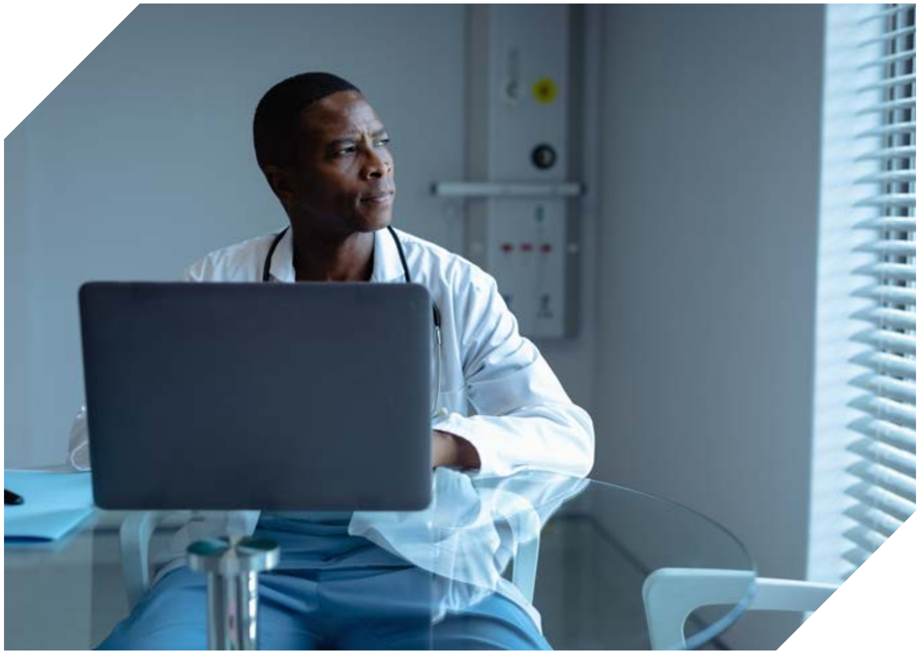
9 STEPS

Identify the EHR That's Right for Your Practice

A guide for independent healthcare providers

nextgen healthcare

TABLE OF CONTENTS



Healthcare delivery is changing, and the technology that has enabled providers to offer a virtual, contactless experience is here to stay. An integrated solution that fosters convenient care delivery, takes advantage of existing and available technologies, and aligns well with your existing workflow can offer patients the access they need now and sets your practice up for a more successful future.

Whether you're looking to buy your first EHR, seeking to replace an existing one, or consolidating EHRs to a single integrated solution, this guide will help you with the process. **Use these nine steps to help you find the best EHR for your billing, reporting, and patient care needs.**

YOUR SELECTION TEAM

A good EHR platform impacts every part of your practice. So shopping for a new EHR platform is a decision that you should make together. Be sure to include members from your clinical, billing, and office management teams, and aim to have 3-4 team members involved.

