Committing to an electronic medical records program is a big darn deal. It's an important decision and investment, no matter how you slice it. We've tried to break the process down into manageable chunks and provide guidance for your journey, whether you pick PIMSY or another mental health EHR option.

The most important keys to a successful electronic records implementation are a) finding the right practice management system for your agency and b) ensuring that your staff is thoroughly trained on the program to maximize the benefits it offers. Here are 7 steps to implement those keys:

1) Make a list of the most important things to you regarding mental health EMR
For example, if you don't do your own billing, you'll want to communicate that immediately to a potential system's sales team so they can connect you with the right product. If the most vital issue to your practice is ensuring that you don't use expired authorizations or that you can run a report showing which clients have no-showed for appointments, you need to let your prospective EHRs know immediately, so you don't waste time considering software that can't do what you need most.

Once you can identify what you require as the backbone of your practice parameters, you'll have a much easier time weeding out systems that may not deliver what you need.

2) Create an email template of these vital necessities
Write up a brief description of the flow of your practice: an overview of how you see clients, what records you currently keep, and what steps you routinely take. Include what you would like to see happen in the future: ie, what you're hoping to change in your day-to-day operations in the immediate future, a few years down the road, and over the next decade.

Knowing what you currently need and what direction you want to take going forward can serve two purposes. It can greatly assist in getting clarity to choose the right program; and it helps the salespeople you interact with to give you information relevant to your needs.

Ideally, you want to be on a system that grows with your practice, meeting your current needs affordably and comprehensively now - and offering enhanced functionality in the future to accommodate your evolving business goals.

3) Add a request for specific pricing
What are the upfront costs? Are there any ongoing costs? And what do these fees cover? How much does it cost for training? How much does it cost for ongoing support once training is finished? How are training and support handled?

Check out Stellar Support for details about what to consider - and ask vendors - when weighing training & support.

When choosing a behavioral health software, you should always factor the quality and cost of training & support into the price, as they can be more crucial than the program itself.
4) Get insider help: use a software directory
Utilize complimentary software directories to help you see what's available, narrow your search based on practice criteria, and see reviews by clients and technology advisors. For example, Capterra lets you not only see brief overviews of what different systems are offering, and cull your list based on parameters; it also allows you to read uncensored reviews by real users. See Mental & Behavioral Health Software Directories for more tips and links to directory sites.

5) Get program referrals from colleagues you trust
Ask your peers who are using electronic systems what they do and don't like about their chosen product, including what they wish was different. Add any programs that sound solid to your list of prospective systems. Once you've compiled your list, send them the email template you generated in steps 1 - 3.

6) Carefully Note Responses & Follow Up
You'll be able to tell pretty quickly, both by the level of response you receive and the answers to your specific needs, whether or not a system might be right for you. For example, if you don't get an answer within 24-48 hours, it's a pretty safe bet that you wouldn't get a different level of service once you're a customer!

You should also feel confident that your questions and concerns have been addressed clearly and with specific examples. Hopefully you'll also be offered options: for example, if you feel like your question has been skirted around with a vague answer and a solid solution isn't offered for the core components of your practice, that's probably not the product for you.

The vendor should explain how their EHR not only meets your current needs, but also how it can be adapted to fulfill future goals. Use the response level and quality to narrow down your choices, and remove any products from your list that don't offer solid, timely solutions.

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7) Conduct a careful elimination process
Your final eliminations should include considering not only the product itself, but also intangibles like training, support and implementation assistance. Once you've weeded out the systems that don't work for you, request free demos of each EHR you're still considering.

The vendor should provide you an opportunity to not only see the system in action, but also to ask questions specific to your workflow. During the demo, re-ask some of the inquiries in your original email. Take note of any answers that aren't consistent with what you were originally told: providing more detail is great; giving a different answer is not!

At a certain point, you have to take the plunge. Be sure to clarify the terms of the contract you sign, including how you would get your data out of the system should you choose not to renew in the future (some systems hold it hostage!), and ask for an implementation program to help with a smoother roll out.

See our EMR Resource Center for additional complimentary tools - for more information about PIMSY mental health EHR, check out our quick video demo. We're happy to provide a customized quote or answer any questions you might have: 877.334.8512, ext. 1 - hello@pimsyemr.com