10 STEPS

TO REPLACE YOUR EHR

Find the right solution for your orthopedic practice

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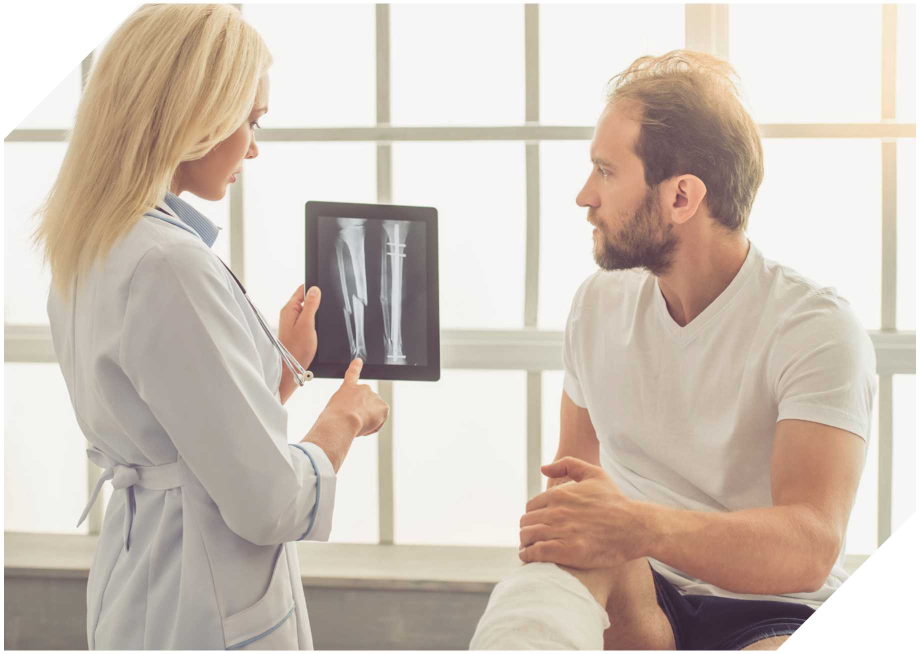


Whether looking to buy a new EHR, or consolidating EHRs to a single, integrated solution, this guide will help you in the process. Use these steps to find the best EHR for your billing, reporting, and orthopedic care needs.

STEP 1

CREATE AN EHR SELECTION TEAM

Form a team to guide the selection process with representation from every major area of your orthopedic practice —clinical, billing, technology (IT), and administrative. Include no more than seven team members to make consensus building and decision making easier.

STEP 2

DO YOUR RESEARCH

1. **Assess what's broken**
Ask the team to write down why the current EHR solution isn't working. In addition to stating problems with your current EHR, list pain points, missing capabilities, and preferred capabilities.

2. **Determine what you need**
Identify what orthopedic-specific capabilities the team agrees are most important and choose at least four vendors that may meet your needs.

3. **See solutions for yourself**
Schedule a demo to preview each of the identified products. During the demos, each person should note the features they like and rank them, considering how they'd help your group.

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.