STEP 2

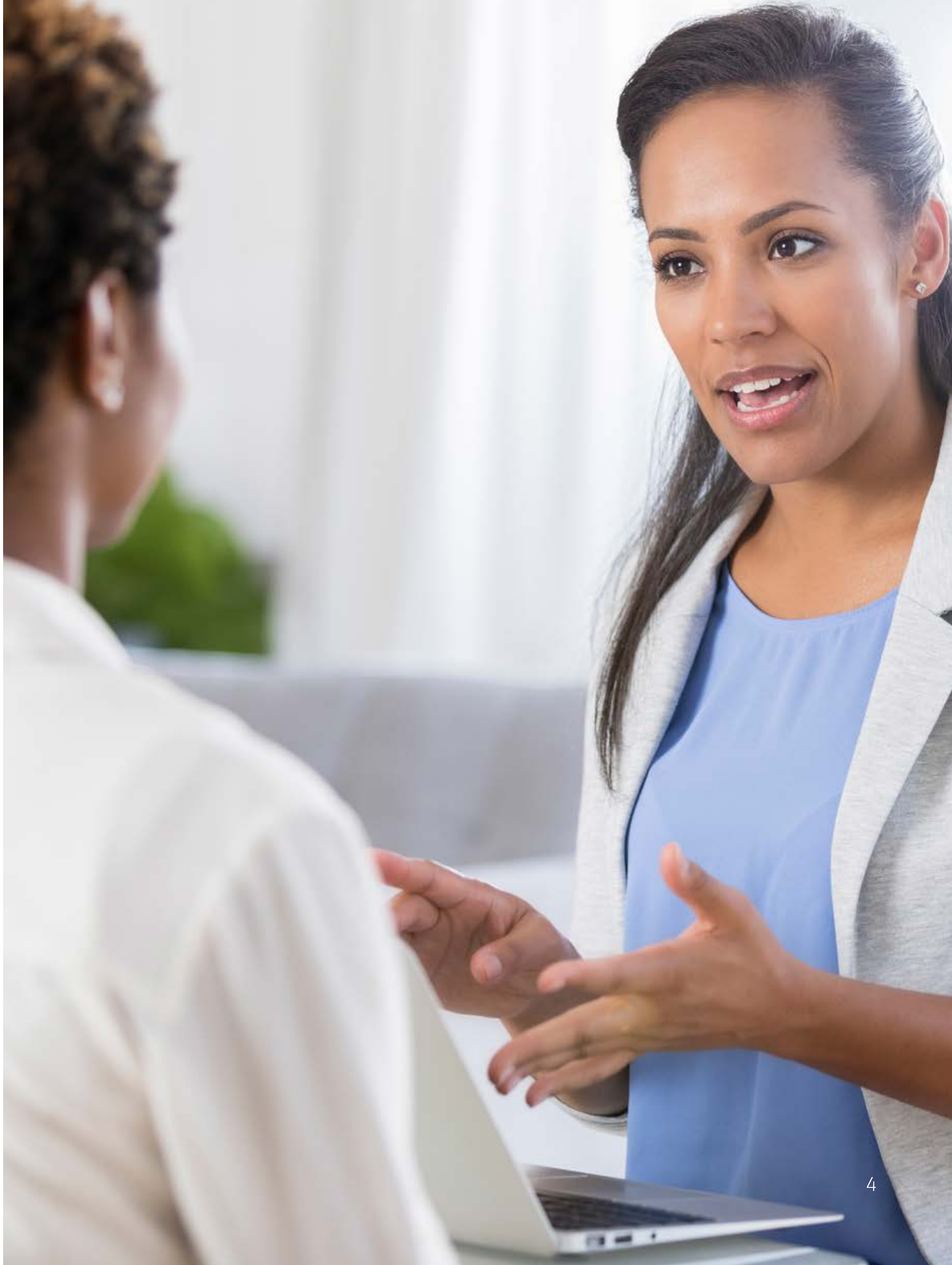
DO YOUR RESEARCH

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 capabilities the team agrees are most important and choose at least four vendors that may meet your needs.

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, 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 request for proposal (RFP). It will also help you gauge the overall market.

