Guidelines for Evaluating Systems

I. General Guidelines

- **Establish a Process:** This will allow you to evaluate systems in a more consistent manner, to more effectively make an "apples-to-apples" comparision, and to not be as easily distracted by sales pitches.
    - Establish a team, which will be responsible for evaluating systems.
    - Develop a standard set of questions to ask.
    - Utilize a scorecard or similar mechanism to consistently document your evaluation of vendors and systems.

- **Know Your Priorities:** Identify the problems and issues within your practice, which the system needs to solve.
    - Conduct a needs assessment and prioritize the practice's needs.
    - Map identified needs to system features and functionality, which will address those needs.
    - Communicate those needs to vendors throughout your evaluation, both in your request for proposal (RFP) and during demos.

- **Drive the Product:** During product demos, don't allow the sales person simply to "drive" the product for you.
    - Utilize patient visit-based scenarios to better determine how well a system will fit your workflow.
    - Use demos to determine first-hand how well and how easy a system allows you to document a visit, write a prescription, etc.

- **Make the Vendor Show You:** "It can do that" is not good enough. Have the vendor show you or point you to a client using a particular feature or function.

- **Involve the Staff:** The system has to meet their needs as well, so include them in the evaluation process as much as possible.
    - Ensure the system selection team includes representatives from other departments.
    - Make sure the needs assessment addresses the needs of the entire practice.
    - Allow staff opportunities to participate in some product demos, especially for products, which are on the practice's short list.
    - Give staff an opportunity to weigh in on the final decision.

II. Conducting a Product Demo

- Use patient visit-based scenarios:
    - Multiple chronic conditions, e.g., diabetes and hypertension
    - Acute and chronic conditions addressed at the same visit
    - Different diagnostic and/or treatment needs
    - Utilize your own actual patient cases
    - Steer the demo to tricky situations you may have recently encountered
- Develop workflow scenarios:
    - Prescription refills/renewals
    - Lab results follow-up
    - Notification letters to patients
    - Group visits

- Ask data questions:
  - Identify all patients with diabetes who have not been seen in over a year
  - Notify all patients on particular medication, e.g., Vioxx
  - Find patients with a particular lab result, e.g., patients with LDL-C > 130 mg/dL
  - Questions with multiple search parameters, e.g., patients with diabetes who within the past year have had a HbA1C > 9.0%

Evaluating Product Functionality[1]

Use the following checklist to help evaluate specific product functionality.

Ease of Use	Workflow	Availability	Cost Considerations
▪ Did the product perform the function intuitively and with ease?	▪ How would this functionality be done? ▪ By whom among practice staff? ▪ Does it fit within practice's current workflow? ▪ Are there impacts to the practice's current workflow that represent major changes?	▪ Is this functionality available now? ▪ Is it included in the standard product offering? ▪ Is customization required? ▪ Who has to do the customization – vendor or client?	▪ Which product module includes functionality? Is it included in the quoted price? ▪ Is additional third-party software required? What is the associated cost? ▪ Is additional hardware required? What is the associated cost? ▪ Is ongoing maintenance required? What are the associated costs? Who does the maintenance?

1 Adapted from "Electronic Health Record (EHR) Product Guide." Object Health. May 2005.

III. Conducting Reference Site Visits

- Ask vendor for client list and contact clients yourself.

- Visit practices with a similar profile:
  - Size and specialties
  - Problems and goals

- Conduct a structured visit:
  - Establish overall goals
  - Develop a set of questions to ask
  - Identify processes and functions to observe

- Bring practice staff along.

- Spend as much time as possible watching the system in use.

- Understand the motives of references for hosting visits.

This material was provided by the Iowa Foundation of Medical Care, the Medicare Quality Improvement Organization for Iowa, was prepared by Lumetra, under contract with the Centers for Medicare & Medicaid Services (CMS), an agency of the U.S. Department of Health and Human Services. The contents presented do not necessarily reflect CMS policy. 8SoW-IA-DOQIT-03/06-003