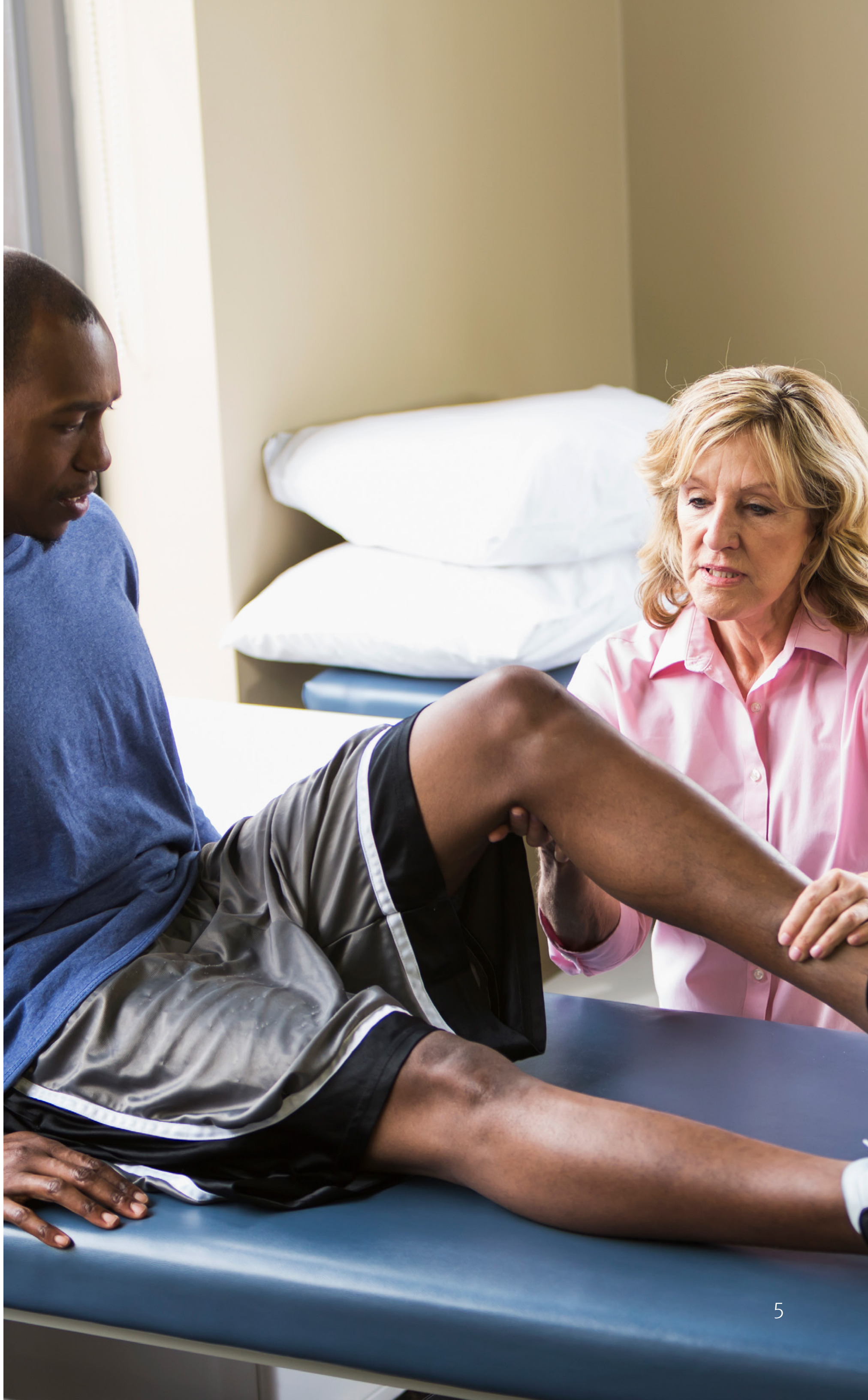
5. **Request a budgetary proposal**
Ask at least three potential vendors to provide a "budgetary proposal." Provide them "worst case" numbers so you receive a cost figure your purchase should not exceed. This ballpark amount should be on the high end to help ensure you don't under budget. This also tells you something about the vendors; if they're not willing to provide a budgetary proposal, this may be indicative of larger pricing issues that will surface later. This minor investment of time will provide you a more accurate budget estimate.

STEP 3

VERIFY FUNDING

Ensure you have necessary organizational and budget approvals. Based on the previous step, you should have a budgetary proposal from several vendors. Use the highest figure you received; it is far better to over budget than to under budget.

Make sure your practice is willing and able to spend the money represented by the highest vendor proposal.



STEP 4

DRAFT AN RFP

Draft your requirements for vendor proposals (RFP) considering how you will score vendor responses. The more information you provide to vendors, the better they can design a solution to meet your needs; and the better their responses, the easier it is for your team to evaluate options. Do not share your budget information.

Ask vendors to explain how their solution will help you

Ask vendors to describe specifically how they will meet each requirement. Inform them that their RFP response will be incorporated into the final contract. Your proposal should require vendors provide three to five client references with a description of the products and services the vendor provided them.

