

# 10 Tips for Selecting an Electronic Health Record System

*These pointers are intended to help you navigate the complicated process.*



**D**eciding to use an electronic health record (EHR) system in your practice has many potential benefits, including facilitating integrated service delivery, accessing your patients' records from almost anywhere, and helping to optimize office efficiency. However, given the multitude of EHR vendors in the market, the selection process can seem daunting, even for those who are technologically savvy. This tip sheet is designed to help

you with the decision making process.

The following 10 tips touch on core considerations that individual and group practitioners should assess and discuss with colleagues as applicable when selecting and transitioning to an EHR system:

## 1 » PREPARE TO GET STARTED.

In starting the process, practitioners in settings of various sizes and types may find it helpful to familiarize themselves with the information and resources available at the [healthit.gov](http://healthit.gov) web site. Further, psychologists in group practices or organizational settings might consider forming an EHR advisory group that can help guide activities related to selecting an EHR. Advisory group members should work together to: identify any expected challenges (such as training and cost); review systems; and create new, standard operating procedures to follow when an EHR is fully implemented.

## 2 » MATCH SYSTEM OPTIONS TO YOUR PRACTICE SIZE.

Some EHR systems are designed to meet the needs of large practices and systems (for example, hospitals), whereas others are better suited for small groups or solo providers. Selecting a product that is appropriate for your practice size will help to narrow down the options – and avoid unnecessary cost.

## 3 » CONSIDER THE KIND(S) OF HEALTH CARE PROFESSIONALS IN YOUR PRACTICE AND WHAT THEY MAY NEED AN EHR TO DO.

Is your practice staffed solely by psychologists, or will other health care providers be using the EHR system? For instance, if you practice with health care professionals who can write prescriptions, electronic prescribing is a feature that you may want in your EHR. Also, some providers such as psychiatrists are eligible for federal health information technology (HIT) incentive payments to adopt EHRs. This eligibility may have a bearing on cost and other considerations during the selection process, depending on whether and with whom you share a practice.

The job functions of any staff in your practice will determine who should have particular levels of access to different parts of your EHR, including scheduling, billing and charting.

## 4 » DON'T REINVENT THE WHEEL: LOOK AT YOUR CURRENT SOFTWARE.

If you are already using office management software (OMS), contact your vendor to see if they have – or know of – an EHR that is compatible with their OMS product.

## 5 » CONSIDER YOUR FUNCTIONALITY NEEDS.

Beyond practice management functions like billing, scheduling and charting, what do you want the new system to do? Do you want it to provide for data segmentation? If you are storing psychotherapy notes in your EHR, be aware that the Health Insurance Portability and Accountability Act (HIPAA) stipulates that extra protection must be added for this information. In this case, you would want your EHR to have data segmentation capabilities. Do you want your EHR to offer “glass wall” features that will allow for other practitioners – within and outside your practice – to have access to patient information in an emergency? Other features, such as voice dictation, decision/diagnosis

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support tools, a web portal that enables patients to view their health records, and an internal email system might also be available.

Does the EHR meet various federal standards, such as HIPAA compliance and Meaningful Use Criteria? For the former, you want to ensure the utmost safety and security of your records. For the latter, if you meet these criteria, your practice may be eligible for federal HIT incentive payments. While psychologists are not currently eligible for these incentive payments, sharing a practice with other health and mental health professionals such as a psychiatrist or nurse practitioner may make your practice eligible.

### 6 » DETERMINE WHETHER YOU WANT A SYSTEM BASED IN YOUR PRACTICE OR A CLOUD-BASED SYSTEM.

Some EHRs hosted at your office require that you purchase additional hardware (for example, an upgraded computer and server) and use proprietary software to run the product. Other EHRs provide access to a cloud-based system that can be accessed from anywhere – including a work PC, tablet or even a smartphone. Be aware that proprietary systems tend to be more expensive, for example, if they require technical support from an expert outside the practice.

### 7 » MAKE SURE THE VENDOR IS CLEAR ABOUT ALL COSTS INVOLVED.

Many factors affect the cost of transitioning to an EHR, although not every EHR is accompanied by a hefty price tag. Each EHR vendor will be able to provide you with information regarding the following costs: fees for initial start-up costs (including software/hardware purchases and training); monthly subscription fees; how subscription fees are allocated (charged per provider or globally as a practice); and special à la carte options that can be added onto the software at your request.

### 8 » LEARN HOW VENDORS CAN DEMONSTRATE THEIR PRODUCTS.

After reviewing several EHR products while being mindful of the above considerations, begin contacting vendors in order to obtain additional information that may not be provided on their websites. Many vendors offer free product demonstrations over the Internet and

will be happy to walk you through their product.

