



10 STEPS

Find the Behavioral Health EHR That's Right for You

A simple guide to select a flexible and integrated behavioral health IT solution

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healthcare

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Determining the ideal EHR solution for your behavioral health, integrated care, and/or human services organization requires a thorough understanding of your clinical and operational needs not only today, but also tomorrow. This guide can help you find a flexible, integrated EHR platform that will take your organization through changes in industry, technology, regulatory and reporting requirements, consumer expectations, and more.

STEP 1

IDENTIFY YOUR NEEDS

Common behavioral health pain points

- Integration issues with other software or EHR and practice management (PM) systems
- Missing EHR functionality
- Challenges in staying current with regulatory and reporting requirements
- Software usability issues (slow speed, too difficult to use)
- EHR software does not work on mobile devices
- EHR is not configurable or does not integrate with other vital care services' data
- Dissatisfied with the type of systems architecture (web-based or client server)
- Software vendor not helpful
- Lack of scalability to expand or adjust according to business initiatives

Source: Guide to Replacing Your EHR or EMR System, 2021 National Center for Medical Records, <https://www.medicalrecords.com/emr-buyers-guide/guide-to-replacing-your-ehr-or-emr-system>





STEP 2

DO YOUR RESEARCH

- 1 Build a team**

Assemble a team to guide the selection process with representation from major areas of your organization and at various clinical levels. Include no more than seven members to make decision making easier.
- 2 Build consensus and choose potential vendors**

The selection team should meet to build consensus on which capabilities of a new EHR platform are most important to the practice. Next, choose at least four vendors that may meet needs identified by your team.
- 3 See solutions for yourself**

Watch demos online to preview each of the identified products. During the demos, each person should note the features they like and rank them based on how they'd help your clinic or organization.
- 4 Finalize your features**

Based on your research, finalize your list of key features and functions. The final list will help produce a more solid RFP. It will also help you gauge the overall market.

STEP 3

ESTABLISH A BUDGET

To determine a budget for your new EHR system, start by gaining a better understanding of the cost of your current system, as both a yearly cost and total cost of ownership over a set time period. Consider the cost of depreciation on equipment—servers, computers, and peripheral devices. Remember to factor in recurring costs of licensing your EHR software, as well as what you pay for IT support and system maintenance.

Balance cost against potential ROI

When budgeting for the new EHR system, in addition to the costs for software and hardware (or cloud-based hosting, if you select that option), you will need to factor in costs for implementation assistance, training, and data conversions as part of onboarding to the new system.

Cost factors, however, can be balanced against the potential for return on investment (ROI). If your new EHR platform allows for greater integration and configuration, you will likely save on labor costs.



STEP 4

DRAFT A REQUEST FOR PROPOSAL (RFP)

Be specific with your requirements for vendor proposals. The more clearly you outline your requirements, the better your responses will be.

Components of your RFP

An introduction – Provide information to the vendor about your organization and how you operate from a business perspective. Help the vendor understand the type of organization for which they are submitting a proposal.

Vendor profile – Ask each vendor to share basic information about their company and their EHR solution.

Requirements – Specify all the requirements you are looking for in your new EHR system. Requirements may be written in a question format. Use the answers to compare the offerings of competing vendors.

Timelines – Provide timelines for submission, review, and decision-making.

Cost – In addition to asking for cost data, ask vendors to provide explanations for these costs. Also ask about licensing options.

In a perpetual software license, software is installed and operated on hardware located onsite at the medical practice. As a licensee, you may be offered additional services, such as implementation, customization, training, maintenance, and technical support.

In a software-as-a-service (SaaS) model, the software is only available on a hosted platform, (“on the cloud”). Maintenance is included as part of the hosting cost, but there still may be separate implementation, customization, and training services offered.

Generally speaking, a larger upfront investment is needed for a perpetual software license. The SaaS model requires less front-end investment, but necessitates monthly payments.

Selection process – Include a brief summary of how you intend to make a final decision.

Additional RFP Tips

- The first page of your RFP should identify a single point of contact with an email address. Tell all vendors they will be disqualified if they communicate with anyone other than that point of contact or by any means other than the provided email.
- Ask vendors to provide 3–5 client references with a description of the products and services the vendor provided them.
- Do not share your budget information.