RFP templates are available online. Regardless of which RFP format you choose, the first page 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.

Give vendors a few weeks to digest your RFP and submit questions. Aggregate their questions and send the answers to all vendors.

Tip — Require vendors to indicate what would cause any cost changes, and how such changes would be reflected in your contract and invoices. Licensing typically accounts for the largest percentage of cost, so make sure they indicate why and how license costs could change. Also ask them to explain why and how proposed service hours might change as well as your commitment to purchasing service hours (i.e., Are you locked into the hours proposed?).

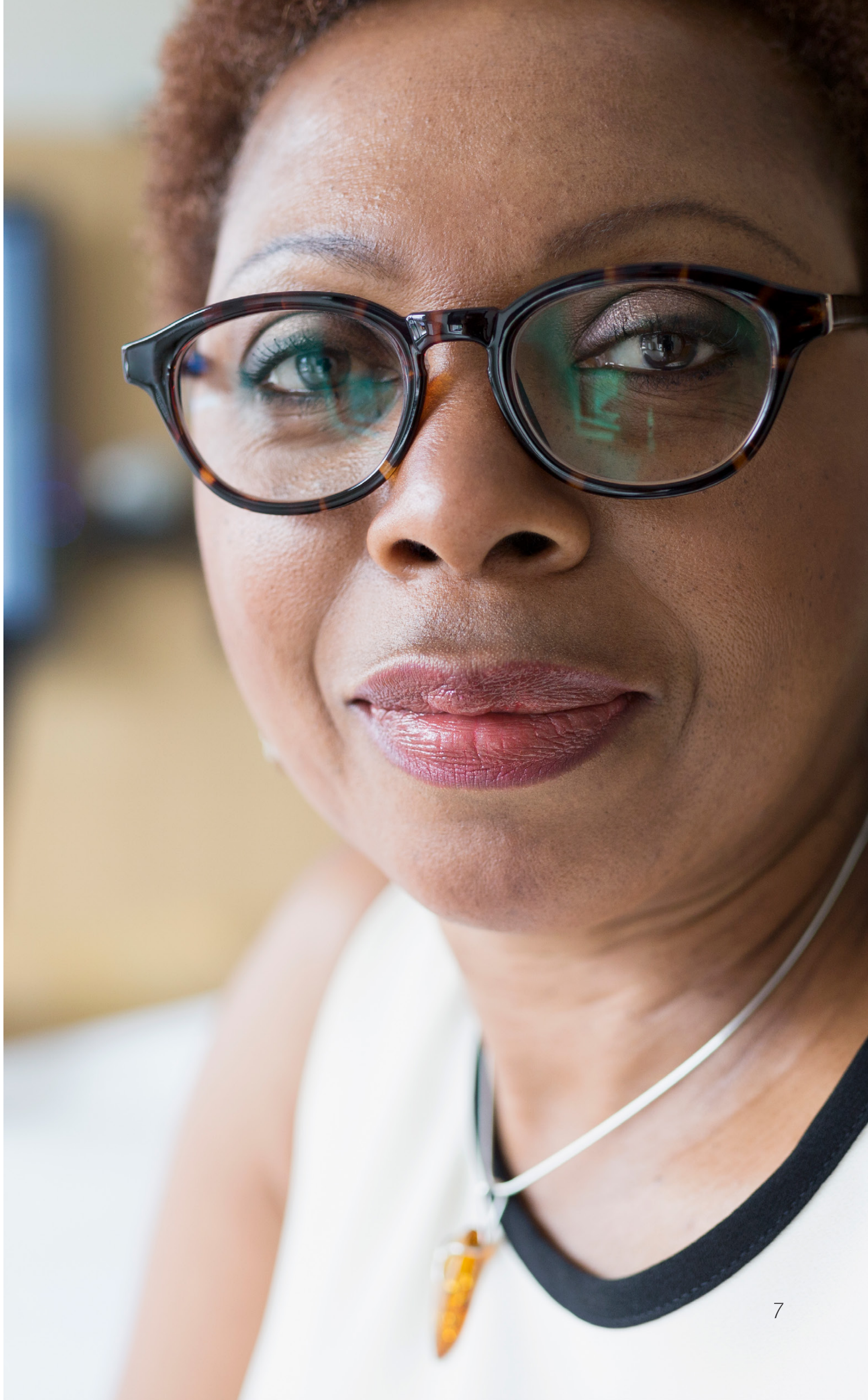
STEP 5

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. Set the expectation with vendors for live demonstrations of their products—not slides or any other non-live presentation. Drop vendors who do not have an actual product to demonstrate.

