EMR Vendor-Practice Relationships: Will You Still Love Me Tomorrow?

Here's how vendors pledge to make EMR work long-term.

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After a lengthy (and sometimes contentious) courtship, you've committed your practice to an EMR system. You're nervous about the big day, but are relieved when it goes off without a hitch. Now, you wonder, what happens to the vendor-practice relationship *after* you have "gone live" with your system?

"I think the doctors underestimate how important it is to select the right 'business partner' when it comes to EMR," says Mary Ann Fitzhugh, vice president of marketing at Compulink. "In our experience, we've found selecting an EMR partner is much like selecting a mate. You need someone who can go the distance, has their goals closely aligned with yours and will support you unconditionally!"

As in a marriage, many of the EMR issues you will face day to day will not have been covered during training. Are you concerned about how devoted your new mate will be long term? We asked several vendors to describe what they do to make sure you two live happily ever after.

Successful Implementation Strategies

The true indicator of a successful implementation is the lack of support services required after an installation, says Ben Passantino, vice president of key strategic projects at Ifa. "The better the communication process, the higher probability of success."

"The ingredients for a successful implementation are picking the right product, having a strong corporate champion and sponsorship, selecting the right personnel for the internal support team and planning, planning and more planning," says Jim Messier, vice president of sales and marketing at Medflow. He stresses that communication and planning are the keys for success.

As a result of implementing customized EHR for over 15 years, Compulink has developed a finely tuned process to ensure a successful implementation. Ms. Fitzhugh says that some of the key pillars of the process include:

- ***Dedicated implementation coordinator.*** This person works with the client from the day of purchase until several weeks after the practice goes live, ensuring that the system is up and running successfully
- ***Project timeline.*** This sets the "plan" based on meeting a client's time requirements for going live, outlines the steps and serves to keep the team on track to success.
- ***Training.*** Including an assigned trainer to guide the entire staff through the training and customization process, plus customization and training "quizzes" to test readiness of the staff before going live.

CONTINUED ON PAGE 56

■ ***Weekly status reports.*** These keep the client informed about progress and keep the project on track.

NextGen also stresses the importance of open communication in their implementation strategy. For ophthalmology, they have EMR trainers who are subject-matter experts and are assigned to these types of projects. They also train their EMR users on specialty-specific workflows.

"The strategy for a successful implementation includes a defined project plan with each deliverable outlined to execute the project on time," says Bryan Farrell, marketing manager for OIS. Documentation of the project with a complete implementation manual is provided to every client and reviewed in a formal meeting. "The last pieces to our implementation successes are commitment and attendance to the training provided to ease the transition at 'go live' and increase the usability of all end users," says Mr. Farrell.

After the "Go-Live" Date

Strong vendor support is essential to EMR success. Below are some of the steps vendors take to ensure that success.

Compulink stresses that implementing EMR is a process, not a one-time event. After clients "go live," they assign a "honeymoon team" to continue to work closely with users in a supportive relationship. This team makes sure that the users are fully utilizing the features of the system, along with assisting with the "tweaking" of their custom screens and streamlining data entry.

Compulink ensures the team's availability to users via a Web Client Portal. Clients can find on-demand access to a wide range of EMR resources to help ensure their ongoing success, including EMR tips, training classes, new feature information and the latest information on federal legislation/compliance (e.g., HITECH Act, meaningful use).

Approximately 30 days after a successful go-live day, Medflow's clients are transitioned to Support. During the implementation process, the client will have been assigned a project manager and a team of trainers who stay with the project from start to finish. The project manager gets the "sign-off" from the client after the go-live to assure a smooth handoff to Support. Typically, about three to four months after go-live, Medflow will contact the client to determine their progress and success with the system.

At the end of a project, NextGen's client moves from implementation to their Client Care department and then finally to Client Support. Throughout the relationship, they periodically visit clients, invite them to events and survey them to make sure the lines of communication remain open. They also encourage open conversation on their Community Forum Experts. Executives participate in the forum discussions as well.