Source: <https://www.ehrinpractice.com/a-framework-cheat-sheet-for-your-ehr-rfp-295>

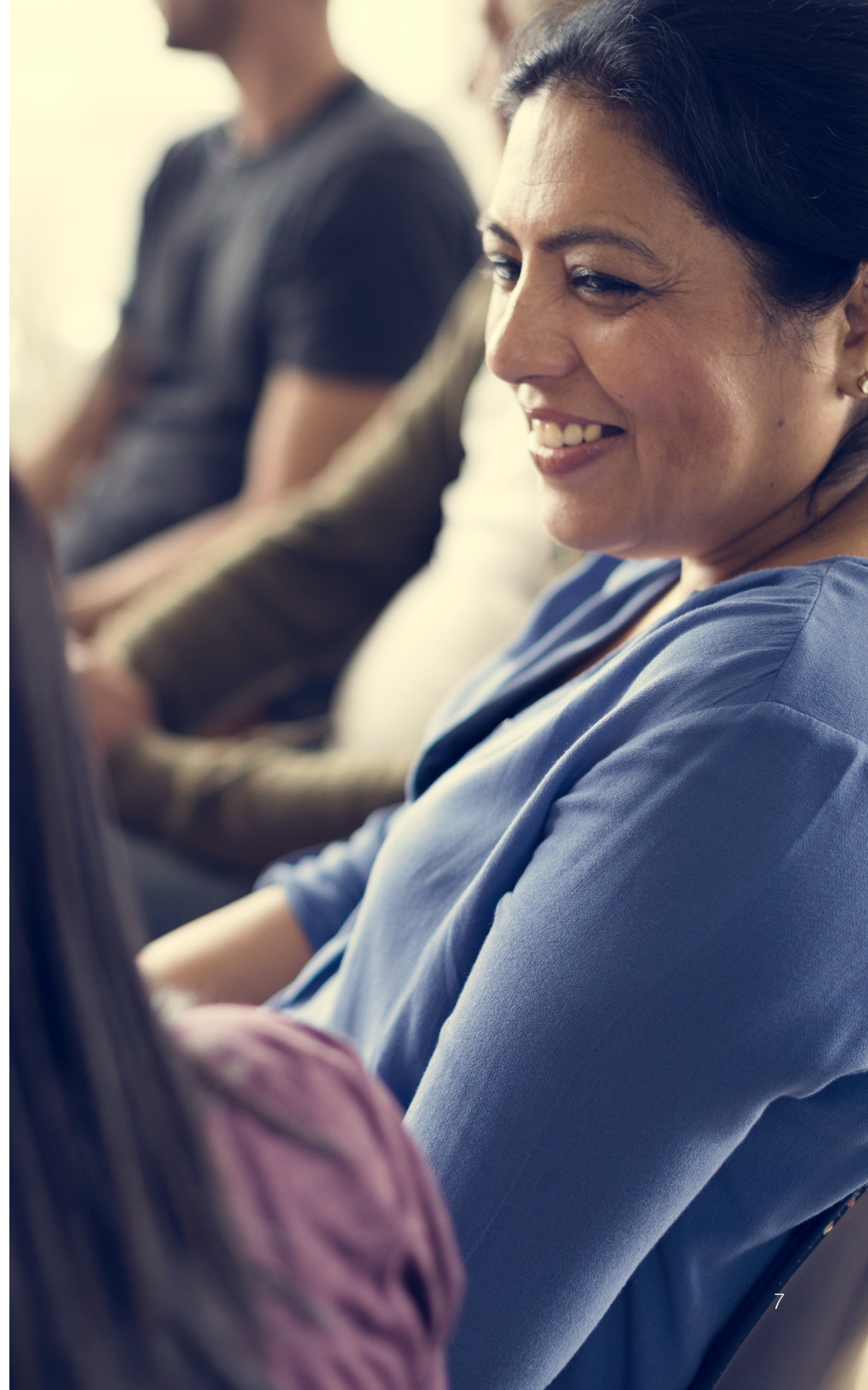
STEP 5

NARROW THE POOL

Evaluate each proposal with a weighted points scale. There are many ways to score vendors and the amount of granularity you apply is up to you. The important thing is that you employ some method to rank all RFP responses that will allow you to feel comfortable that the top few vendors do in fact offer solutions that meet your needs and are within your budget.

Once all team members have scored each vendor, use the average scores to select the vendors who will move forward. Three is optimal, as the next step requires significant resource commitments. Be sure to notify the vendors who will not be moving forward.

Tip — It's not uncommon to find that vendors who meet your needs are outside your budget, and vendors who are within your budget do not meet your needs. If you find yourself in this position, stop and do some additional analysis. Carefully consider your needs and decide whether they can be reduced or if your budget can be increased.