Break away from workarounds

Some groups 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 ("this is how we do things") into your selection of a new EHR. This "carry forward" of current methodologies is one of your biggest risks now and during implementation. Remember, this is your chance to rid your group 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 group 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. Remember you are seeking a partnership as much as a solution. On-site demos are a significant investment for the vendor as well, so they should be willing to provide you with any information you want.

STEP 8

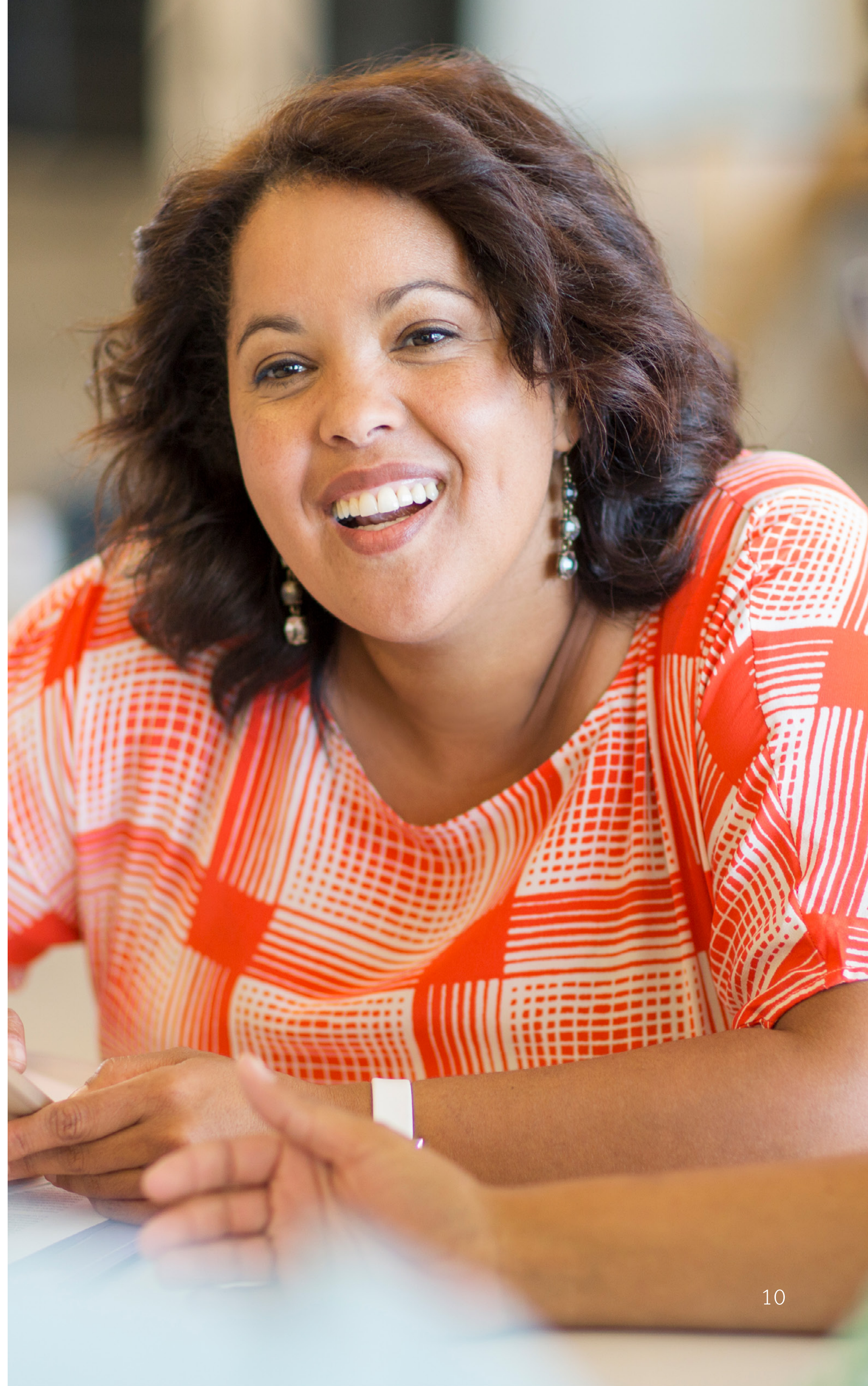
REQUEST BEST AND FINAL OFFERS (BAFO)

