HOW TO
PREPARE
FOR AN
EHR
SWITCH

The process of selecting and implementing an EHR system is a major commitment for an independent medical practice. Of course there's the financial cost, but there is also the time investment, staff training and changes to office processes. But what happens if after all of this you find that the system you chose isn't meeting your needs?

Unfortunately this is the reality for many medical practices across the country. In fact, a recent American College of Physicians survey found that approximately one-third of respondents were "very dissatisfied" with their current EHR system.[1] Another study of over 17,000 clinicians revealed that 23% were frustrated enough to consider switching EHR platforms.

Making the decision to change EHR isn't often one that is made lightly. However, it could be the key to keeping your medical practice independent and financially viable in this challenging economic climate.

This guide will provide valuable tips for any practice that is considering a new EHR technology. Taking the time to approach an EHR switch strategically will improve your chances of having a better EHR experience this time around.

Many physicians become independent to go into business for themselves. They want better control over their schedule and future, or to not be controlled of others. At its core, remaining independent means directing the course of your future.

Why switch?

There isn't a single reason why practices are breaking up with their original EHR systems. With demands of the ICD-10 crossover, Meaningful Use requirements and increasing financial stress on the private practice, the relationship with an EHR vendor can be complex one and so is the rationale for making a switch.

However, industry research has found there are common trends of why physicians and practice administrators feel like a new EHR system is the only solution their current challenges.

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A 2014 Black Book study identified four primary reasons why docs are ditching their EHR:

- The EHR doesn't meet practice's needs
- Practice didn't adequately identify their own needs before choosing their original EHR
- The original EHR design wasn't suited for the practice's specialty
- Poor vendor responsiveness

Other reasons were uncovered in a study published in a 2015 Family Practice Management article. Among the top were to gain added functionality, to achieve meaningful use, to improve usability, and to move to a cloud-based solution.

With all this moving going on, it's easy to wonder if the grass is really greener with a new EHR technology. So far it seems to be working for many practices: 28% reported that productivity has improved.

Practices that are reporting less-than-optimal results said they partially attribute it to their own lack of planning for the switch. That's why taking the time to properly prepare is so critical to EHR success.

If you are thinking that it's time to move on from your current vendor, or wondering if you should, read on for guidance on how to do it the right way.

1. "Survey of Clinicians: User Satisfaction with Electronic Health Records Has Decreased since 2010." American College of Physicians: March 1, 2013.
2. Medical Economics reporting on Black Book Market Research: Feb 2013.
3. EHR Loyalty Poll. Black Book Market Research: 2014.
4. The FPM Survey of Family Physicians Who Have Changed EHR Systems. Adler/Edsal/: July-August 2014.

How to switch

Breaking up is hard to do, even when it is with an EHR vendor. But with thoughtful planning, you can make moving on as smooth as possible.

Step 1
Gather input & feedback

Take the time to find out the specific reasons you are switching EHRs in the first place. Now with the benefit of hindsight, you can identify the factors you may have not considered when selecting your original vendor.

Talk to all of your stakeholders—physicians, administrators, billing staff, and support staff—to find out what their frustrations are with your current EHR system. Remember, the more specific staff members are, the easier it will be to find solutions to their problems.

A few questions to ask:

- What features aren't working like they should?
- Where is time wasted?
- Why are people avoiding the EHR?
- What is working for you?
- How easy is it to access & manage data?

Understanding why the first EHR is failing can prevent repeating history.

Step 2
Create your shopping list

Think of EHR shopping like going to buy a car - you typically know the must-have features before you even step onto the lot. Try to approach this the process the same way.

Create an "EHR Shopping List" to help you narrow down your options. Although every EHR has different strengths, clearly writing down what is important to you early on will help zero in on the EHR that's best for your practice.

Ask each stakeholder to provide you with their must-haves and their nice-to-haves features to help your write your master list.

Below are some of the most common features that practices look for in a new EHR:

1. Cloud-based system
2. ICD-10 readiness
3. Meaningful Use certifications
4. True interoperability
5. Robust financial reporting
6. World-class mobile capabilities
7. Intuitive scheduling with automated reminders
8. Powerful online patient portal
9. Proven billing solutions
10. Painless upgrades and scalability
11. Trustworthy vendor with staying power
12. Solutions for multi-provider, multi-locations practices

This list will help you eliminate lackluster EHR systems from your hunt, and it will give you guidance when speaking with potential EHR vendors.

Step 3
Begin research

Think of EHR shopping like going to buy a car - you Begin reading online client reviews to see which EHR vendors are making the grade. Look to see which features users rant or rave about, then compare those findings to your shopping list. Also, review vendors' sites for product demos: these online demos can be a great place to see features are in action.

Asking colleagues in your professional network and specialty is a great way to see which EHR systems should be considered. Let your peers' experiences help guide you while shopping for a new EHR.

Step 4
Schedule vendor demos

Once you have a narrowed down your list to a few contenders, set up a personalized demo with each of your finalists.