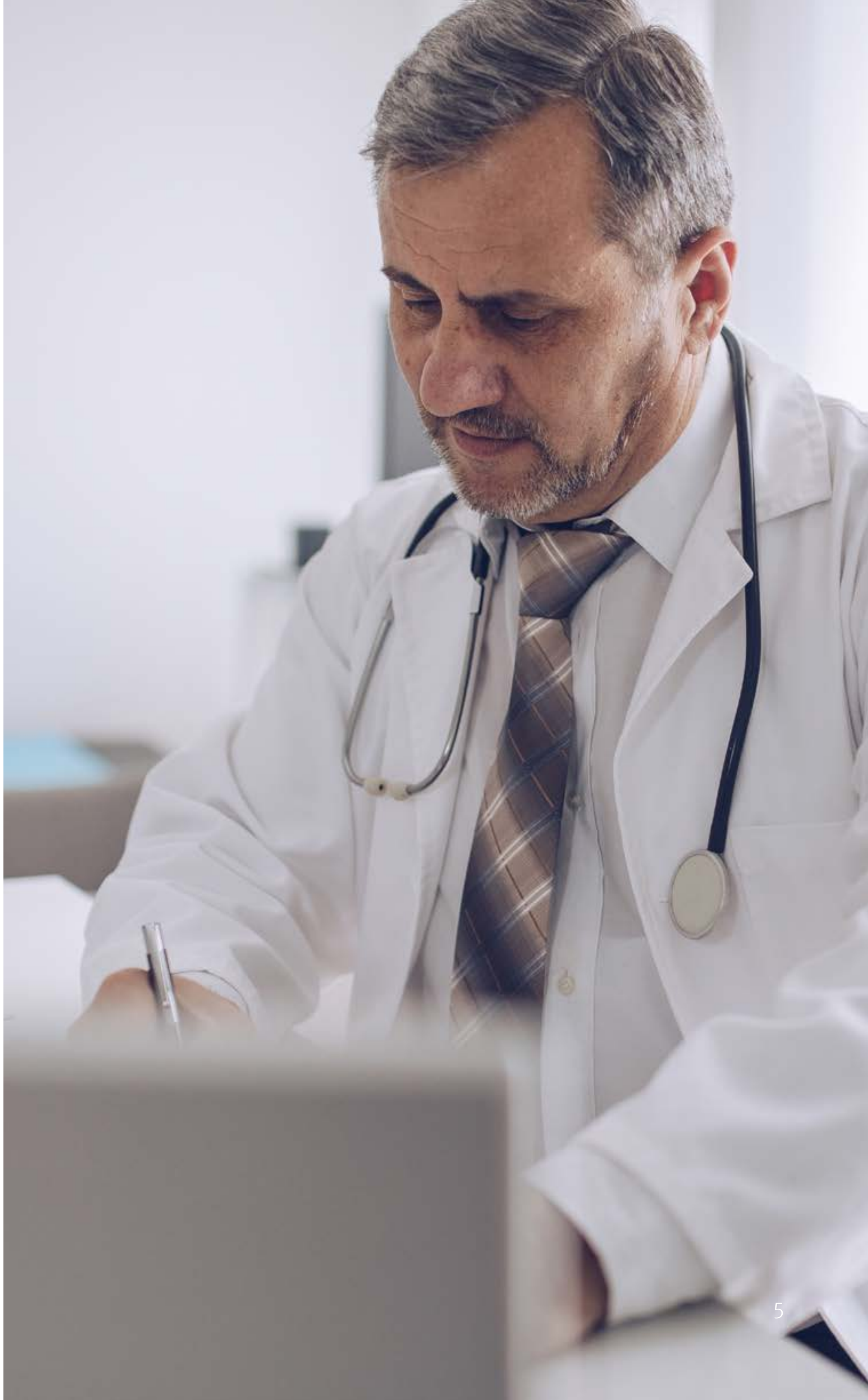


STEP 3

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. Consider the cost of hosting data locally on your own hardware and the IT costs that may accompany it for maintenance and data recovery. Remember to factor in recurring costs of licensing your EHR software, as well.

When budgeting for the new EHR system, you'll need to factor in costs for implementation assistance, training, and data conversions as part of onboarding to the new system. For instance, if your IT budget is of concern, you may consider choosing a cloud-based EHR that eliminates your need for in-house IT.