At OIS, once a client goes live they are transitioned from their Implementation Project Manager to a Client Relations Manager in a formal transition call. The Client Relations Manager meets regularly with the client to review their account.

For Ifa, the key individual responsible for managing the needs of the client on an ongoing basis is an Ifa EMR-certified consultant, who serves as the client's surrogate and orchestrates the team. Once the client goes live, this account manager tracks progress at the practice or clinic to assure that the system is meeting all planned benchmarks. Ifa team members involved with the site planning, implementation and training remain in contact with doctors, technicians and administrators during the first weeks after the installation. Afterwards, the Ifa consultant as well as a designated support specialist remains in constant contact with the client. Additionally, customer courtesy calls are made throughout the year to monitor customer satisfaction.

At VersaSuite, a project manager is assigned to manage the full cycle of product implementation. There are weekly implementation meetings to cover roles and responsibilities, data converting and goals. Account managers correspond daily for at least the first month after the go-live date. After each major upgrade, up to two hours of complimentary remote training is provided.

Updates and Regulatory Requirements

With ever-changing government regulations and the desire to meet the meaningful use criteria, how are vendors keeping their clients up to date with upgrades and regulatory requirements?

Compulink provides clients with updates on key legislation (e.g. HITECH Act) and compliance requirements every 90 days. They are also a CCHIT Certified 2011 Ambulatory EHR vendor.

Medflow's clients receive new material built into the system approximately four times a year. It is not mandated that users implement everything developed, but through the documentation and videos provided for each update they can determine how and if they want to implement new features of the system.

NextGen communicates with its client base in several different ways. The company has a Web site as well as a protected client-resources portal that provides a significant amount of information, documentation and best-practice materials. A section of their public Web site is dedicated exclusively to helping clients understand ARRA and meaningful use. NextGen Healthcare's experts and executives host several Webinars each month to provide the latest regulatory updates from Washington, DC, and how these affect clients.

Ifa releases software updates that address various system enhancements, including regulatory requirements, every quarter. When necessary and required, ad hoc updates will be issued as well.

OIS actively participates with CCHIT and other regulatory agencies to make sure their product will meet those standards. Additionally, they provide medication updates and the latest ICD codes as they are released. OIS's updates to the latest version of the company's product are free to clients as part of their support agreement.

Investing in the Future

Vendors were also asked how much their companies invest in updating technology and if users must purchase these updates. Here's what they told us.

At Medflow, updates and upgrades are part of the ongoing support a customer receives. Clients pay a monthly fee for this. As long as this is paid and current, they will receive everything developed in the system.

ManagementPlus says it invests 50% of revenue to updating technology, and all of its updates are free.

VersaSuite says 40% of its revenue is invested in new technologies and product enhancements.

Compulink's Customer Care Package includes:

- Unlimited technical support on the product.
- Internet-based training and testing to ensure staff actually is using the system as efficiently as possible.
- An IT help desk.
- Annual product utilization reviews, to ensure business owners are maximizing the ROI on their solution investment.

With NextGen, if a client has software maintenance included in their contract and is current in payments, updates to the product are free.

For Ifa customers, "As long as the practice of ophthalmology changes, as well as the range of supporting information technologies changes, the Ifa suite of solutions will evolve," says Mr. Passantino. All active clients receive these updates at no additional cost, he says.

Lessons Learned

Once an installation is complete, many vendors say they will gather for a "lessons learned" meeting. Here is what they learn by going through this process.

Jim Messier at Medflow says that, regardless of the size of the project, there are definitely repeatable steps that need to be completed and followed in order to have a successful outcome. "Communication within the organization is critical, and we never stop learning from our people," he states. Medflow's trainers are COA-, COT- or COMT-trained professionals.