If you want a more comprehensive overview of their EHR system and how the vendor intends to help you in the transition process, submit a Request for Proposal (RFP). Completing an RFP can be time-consuming for vendors, so be sure only to submit an RFP to companies whose products you are seriously considering buying. Knowledgeable colleagues may be able to suggest a sample RFP that you can customize for your practice.


### 9 » USE THE VENDOR SELECTION TOOL ON PAGE 11 TO HELP YOU COMPARE OPTIONS.

Given the range of considerations inherent in the EHR selection process, you might experience a sense of information overload. Use the selection tool on page 11 in order to rate and compare your top five vendors.

Check the website of Certification Commission for Health Information Technology (CCHIT) to determine whether a vendor product you are considering is certified by CCHIT.

### 10 » LOOK AHEAD TO TRANSITIONING TO THE NEW EHR SYSTEM.

Depending on the type of EHR you select, your transition experience will vary. For instance, many cloud-based EHR systems will help you to train your staff in the use of the new system remotely via a webinar. Alternatively, if you decide to purchase a server and host your own EHR, a vendor may send staff to train you and any employees in your practice. A related tip: Have one or two individuals in your practice designated as being in a “train-the-trainer” position. Typically, an EHR vendor will train you and/or an administrative staff member to teach others, including new employees, how to use the software.

For additional information about electronic health records, including recent articles and webinars, please visit the APA Practice Organization’s Practice Central website at [apapracticecentral.org](http://apapracticecentral.org). If you have additional questions regarding health information technology, you may contact APA Practice Directorate’s Practice Research & Policy Department at [pracresearchpol@apa.org](mailto:pracresearchpol@apa.org). 

# Electronic Health Record System Selection Tool

This selection tool allows you to compare system functionality, vendor services and support, and cost for up to five different EHR vendors in order to help you select the EHR that may best meet your professional needs.

**Directions:** List up to five vendors whose products you are considering. Review the glossary below to help you understand terms used in the tool. For each EHR vendor, place a plus one (+1) or a minus 1 (-1) for each item under “Functionality” and “Vendor Services and Support,” indicating whether a particular vendor meets or doesn’t meet your practice’s needs or preferences with respect to those characteristics. Calculate the total for these two sections by vendor.

For the “Cost” section, enter cost estimates as provided by the EHR vendor, and calculate the sum total.

Then place point totals from Functionality and Vendor Services and Support, along with the Cost total, in the final row in order to compare your results.

Vendor List

Vendor 1: \_\_\_\_\_  
 Vendor 2: \_\_\_\_\_  
 Vendor 3: \_\_\_\_\_  
 Vendor 4: \_\_\_\_\_  
 Vendor 5: \_\_\_\_\_

FUNCTIONALITY OF SYSTEM	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Vendor 5
Appropriate platform					
Segmentation options					
Modifiable templates					
Add-ons					
Appropriate for my practice size					
Compatible with existing OMS					
E-billing capability					
<b>FUNCTIONALITY TOTAL POINTS</b>					
VENDOR SERVICES AND SUPPORT	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Vendor 5
Onsite training					
Remote training					
Online help desk					
Phone support					
Onsite support					
Implementation support					
Company reputation/longevity					
<b>VENDOR TOTAL POINTS</b>					
<b>FUNCTIONALITY + VENDOR TOTAL</b>					
IMPLEMENTATION (Start-up and maintenance)	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Vendor 5
Initial hardware costs					
Initial software costs					
Annual license fee					
Monthly fee per user					
Monthly or annual support fee					
Annual software/hardware upgrades					
<b>IMPLEMENTATION TOTAL COST</b>					
<b>OVERALL TOTAL POINTS/COST</b>					

TERM	DESCRIPTION
Appropriate Platform	Software installed on computer in your practice versus a web- or cloud-based system
Segmentation Options	Can parts of the patient record be separated for increased privacy?
Modifiable Templates	Can fields be added/removed from the EHR (for example, prepopulated diagnoses or “canned” responses for Progress Notes)?
Add-ons	Voice recognition/transcription, auto-fill, etc.
OMS	Office Management Software (scheduling, billing, etc.)
Remote Training	EHR vendor trains psychologist via webinar, phone
Initial Hardware Costs	New computer(s), tablet, server, router, etc.
Initial Software Costs	Windows/Mac OS purchase, EHR software
Annual License Fee	Yearly, renewable fee in order to use the EHR
Annual Software/Hardware Upgrades	To keep up-to-date with security, other features