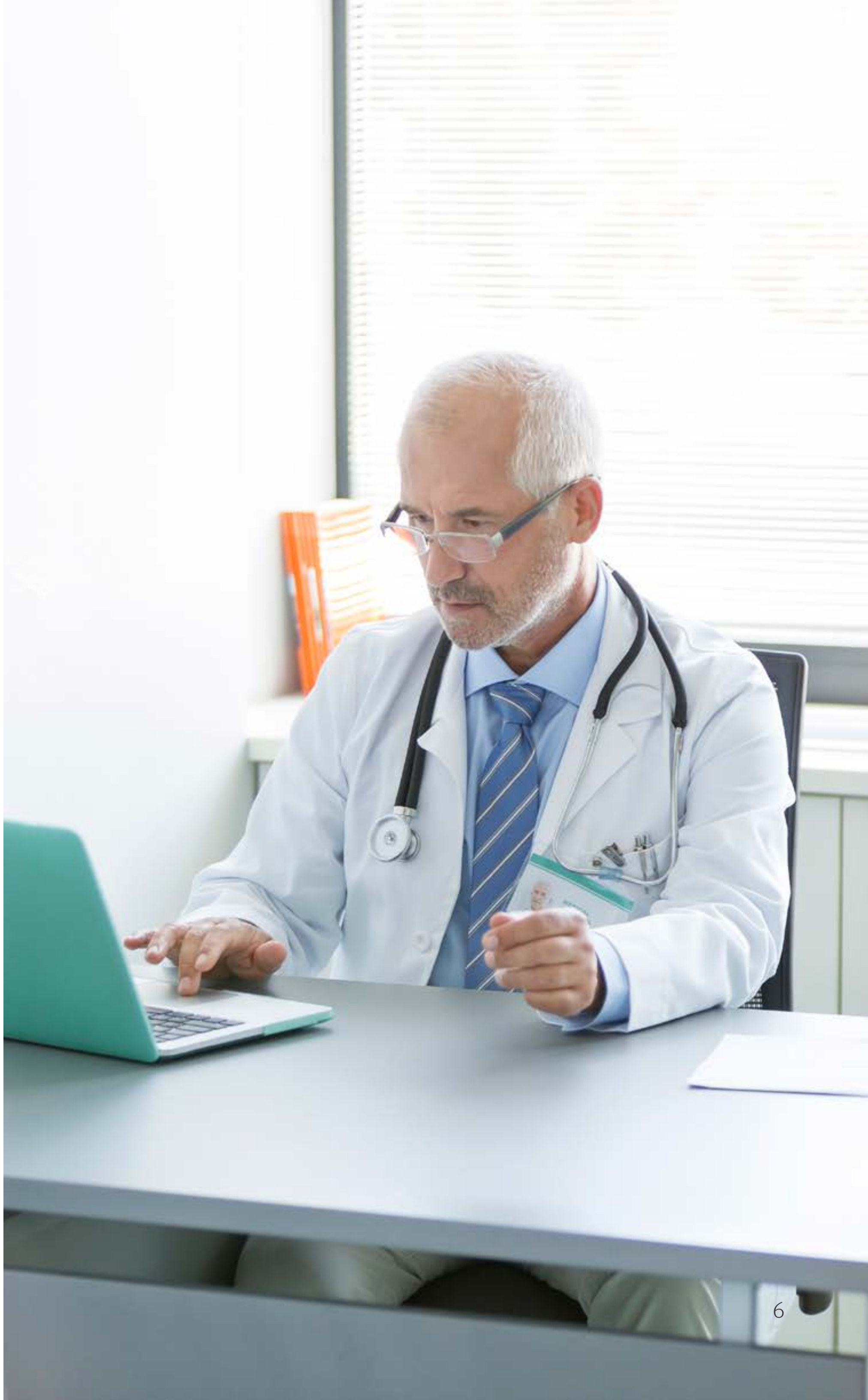
STEP 4

NARROW THE POOL

Evaluate each proposal with a weighted points scale. There are many ways to score vendors and the amount of detail 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 meet your needs and are within your budget. If you find yourself struggling to find an in-budget vendor that meets all your needs, carefully revisit your cost and vendor expectations to decide what can be adjusted.

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 that vendors who meet your needs are outside of 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 5

SEE THE PRODUCTS IN ACTION

Schedule your top two vendors to conduct an on-site or virtual presentation. Give them plenty of time (two-hour minimum) and prepare your team to rank every vendor's demo using the same scale.

Set the expectation with vendors for on-site or virtual demonstrations of their products. Remove vendors who do not have an actual product to demonstrate from consideration.

