7 Steps to finding the right EHR for your practice (Part 1 of 2)

1) Make a list of the most important things to you regarding an 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, 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 and 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. Add to your email 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 needs. It really helps you get clarity to choose the right program and it assists the salespeople you interact with to give you information about what they are offering and how relevant it is to your needs. Ideally, you want to be on a system that grows with your practice, meeting your current needs affordably and offering enhanced functionality in the future to accommodate your evolving business and practice 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? For example, if you’re required to fly your staff to a different state and pay for a week’s worth of training, that may put you completely out of your price range, even if the system itself is the cheapest one you’re considering. If the only support available long-term is to watch videos or scour a user’s manual, you may decide that you need more hands-on assistance. Or if stellar support is available but at an exorbitant price, move on to a company that provides it for free or more affordably.