



## EHR Selection Checklist

The goal of this tool is to help guide eligible primary care providers with the evaluation and selection of an Electronic Health Record (EHR) vendor and software through signing a contract with a vendor. This is not an exhaustive plan, but rather a guide to help navigate the major milestones that most practices must meet. This checklist also utilizes the use of the RI REC's Vendor Selection and Evaluation Tool Kit. For a more detailed analysis, consider hiring a technical service consultant, available at discounted rates in the RI REC Vendor Marketplace.

Practice Name: \_\_\_\_\_  
 Reviewed Check list with (name/s): \_\_\_\_\_  
 Date(s) Reviewed: \_\_\_\_\_  
 RI REC Relationship Manager \_\_\_\_\_

## Practice Self Assessment

	Important Steps	Notes/Planning/Timeline
<input type="checkbox"/>	<b>What are your anticipated dates to:</b> Sign Contract? _____ Implement EHR? _____ Attest to Meaningful Use? _____	
<input type="checkbox"/>	<b>On a scale of 1 to 10, what is your comfort level that your practice will:</b> Sign Contract? _____ Implement EHR? _____ Attest to Meaningful Use? _____	
<input type="checkbox"/>	<b>On a scale of 1 to 10, what is your comfort level that your practice will be able to dedicate time and resources to:</b> Sign Contract? _____ Implement EHR? _____ Attest to Meaningful Use? _____	

**Additional Notes:**



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Important Steps	Notes/Planning/Timeline
<input type="checkbox"/> <b>Enroll in RI REC &amp; learn about available services:</b> <a href="http://docehrtalk.org/about-ri-rec/for-providers/enrollment">http://docehrtalk.org/about-ri-rec/for-providers/enrollment</a>	
<input type="checkbox"/> <b>Assess Existing Knowledge of:</b> EHRs, Meaningful Use, Health IT Certification, RI's Statewide HIE: <b>currentcare</b> , RI REC's Direct Program, BCBS Fee Increase & Grant, etc.	
<input type="checkbox"/> <b>Review Meaningful Use (MU) Requirements:</b> <ol style="list-style-type: none"> <li>1. Start with RI REC's MU Strategy Packet</li> <li>2. Determine Eligibility (Medicare, Medicaid, neither)</li> <li>3. Discuss potential incentive payments &amp; potential penalties</li> </ol>	
<input type="checkbox"/> <b>Create e-Prescribing (eRx) Strategy:</b> Are you currently e-prescribing? If not, are you aware of the Medicare penalties for 2013, 2014 and beyond?	
<input type="checkbox"/> <b>Learn from Local Peers:</b> Consider talking with or shadowing RI Physician Leaders or other peers. <a href="http://docehrtalk.org/knowledge-center/resources#learn_from_leader">http://docehrtalk.org/knowledge-center/resources#learn_from_leader</a>	
<input type="checkbox"/> <b>Discuss the Advantages of a Readiness Assessment (RA):</b> We strongly suggest that you have an RA through the RI REC Vendor Marketplace to determine an action plan to implement an EHR. Includes: assessment of goals & cultural, operational and technology needs: <a href="http://docehrtalk.org/selecting-ehr/vendor-marketplace-services/#tsc">http://docehrtalk.org/selecting-ehr/vendor-marketplace-services/#tsc</a>	
<input type="checkbox"/> <b>Request Quotes (RFPs) from Technical Service Consultants (TSCs), as needed:</b> TSCs are available to guide you through all phases of EHR selection & Implementation, IT support, Training and Practice Optimization: <a href="http://docehrtalk.org/selecting-ehr/vendor-marketplace-participants#tsc">http://docehrtalk.org/selecting-ehr/vendor-marketplace-participants#tsc</a>	
<input type="checkbox"/> <b>Assess EHR Needs:</b> <ol style="list-style-type: none"> <li>1. Review RIQI's Vendor Marketplace EHR vendor profiles:  <a href="http://www.docehrtalk.org/selecting-ehr/vendor-marketplace-participants">http://www.docehrtalk.org/selecting-ehr/vendor-marketplace-participants</a>.</li> <li>2. Utilize the knowledge of your REC Relationship Manager</li> </ol>	
<input type="checkbox"/> <b>Utilize the Vendor Selection and Evaluation Tool Kit to Narrow Down EHR Vendors in the Vendor Marketplace:</b> <ol style="list-style-type: none"> <li>1. Work with your REC Relationship Manager to select your practice requirements in the <i>Vendor Selection Drill Down</i> tab.</li> <li>2. Note the EHR vendors listed on the <i>Results</i> tab</li> </ol>	
<input type="checkbox"/> <b>Request Quotes (RFPs) from Electronic Health Record vendors (EHRs), as needed:</b> For EHR vendors in the RI REC Vendor Marketplace, RI REC facilitates this process, ensuring you receive the REC discount and standard contract. Ensure the vendors you consider are <b>ONC-certified for Meaningful Use</b> .	
<input type="checkbox"/> <b>Review RFP Responses:</b> The vendor responses will be sent directly to you with your Relationship Manager copied on them. They will include a pricing breakdown and other supporting documentation.	
<input type="checkbox"/> <b>Schedule Vendor Demonstrations:</b> After reviewing EHR vendor responses, choose your top 2 – 3 vendors to schedule demo's with. Work with your RM to schedule them as they have working relationships with the marketplace vendors.	
<input type="checkbox"/> <b>Prepare for &amp; Attend Vendor Demonstrations:</b>	



	<p>Review the <i>General Questions</i> tab in the Vendor Selection and Evaluation Tool Kit to highlight or note additional questions that you would like to ask each vendor.</p>	
<input type="checkbox"/>	<p><b>Set Up &amp; Utilize the Vendor Selection and Evaluation Tool Kit to Narrow Down Your Vendors during the Demonstrations:</b></p> <ol style="list-style-type: none"> <li>1. Use the <i>Evaluation Set Up</i> tab to enter your software vendors (and chosen abbreviations).</li> <li>2. Become familiar with the <i>Product Features</i> tab and enter any specific requirements for your practice in lines 21 – 32.</li> <li>3. Work with your team to enter a Weight for each item (0 – 5).</li> </ol>	
<input type="checkbox"/>	<p><b>Choose EHR Vendor:</b></p> <p>RI REC facilitates this process as a vendor-neutral coach; however for in-depth analysis and action plans, consult a TSC. Compare Pros and Cons to help decide which EHR is best for your practice.</p> <ol style="list-style-type: none"> <li>1. Enter Scores (0 – 5) for each vendor, taking into consideration the Product Features listed in each row, including the practice requirements that you added. Note: Refer to the <i>Product Feature Definitions</i> tab for a breakdown of each feature.</li> <li>2. Review the total Weighted Scores for each vendor and compare.</li> <li>3. Choose the EHR vendor that best suits your practice.</li> </ol>	
	<p><b>Note:</b> if your practice was unable to narrow it down to 1 vendor, you can ask your vendors for references or visit another practice that uses the same software. Your RM can assist in this process.</p>	
<input type="checkbox"/>	<p><b>Sign Contract:</b></p> <p>Sign standard REC contract with selected EHR vendor, ensuring fair terms and requiring less legal fees on your end.</p>	

*For questions about Rhode Island Quality Institute’s Regional Extension Center (REC), please call (888) 858-4815, e-mail [RIREC@riqi.org](mailto:RIREC@riqi.org) or visit [DocEHRtalk.org](http://DocEHRtalk.org).*