Break away from workarounds

Implementing a new EHR is an ideal time to optimize workflows. When meeting with your prospective vendors, be sure to discuss creative ways of meeting your unique needs without simply introducing workarounds.

This allows you to implement new, efficient workflows into your operations and avoid perpetuating the downsides of your current EHR.

Tip — During the demo, ask 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 practice 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 or adapt your needs to the vendor's availability.

STEP 6

DISCUSS PARTNERSHIP

How you work with a vendor is as important as their product. During the on-site or virtual 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, do they provide virtual/remote training, or do you have to 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. Ask them to provide all of this information in writing within a week of the on-site or virtual meeting.

- **Get to know the vendor**
  The 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. Demos are a significant investment for the vendor as well, so they should be willing to provide you with any information you want.

STEP 7

REQUEST BEST AND FINAL OFFERS (BAFO)

After reviewing your remaining prospects, your team may already have a clear winner in mind. If so, move to the contracting step. If not, narrow the field to two vendors using a team vote, demonstration rankings, or pricing.

You should now convey any 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 provides 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 8

CHOOSE A PARTNER

You should now have one vendor who has earned 75 percent or more of your team's votes. 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.

STEP 9

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 outside counsel for a careful review. Make any necessary changes. You are entering into a 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.

Discover a comprehensive care solution

It's a big undertaking to implement a new EHR system. That's why it's important to choose a vendor who not only meets your needs now, but who will be a partner alongside you as those needs evolve.

NextGen® Office is a an all-in-one cloud-based EHR, patient portal, practice management, and claims clearinghouse ecosystem. It can help you maintain and grow a successful, independent practice. In addition, NextGen Healthcare has multiple partnerships that add even more functionality.

NextGen Office works on any device or platform, so you can work from anywhere with an internet connection as well as chart at the point of care. Turn any computer, tablet, or laptop into a working extension of your practice. NextGen® Office Ambient Assist securely converts natural patient-provider conversations into structured SOAP notes directly in your workflow. This use of ambient listening AI saves you up to two hours per day.

NextGen® Office

EHR with intuitive workflows

Keep your focus on patient care with easy-to-follow workflows that reduce time spent on documentation. You'll find extensive clinical content at your fingertips. Benefit from a cloud-based EHR that includes e-prescribing, connections to major labs, consolidated patient data, billing, native ambient listening (AI) documentation, telehealth, and reporting. NextGen Office is touchscreen-enabled, ONC-Certified, and HIPAA-compliant.

Integrated practice management platform

Simplify scheduling and appointment reminders. Verify patient eligibility in real-time. Reduce rejections, denials, and overlooked claims with easy-to-use, streamlined billing and reporting so you can capture more payments in less time.

Embedded patient portal

Enhance staff efficiency and increase patient engagement with online scheduling, appointment reminders, virtual visits, online payment, and medication refill requests.

Free training and support

No hidden charges added for training or support your practice needs to get up and running. We'll help you tailor the system to provide the tools your team is looking for to meet your practice's needs.

Built in tools for communication and outreach

Send text and email appointment reminders, direct messages, and e-faxes. Virtual visit capabilities also enhance patient-provider communication.

Easy-to-use reporting and analytics

Improve compliance with MACRA/MIPS reporting. Access detailed practice-wide financial analytics and business intelligence.

KLAS RESEARCH | KLAS Small Practice Ambulatory EHR/PM Report | September 2024

High Trust in Improving Workflow Efficiency

"Gone were the fax machine, prescription refill paper messages, phone insurance verification, calling patients with lab results, and decreased productivity dealing with buggy software integrations."

Glenn Orsak, MD
Friendswood Family Medicine

TAKE THE NEXT STEP.

Contact us at 877-523-2120 or ngosalesteam@nextgen.com

We understand the challenges you face amid evolving regulations, shifting staff and care delivery models, and maintaining the financial health of your practice. Achieve your clinical, operational, and financial goals with NextGen Healthcare.

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