Your team may already have a clear winner in mind at this stage. If so, move to the contracting step. If not, you should now convey any new, removed, or changed needs or expectations to your two prospects.

With a better understanding of their pricing methodologies, you can provide additional information that would allow them to refine their quantities for licensing or services.

Ask both remaining prospects to submit a BaFO. 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 BaFO.



STEP 9

CHOOSE A PARTNER

You should now have one vendor who has earned 75% or more of your team's votes. If not, simply use price as the selection criteria. Move forward with your vendor of choice (VoC) 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 VoC. Notifying a vendor of their second-place status can cause difficulties should they become your VoC.

Tip — Be sure to check the client references the vendor provided. Although client insights can be helpful, they play a minor role in the evaluation of a vendor's capabilities.

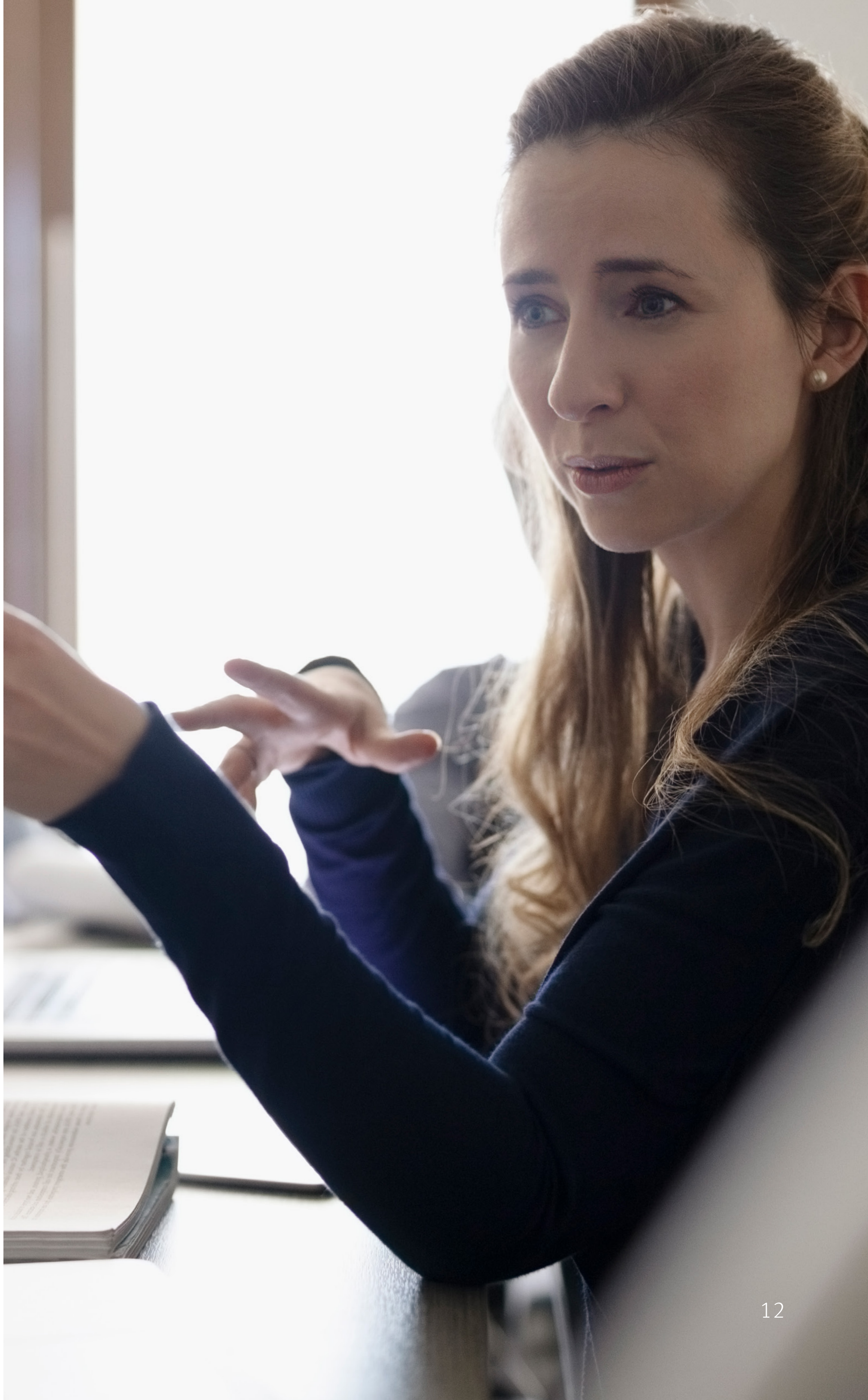
STEP 10

REVIEW THE CONTRACT AND SIGN IT

Ask your chosen vendor to submit their final contract and software licensing and services agreement (SLSA), as well as all paperwork to finalize the purchase. Inquire about any third-party software that is necessary for the system to operate.

Get input from legal

Send the paperwork to your legal team and/or outside counsel for a careful review. Make any necessary changes. 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, let this vendor know you intend to move to your other vendor and begin negotiations with them. Give them time to respond, but if the impasse persists, take action. If you are satisfied, execute the contract.



Choose a partner you can count on

It's a big undertaking to switch EHR vendors. That's why it's important to choose a vendor who can not only meet all your needs now, but who will be a partner alongside you as those needs evolve.

NextGen® Enterprise EHR offers a comprehensive care solution. Our solution includes all the productivity tools and reporting capabilities organizations need, and we invest in our solution to continually meet industry changes.

Achieve better clinical and financial outcomes with a truly integrated solution for orthopedic healthcare.

NextGen® Orthopedic Suite

- Document patient care from intake through charge creation
- Gain efficiency in the documentation of orthopedic-specific HPI's, physical exams, and assessment & plan
- Manage surgery scheduling process with workflow designed for the orthopedic practice
- Complete an entire clinical viewing and reporting workflow in your EHR with image-enabled orthopedic integrated PACS

Mobile documentation options

NextGen® Speech-to-Text
Automatic voice-to-text technology captures dictation and converts it to text immediately.

