Steps for Purchasing & Implementing
an Electronic Health Record System

Analyze Current Practices
- ❑ Use a workflow process review to assess what is effective and what could be improved
- ❑ Assess office practices which affect documentation

Research Software
- ❑ Understand the basic software functionality
- ❑ Identify ten ways that software will make you more efficient
- ❑ Get a sense of what a new software system will cost

Prioritize Software Requirements
- ❑ Identify the challenges you want software to solve
- ❑ Identify the shortcomings of current system(s)
- ❑ List the capabilities you want in an ideal system
- ❑ Review your list with coworkers to gather feedback
- ❑ Prioritize into "must haves" and "nice-to-haves"

Make the Case to Management
- ❑ Identify the decision makers whose approval you need
- ❑ Present the existing challenges and inefficiencies
- ❑ Detail how software will solve those problems
- ❑ Summarize the budget required for new software
- ❑ Get approval to proceed with your software search

Build a Short List of Software Vendors
- ❑ Determine which systems meet your requirements
- ❑ Determine which systems fall within your budget
- ❑ Contact a short list of up to five software vendors

Educate the Vendors on Your Project
- ❑ Share prioritized features list with vendors
- ❑ Tell the vendors what other systems you are evaluating
- ❑ Detail your selection process and timeline
- ❑ Explain what you expect from vendors during the process

Evaluate Live Software Demonstrations
- ❑ Set a date and time to demo each software system
- ❑ Invite the appropriate people to view the demo
- ❑ Use a "scorecard" to track your opinion of products
- ❑ Meet with your team after each demo to gather feedback

Rank the Software Systems
- ❑ Eliminate vendors that don't offer must-have capabilities
- ❑ Rank the remaining vendors based on functional fit
- ❑ Rank the vendors based on perceived ease-of-use
- ❑ Consider how well vendors handled the sales process
- ❑ Gather and Compare Price Quotes

Verify References and Vendor Viability
- ❑ Explain to the front runner that you are leaning toward them
- ❑ Ask for two references that share your specialty and size
- ❑ Ask each reference what they like and don't like about the system
- ❑ Make a site visit if possible to see software in action
- ❑ Ask references how the vendor responded to any problems
- ❑ Assess the vendor's financial and strategic viability

Gather and Compare Price Quotes
- ❑ Request a detailed price quote from the remaining vendors
- ❑ Provide necessary data for a price quote (e.g. user count)
- ❑ Ensure quotes are complete - software, service, training, etc.
- ❑ Compare all quotes on an apples-to-apples basis
- ❑ Request the vendors' software license agreement (SLA)

Review the Software License Agreement
- ❑ Ask for a discount in-line with industry standards
- ❑ Ensure you are buying licenses for all full and partial users
- ❑ Assess up-front versus ongoing license costs
- ❑ Ensure some sort of "out clause" if things go wrong

Implementation
- ❑ **Plan how, and when transfer to EHR will occur**
- ❑ **Purchase EHR software**
- ❑ **Install Software**
- ❑ **Train and Practice**
- ❑ **Go Live**