STEP 6

SEE THE PRODUCTS IN ACTION

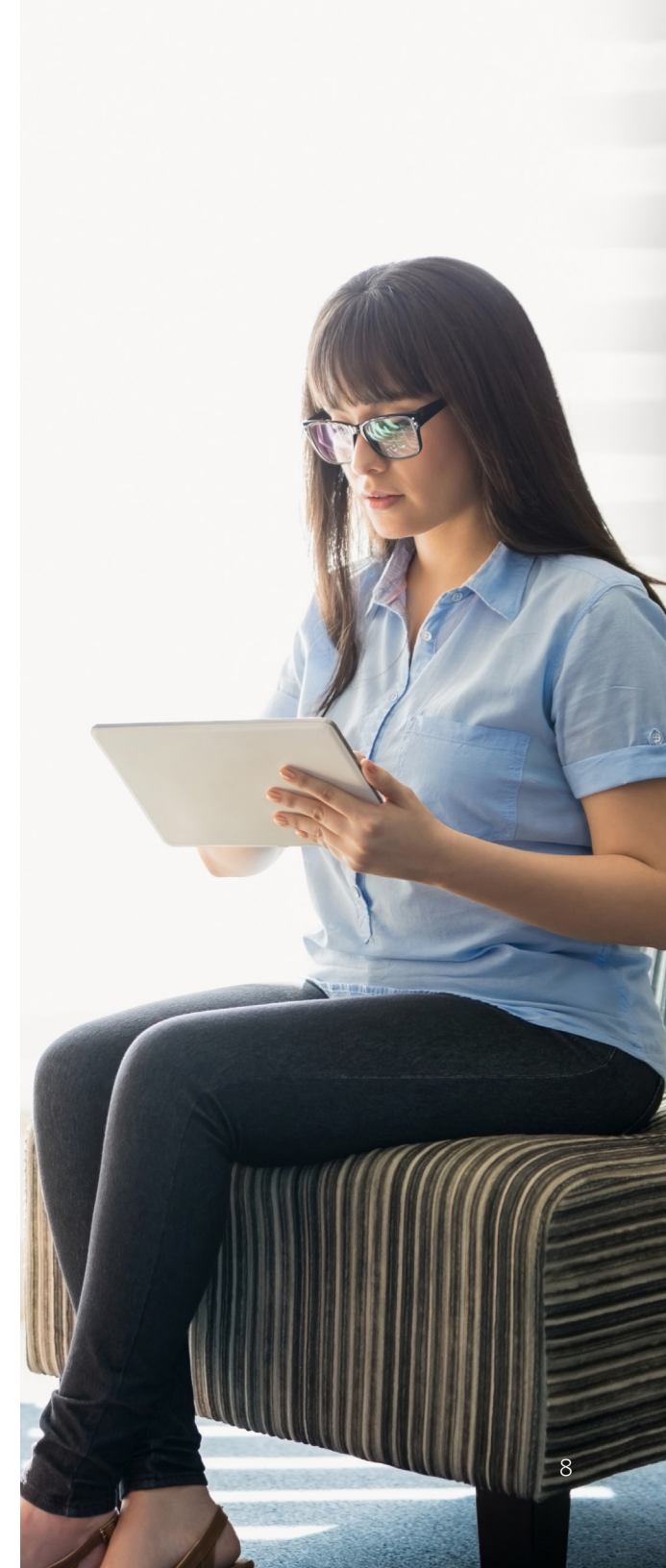
Schedule your top two vendors to conduct on-site presentations. Give them plenty of time (four-hour minimum) and prepare your team to rank every vendor's demo using the same scale. Tell vendors that they must deliver live demonstrations of their products—not slides or any other non-live presentation.

Break away from workarounds

Some organizations like vendors to follow scripts, however this limits vendors who may have creative ways of meeting your needs. It also tends to introduce limitations or workarounds from your current EHR into your selection of a new one. This tendency to carry forward current methodologies is one of your biggest risks now and during implementation. Remember, this is your chance to rid your organization of workarounds and take a fresh look at all of your operations.

Implementing a new system offers an ideal time to optimize your workflows. Be sure to take advantage of it.

Tip — During the live demo, require each vendor to add a new data element to an existing screen and create a new report using data from that screen. This will allow you to judge flexibility and whether your organization will be able to make changes or be reliant on the vendor for changes. The latter likely means you'll have to pay for any changes and fit your needs to the vendor's availability.






STEP 7

DISCUSS PARTNERSHIP

How you work with a vendor is as important as their product. During the on-site meeting, ask vendors to discuss the following:

Partnership Checklist

-  **Implementation methodology**
What is their project plan? How many hours do they expect the project to take? How is the work divided between the vendor and your group? How quickly does the project begin once a contract is executed?
-  **Data migration**
Do they migrate data from your system into theirs? How exactly do they accomplish this? How do they price it? What data elements are included? What data do they recommend, if any, that you pay to migrate?
-  **Training**
Do they provide professional training staff? What are their credentials? Will they come on-site to train, or do you go to them? What materials do they provide? What system do they use for training? Can they show you a training plan?



