA, billing person to billing person).

- **Conduct at Least One Site Visit**: before conducting a site visit, it will be desirable to narrow to two vendors. If you have a top one vendor that you think is a much better match than your second, conduct a site visit for this vendor first. If the site visit goes well, you may choose not to conduct a site visit for your second choice. Choose practices that are most similar to yours (size, specialties, problems and goals). If you want to stay local, this may be difficult – it is worth traveling to do this!
  - o Bring practice staff along
  - o Understand motives of the reference site for hosting visits

- **Conduct a Structured Site Visit**:
  - o Establish overall goals
  - o Develop a set of questions to ask
  - o Identify processes and functions to observe
  - o Spend as much time as possible watching the system in use