

**Making the Most of Your Investment:  
Guidelines for Successful EMR  
Selection and Implementation**

BY ROBERT SKOG AND JOEL S. DUHL, M. B. A.

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**E**lectronic Medical Records (EMR) will probably be the most expensive, practice-altering initiative you ever tackle. Depending on the size of your practice and the system that you purchase, you will spend large sums of money on the front end for license fees, implementation, training, equipment, and data conversion. On an ongoing basis, you will spend thousands of dollars on system and equipment support, additional license fees, and system upgrades. EMR, if properly implemented, will require that you and your staff change the way you process and store medical records.

An EMR system is nothing like the practice management system

you may have purchased in the past; the responsibilities related to a practice management system could be delegated to non-medical personnel. An EMR system will require active physician participation or it will not work.

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*So is it worth the investment?*

Yes, but only if you do it right.

A fully integrated EMR system will provide you with access to your patients' up-to-date medical infor-

mation 24 hours per day. The EMR may provide more accurate coding if the system is integrated with your practice management system. An EMR system may also enable you to create greater efficiencies in your office:

- Reduction in clerical costs related to transcription
- Completion of medical charts in a more timely manner
- Reduction in the time to find patient charts and diagnostic test results
- More efficient and less time-consuming processing of prescriptions
- Easier and more complete referrals to other physicians
- Patient access to self-help via the Internet, reducing calls to your practice

## **What Are You Trying to Accomplish?**

Choosing the correct system for your practice will take time and commitment. The practice should consider the reasons it has elected to purchase an EMR system and what the practice providers and staff want the system to do for them. For example, do you really want to install an EMR system? Or are you doing this because you see your peers taking the plunge? Do you want the system to integrate with your billing system or do you want a system solely for the management of your medical records? Are you willing to spend the time to set up "templates" (the algorithms

that each physician must establish for his/her practice that drives the EMR system) and/or initiate voice recognition features to make the system more operational? Do you want to fundamentally change the way you conduct your business, or do you merely want to save records electronically?

It all comes down to this: *the system will only work if you clearly define your desired outcome, and if all medical professionals will participate in the process.* Are you and the other physicians in your practice willing to take the considerable amount of time required to investigate and implement an EMR system?

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**SPEND TIME ON THE VENDOR'S IMPLEMENTATION PLAN AND ENSURE IT IS COMPLETE WITH REGARD TO SOFTWARE INSTALLATION, DATA CONVERSION, INTERFACE DEVELOPMENT, TRAINING SCHEDULE, AND IMPACT TO THE BUSINESS.**

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### Choosing a System

The process to follow in choosing the system includes a number of tasks that will lead you to a final decision. The practice should consider getting outside help if physicians and staff do not have the time and/or expertise to follow through the process. The process can follow these steps:

- Conduct interviews with key medical and office staff to identify the practice's operating procedures and workflow. During this process, match the capabilities of an EMR system with the practice's needs. EMR systems will have many capabilities. EMR vendors continually add functions and reports to meet market demands, individual practice requests, and unique specialty needs. The practice should critically analyze which functions and reports they will actually use. For example, in consulting with practices, we have found that many of them purchased practice management systems based on the system's abil-

ity to track reimbursement and produce sophisticated management reports. However, these practices only used the system for scheduling and printing and/or transmitting patient bills. So they paid for something they didn't use.

- Interview your in-house or local IT computer support person to develop the inventory of existing computer hardware and networking devices and to ensure the practice captures information on all of your information systems.
- Determine what you can afford to spend.
- Prepare the "Request for Proposal" for submission to vendors that includes:
  - A detailed process definition for all aspects of the patient encounter: patient registration, vitals, exams, orders, telephone triage, hospital/nursing home visits, referrals, billing, co-pays, and scheduling. This will include identifying the location of equipment that will be used by those processes.
  - A detailed function and feature list that will be used to identify the needs of the practice.
  - A detailed list of interfaces to internal and external systems such as equipment and laboratories. For each interface, identify the data, frequency, direction of feed (for example, patient demographics will be fed *into* the EMR system), and backup procedure if the automated interface fails.
  - Detailed requirements for data conversion and scanning (types of records and number of records).
  - An inventory of existing computer and laboratory equipment so that the vendors can notify the practice of any incompatibilities with their system.

- Do your homework. At this point the practice should begin determining the EMR vendors it will consider for selection. According to various independent rating services, there are more than 300 EMR vendors. Therefore, the practice will need a screening methodology to determine a manageable number of EMR vendors to investigate. A Web site search of the various systems may be helpful. You may want to consult sites such as <[www.acgroup.org](http://www.acgroup.org)> or <[www.healthcomputing.com](http://www.healthcomputing.com)>, both of which rate systems annually. Contact your specialty association for recommendations of systems that are particularly friendly to your specialty or ask other physicians who have implemented an EMR system about their system and experiences.
- Send your request for proposal to the vendors you have selected.
- Arrange for Internet demonstrations to get an idea of how the system functions.
- Select the final two or three vendors by researching the vendors' customer support procedures, system architecture, financial stability, system backup and retrieval, vision, and cost. Remember costs include license, equipment, training, conversion, interfacing with your other computer systems (such as laboratories or office diagnostic equipment), yearly licensing costs, costs for upgrades, system support, and equipment support.
- Arrange for onsite visits at practices that have implemented the system. See the system in action, discuss each practice's experiences with conversion and operation, and identify hidden costs.
- Finally, check the company's customer references and discuss the vendor's approach to implementation.

Now you should be ready to make

## **Top Five Mistakes to Avoid with EMR implementation**

1. **“Just buy something and we’ll make it work.”** It’s critical to clearly define the desired processes and outcomes before you start looking at software.
2. **“They’ll come around.”** All the doctors in your practice must be committed to this system before you start, or it won’t work.
3. **“How hard can it be?”** Don’t underestimate the implementation process. It takes commitment, time, and energy.
4. **“Don’t change anything.”** EMR offers you a chance to become more efficient and cost-effective. You must be willing to consider changes in processes, however, to reap the benefits.
5. **“We can’t afford it.”** You may be surprised at how you can impact your revenues through proper documentation. Don’t forget about the ways in which EMR can impact your profit equation.

your selection.

### **Implementation Planning**

Spend time on the vendor’s implementation plan and ensure it is complete with regard to software installation, data conversion, interface development, training schedule, and impact to the business. Ensure that the vendor provides a “go live” strategy that clearly defines how patient records will be scanned, how to manage patient workload during system startup, and a back-up plan in the event that the system does not function as intended. The implementation plan should allow adequate time for the process.

Physicians we have interviewed indicate that they have dedicated in excess of 40 hours to establish the templates and to learn how to use a system. Your practice cannot schedule a full workload while implementing an EMR system.

Our research shows that successful implementations were led and driven by physicians; decisions were made in a timely manner; current office processes were not sacred; adequate training was given; patient workload was light during the first few weeks of implementation; all providers were onboard; the participants understood that there would be issues during implementation;

and the providers understood that EMR systems are not a panacea.

Only you know what is appropriate for your practice. Do your homework, and if necessary, use a trusted advisor before spending your money on functions and features you neither need nor want. Once you have made a decision to purchase an EMR system, don’t delegate the responsibility for its successful implementation to others. At its best, an EMR system has the potential of streamlining your practice, reducing liability, reducing costs, and increasing revenue. At its worst, a poorly implemented EMR system represents a vast waste of time and resources. It can also be costly and disruptive to the practice without accomplishing any of the goals you had in mind when you started.

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