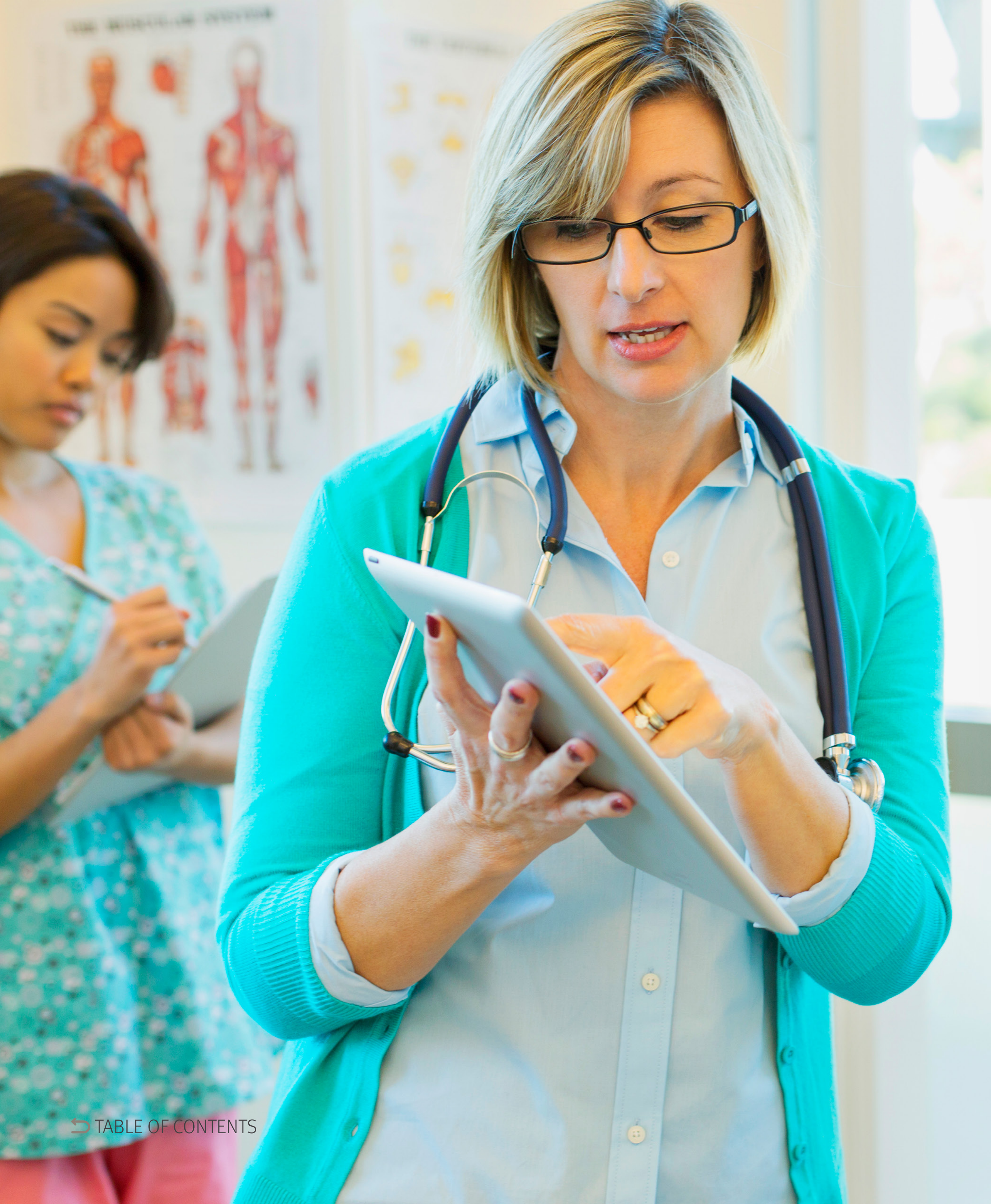
NextGen® Virtual Live Scribe
Ease workloads, increase productivity, and reduce the documentation burden to almost zero.

NextGen® Remote Scribe Services
Using a fully HIPAA-compliant process, a professional scribe listens to the mobile dictation and documents the patient encounter.

NextGen® Transcription Services
This flexible option allows physicians to complete their dictation before the next encounter.

NextGen® Direct-to-Desktop
A smartphone can act as a wireless microphone to allow physicians to use their voice to enter information into all text-based fields in the EHR.

These robust solutions are ideal for orthopedics, rehab therapy, speech therapy, chiropractics, sports medicine, and more.



Spend less time documenting care

Allow orthopedists to document away from the EHR with NextGen® Mobile Solutions. Eliminate after-hours charting with this user-friendly, cloud-based platform.

Increase productivity and decrease stress

Flexible and cost-effective documentation solutions help keep clinical encounters focused on patients rather than computer screens.

EHR and practice management integration

Marrying the right EHR with the right practice management system enables practices to automate reports and statements, billing, claims, collection, recall letter generation, eligibility and claim status requests, all in one place.

NextGen® Enterprise PM automates routine processes and integrates all aspects of running your practice. You can achieve your business goals faster while freeing your staff to focus more on patients. This solution also facilitates data sharing, helps catch and fix claim errors quickly, and streamlines patient scheduling and registration.

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TAKE THE NEXT STEP.

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

Empowering the transformation of orthopedic healthcare.

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