Proposal review

Ask the vendor to walk you through their proposal line by line and ensure you understand each charge. Confirm any additional costs not listed on the proposal. Have them describe and justify any costs that may change. Require they follow up by providing all of this information in writing within a week of the on-site meeting.



Get to know the vendor

The on-site demo is your team's chance to learn about the vendor face-to-face. This is your best opportunity to adequately evaluate the vendor before you make a decision, and your first opportunity to build a relationship.

You are seeking a partnership as much as a solution. Assess the vendor's willingness to engage in a long-term business partnership, as opposed to just making a one-time sale. What avenues of communication are in place if you need to seek support after the deal is signed? Ask the vendor what resources they offer to help ensure successful onboarding and ongoing use of their EHR solution. As your organization's needs evolve, what resources do they have in place to help you meet future challenges?

STEP 8

REQUEST BEST AND FINAL OFFERS

After reviewing 3–5 prospects, your team may already have a clear winner in mind. If so, move to the contracting step.

Communicate any additional requests for product or service features or changes to your expectations to your two prospects. Now that you've gained a better understanding of their terms for pricing, consider providing additional information that would help them refine their offer.

Ask both remaining prospects to submit a best and final offer. This gives them the opportunity to adjust their pricing and gives you a chance to get a better price.

Tip — Make sure both vendors are aware that there are only two finalists, and they are competing for your business with this best and final offer.



STEP 9

CHOOSE A PARTNER

By now, you may have one vendor who has earned the most votes from your selection team. If not, use price as the final criteria to select your vendor of choice.

Negotiate terms with this vendor until you either sign a contract or reach an impasse. Do not notify your second-place vendor of your decision until you execute a contract with your vendor of choice. Notifying a vendor of second-place status can cause difficulties should you later decide to work with them.

Tip — Be sure to check the client references provided by the vendor. Insights from the vendor's clients add real-world value to what you learned during your research. When you speak to these clients, be ready to ask targeted questions. This will help you better understand how they are using the EHR system.





STEP 10

REVIEW THE CONTRACT AND SIGN IT

Ask your chosen vendor to submit their final contract and software licensing and services agreement, as well as any other paperwork needed to finalize the purchase. Ask if there are any contracts and agreements for any third-party software necessary for the system to operate. You may need to review these agreements as well.

Get legal advice

Send the paperwork to your legal team or outside counsel for a careful review. Make any necessary changes recommended by your legal advisors and make sure they are acceptable to the vendor. You are entering into a long-term partnership, so you should understand everything in the contract and be comfortable with all of the conditions.

If you hit a critical impasse in your negotiation, let the vendor know that if you can't come to terms, you intend to move on to another EHR solution provider. Give them time to respond. If the impasse persists, you may need to switch vendors. If you are satisfied with the terms to which the vendor has agreed, execute the contract.

EXPLORE A SOLUTION BUILT FOR THE FUTURE OF BEHAVIORAL HEALTH

More than 400 behavioral health and integrated care organizations leverage NextGen Healthcare technology solutions to improve care coordination and clinical outcomes, reduce administrative burden and errors, improve financial health, and expand patient access and engagement.

- Report with autonomy and meet federal and state data reporting requirements
- Increase efficiency and mobile crisis team outreach by documenting on smartphones or tablets
- Facilitate better care coordination with streamlined interoperability
- Simplify care with one solution for mental health, addiction, human services, physical and oral health, and foster care
- Maximize financial performance and capture revenue at the lowest cost
- Save valuable time, build consumer engagement, and retain client loyalty with a patient portal
- Identify high-risk, high-cost clients with population health management

NextGen® Behavioral Health Suite supports a wide-range of vital treatment services, including:

- Outpatient and residential mental health and substance abuse services
- ASAM assessment, including Continuum® integration and CO-triage
- Opiate treatment program support
- Numerous screening tools and scales
- Methadone clinic support
- Targeted case management
- Peer support services
- Crisis mental health and behavioral health services
- Client-defined programs
- Robust behavioral health billing capabilities for residential, inpatient, and outpatient services
- Improved group scheduling functionality
- Out-of-the-box behavioral health reports and CCBHC quality measures
- Support for OBH environment payment and reduce burdens on staff

TAKE THE NEXT STEP.

Contact us at 855-510-6398 or results@nextgen.com

With integration, interoperability, and meaningful insights, NextGen Healthcare helps organizations make a more meaningful impact on individuals, clinicians, and your community.

The aim—to make health and care better,
for everyone.



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