You can tell a lot about an EHR vendor by how they handle their demo. A good vendor will provide you with a demo that highlights the features, functionality, and implementation of a new EHR. They should also provide adequate time to answer your most important questions.

Below are a few questions you should ask during EHR demos:

1. How will you help our practice implement the new EHR?

2. What are the options for data migration?

3. How do you manage updates and upgrades?

4. How does billing data flow from the EHR?

5. Is the Practice Management system included and integrated?

6. What type of training is available for providers and staff?

7. What are the hardware requirements for your EHR?

8. What certifications does your EHR have?

9. What are the pricing and contract structures?

10. How can I customize my EHR platform for my specific needs?

11. What type of ongoing support do you provide for your EHR?

12. What makes your EHR different from your competitors?

You may have other specific questions to add to the list: Write them down to be sure they are addressed during the demo. Also, refer back to your list of must-have and desired features.

If possible, allow key stakeholders to preview the software; more than one set of eyes can help in the evaluation process. It can also bolster staff buy-in when implementation time comes when they are involved in the decision-making process.

Plan for data conversion

The transition of patient data from paper charts to an EHR was a no doubt a major undertaking. Moving this data to an EHR can be an equally challenging task if not properly planned. That's why data conversion strategy is key to a successful EHR switch.

Because each EHR has its own way of entering, storing, and exporting data, there is no magic button to push to migrate all your patient data between two platforms. To complete a data migration effectively, you need to develop a solid strategy that considers the unique needs of the practice and the requirements of both the old and new EHR platforms.

Speak with your vendor to discuss the best way to get all that patient info into the new platform. The vendor may have dedicated services to help in this process, or you may choose to partner with a third-party data conversion service. Whichever path you determine is best, there are proven steps that will help you avoid a data-conversion disaster.

- Start the conversion process early, as much as six months prior to the launch of the new system.
- Create a Data Conversion Team to make sure all meaningful data is carried over and all stakeholders are represented in the process.

- Establish data requirements including which data will be converted, the process of transferring data in both the old and new system, and where you will store data that isn't being converted. (Remember you are required to store some data for as long as seven years.)
- Test data conversion with small samples in order to tweak the process when necessary.

Because this step is often an afterthought, many practices often find this data migration can be a major headache during a migrations switch. But it doesn't have to be. A good EHR vendor should walk you through this step-by-step process while limiting the disruption to workflow as much as possible.

Conclusion

If you are considering switching EHR vendors, you are probably feeling a little overwhelmed by the task. But remember the reasons why you are wanting to make a move in the first place: Struggling with a clunky EHR that doesn't meet your needs is only holding you back.

As your prep your practice for a switch, be sure to include the steps presented in this guide. A little strategizing, planning and researching now will streamline the process and get your new platform up and rolling as quickly and smoothly as possible.

Looking to switch EHR vendors?

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Get started now.

AdvancedMD resources

About ADP AdvancedMD.

ADP AdvancedMD is a leader in all-in-one cloud electronic health records (EHR), practice management, medical scheduling, medical billing services as well as a pioneer of Big Data reporting and business intelligence for small, independent medical practices. AdvancedMD is part of ADP, a trusted company with $11B in revenues and 620,000 clients, including 45,000 physicians.

As one of the earliest providers of cloud-based medical office software, AdvancedMD offers speed and cost savings related to software upgrades that are automatic and inclusive with a monthly subscription. AdvancedMD proprietary claims scrubbing produces 95%+ first-pass acceptance compared to the industry average of 70%. AdvancedMD EHR, certified as a Complete EHR under Meaningful Use 2 requirements, provides the independent physician with clinical solutions to manage patient care from anywhere with improved workflow efficiency and operational control. Clients receive automatic and offsite backup, as well as ongoing updates to meet regulatory compliance. For more information, visit advancedmd.com.

Need a new EHR for ICD-10?

Verifying that your EHR and practice management bundle (or separate systems) is up for the ICD-10 challenge may be the most important step to ensuring your own compliance. This guide provides 12 critical questions that ever private practice must ask its EHR vendor, or risk being left high and dry come October 1, 2015. Your answers may tell you if it's time for a switch

4 surefire signs you need a new EHR for MU2 and beyond

As of November 1, 2014, only 2% of eligible professionals had attested to Meaningful Use 2. This is not good news for the thousands of independent physician practices that rely on Medicare payments: the Center for Medicare Services is slated to hand out 1% penalties this year for MU2 slackers—which is estimated to total $1.15B. With the 2014 Hardship Exception Deadline on the books, it's time for many private practices to get serious about MU2. There are a few telltale signs that expose an EHR vendor's inability to keep up with the rapid-fire demands of changing regulations like MU2. This exclusive guide identifies four signs that it's time for a move.

5 essentials on how to stay independent

It's harder than ever to run a successful independent medical practice. As value-based reimbursement becomes more common along with the fee-for-service model, in order to receive payment, physicians will need to demonstrate clinical outcomes while providing seamless care.

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