"These folks know ophthalmology, they know how patients get handled, they know how the workflow is supposed to move — so by having this highly talented pool of people working in the process, we are constantly learning about how to do things better, in a shorter amount of time and with a higher degree of success and compliance," says Mr. Messier.

After installation, Compulink conducts a "success" conference to discuss how the implementation is going, what is working and what needs attention. It's how the company makes continuous improvements to their EMR-implementation process, says Ms. Fitzhugh.

At the end of all NextGen product implementations, the team conducts a final "audit" of the client's system, not only as one last check for problems but also to list advanced features or functionality that could be utilized. That audit report is reviewed with the implementation specialist, the client and the project manager.

Safe and Secure?

Lastly, many doctors have voiced concerns about securing their medical records. Who "owns" these records? If the system goes down, who is responsible for bringing it back up? If the records are stored on an off-site server, how do you help maintain their security? Generally speaking, vendors stress that the practice owns its own data but the vendor is available as a resource to help improve security measures.

Most of Medflow's clients have a "client-server" environment, which means the primary system server is onsite within the walls of the practice. Each server is sold with a fully redundant disc-array and is equipped with an optical tape backup. The company strongly suggests that the monthly tapes be taken offsite and stored somewhere safe and secure. MedFlow also offers real-time backup through third-party companies.

At ManagementPlus, the practices/doctors own their data. If the system goes down, responsibility for bringing it back up depends on what caused it to go down. The company participates with the local vendor in troubleshooting, and if necessary, bringing the system back up. They work with an off-site server company (co-locator) that meets or exceeds industry standards with regard to security.

Similarly, at Compulink, the provider also owns their medical record data. If a computer system goes down and the provider/business owner has its own equipment, it is the responsibility of the practice's IT person to correct it, with Compulink's assistance. They also offer a hosting solution where they provide the server, updates and backups for those offices that do not want the responsibility. Data is secured in a fashion to meet all appropriate HIPAA guidelines.

NextGen also mentions client ownership of data. If a system were to go down, NextGen would work with the client to identify what variables caused it and how to resolve the situation. Regarding security, the NextGen application has its own built-in security-management tools to prevent unauthorized access. It exists inside a secure network environment where access is granted only to authorized users and monitored using firewalls, VPN clients, security appliances and intrusion-detection and prevention solutions. Other measures like encryption are also deployed to enhance security. All of these factors contribute to the prevention of fraud and theft.

At VersaSuite, data security is "owned" by the client and VersaSuite can advise them on optimal solutions when a consult is requested.

OIS clients also own their medical records — and the associated hardware (servers, etc.). "It is clearly outlined that it is the client's responsibility to have the proper IT resource and a disaster recovery plan in place as part of the implementation process," concludes Mr. Farrell.

The ownership issue, unfortunately, has many doctors concerned about doing business with an EMR company, says Ifa. It is Ifa's policy that the medical records are never the property of the EMR provider. "We are simply the custodian of the patient data," says Ben Passantino. "It is our fiduciary responsibility to protect and preserve the medical records and their certified owner from loss or harm."

A Long-Term Commitment

"I'm concerned that doctors and practices purchasing systems today are not asking enough questions about support," says Christine Archibald of ManagementPlus.

Here are some metrics that ManagementPlus follows to measure how the company is doing for their clients: What percentage of the time do customers get a live person when they call? Is the tech support team outsourced to another country? What is the average number of days the tech support teams take to resolve a ticket? What is the ratio of tech support agents to customers? "All tech support centers track this data, or should," says Ms. Archibald.

"It gives the practice an idea of what type of support they are going to receive after they've made a very expensive initial purchase," Medflow's Mr. Messier concurs. "The best software in the world is horrible if not adequately supported." Mr. Messier say a practice needs to not only pick the right product, but also the right partner who can help to manage the process from start to finish.

While selecting and implementing an EMR system is a massive undertaking, the vendors profess that a practice can count on its significant other in the venture to stand by them "for better or for worse." OM