The purchase and implementation of an electronic health record system (EHR) is no small feat—especially for small practices, who frequently have limited resources, staff, and capital to invest.

According to a recent study conducted by AmericanEHR, nearly 40 percent of physicians would not recommend their EHR solution to another provider; only slightly fewer said they would not purchase the same software again.

Conversely, in a study conducted this year by an EHR vendor, the approximately 60 percent of physicians who are satisfied see improvements to care and workflow. What makes the difference? **Those physicians who get the most out of their EHRs carefully considered the products, the vendors, the implementation, the training they’d require, and how the EHR would be used on a day-to-day basis.**

Most small practices can’t afford to pay someone to select their EHR. We’ve prepared this guide to help those of you in small practices do it yourself.

“Digital technologies that enable real-time claims management and payment, automate dictation and coding, and improve physicians’ communication with each other and with patients could lower overhead costs and enable more efficient practice.”

—Jeff Goldsmith, Ph.D., Associate Professor Public Health Sciences, University of Virginia – The Future of Medical Practice: Creating Options for Practicing Physicians to Control Their Professional Destiny
Selecting an EHR

Your EHR choice is one of the most important decisions that you will make for your practice. It can dramatically impact the way your practice operates, and how you interact with patients and other healthcare providers. It can be challenging to learn new technology and adapt to new workflows—choosing the right solution can help.

According to Ron Sterling, an independent EHR consultant and publisher of the popular blog Avoid EHR Disasters (www.Avoid-EHR-Disasters.blogspot.com), the key features and functions that small practices need in an EHR are not necessarily the same ones that larger organizations need. Small practices need easy-to-use and comprehensive solutions to clinical operation and patient service challenges. By focusing primarily on those features that improve workflow and support both staff and doctors, you’ll find the most practical solution to the needs of your small practice. Keep in mind that some of these features are critical if you plan to attest to Meaningful Use or to qualify for Patient Centered Medical Home (PCMH).

Ron Sterling’s Top 14 Critical Features And Functions

1. Certified EHR
   If an EHR is not certified for Meaningful Use, then its value is limited. Confirm certification for Stage 1 and discuss the company’s plan to meet the updated requirements of Stage 2.

2. Usability
   Ease of use—you hear it all the time, but for small practices it really is vital. You don’t have the time, money, or staff to have big drops in productivity or a steep learning curve. User friendliness is in the eye of the beholder—don’t take someone else’s word for it. You definitely want physicians to see the product in action and test it out for themselves.

3. Clinical content
   Clinical content comprises the specific checklists, documents, and tools that support your area of medicine. The best way to check on the applicability of the clinical content is to sign-up or ask for a trial login and document a couple sample notes you have for actual patients.

4. Patient summary screen
   Patient summary screens display key information about a patient’s status or situation. Note that requirements can vary per specialty. For example, pediatricians are interested in immunizations, surgeons may want a list of prior surgeries. All doctors want a list of medications, current conditions, and outstanding care items.
5. View options
When looking for patient information, it’s best to have different view options built into the EHR. For example, the option to see the patient chart in either chronological or reverse chronological order, or grouped by type of information (e.g., lab tests, radiology studies, and the like).

6. Orders
To avoid liability issues, clinical orders typically are recorded and include the status and due date of the plan item for the patient. For example, a treatment order may be pending for a future time, have been completed, or refused by the patient. To efficiently manage services, you should be able to view all patients with selected types of open orders (e.g., A1C) for selected due dates, plus be able to review orders on the patient summary screen. Order management is an important feature to manage quality and patient service, as well as participate in initiatives like PCMH.

7. Health maintenance recommendations
Health maintenance items are care standards that apply to patients based on their age, sex, diagnosis, and previous treatments (e.g., immunizations for children, colonoscopies for patients over the age of 50, and annual checkups on hip replacements). Health maintenance items should automatically and clearly be displayed when a patient qualifies for the care standard.

8. Procedure scheduling management
Specialists need a tool to monitor the progress of patients through the surgery or procedure scheduling process. Your EHR should provide the ability to schedule multiple resources and recurring visits, as well as to record and manage patient-specific information about the procedure and services.

Don’t get distracted by extras you don’t need
“There’s a battle being waged in health IT. If you’ve seen the latest feature grids comparing medical software, you know what I mean—page after page after page of product features. You’d have to have a photographic memory to be able to truly compare products with a list that long because no one can remember them all. What’s worse is that the majority of these features simply aren’t relevant to most small practices.”

—Dan Rodrigues, CEO Kareo
9. Referral management
Primary care practices need to track both patients who are referred to other providers, and the status of those recommendations. Your EHR should be able to assign a patient service to an outside party and track the status of that referral up to and including receipt of the referral clinical report.

10. Messages
You’ll need to record messages in order to transfer patient issues to other staff and remind them about important patient issues. Messages should document the cycle of events associated with the issue, such as passing a question to a doctor for follow up by a nurse or having a final discussion with a patient about any requests.

11. Diagnostic interfaces
Many doctors rely on information from a variety of diagnostic devices to support clinical analysis and patient care. At some point, the diagnostic results and images will make their way to your EHR. Your EHR should be capable of sending diagnostic orders to the lab information system and of receiving the results for review and inclusion in a patient record.

12. Image upload, scanning, and annotation
Images include incoming diagnostic images, reports from other parties, and scanned portions of a patient’s paper chart. Doctors must be able to determine whether the image is waiting to be reviewed and where the image came from. Though not a requirement, the ability to directly draw on an image and save the annotated view is helpful for highlighting important observations.

13. Patient portal integration
Your EHR should be able to send patient information, including clinical summaries, reminders, and results to a patient portal. Patient portal advancements are being made that support interactions with doctors and that provide immediate patient access to care information. In addition, secured messages between doctors and patients are supported through patient portals, and, in some cases, patient information entered into a patient portal can be sent to an EHR, thereby enabling doctors to fully document patient interactions.

14. Authorization and disclosure tracking
Recent changes to the HIPAA Omnibus rules regarding the handling and disclosure of patient information, as well as to the more complicated rules for impermissible use and disclosure of protected health information (PHI) increase the importance of keeping appropriate records for disclosures and uses of PHI. The more information you can record on the status of the disclosures for a patient, the less chance you have of a problem. Your EHR should record patient limitations on distribution of PHI, as well as document when information is distributed.
Beyond the Software

There’s more to buying an EHR than just software and features. Once you choose an EHR product, you’ll be working with that EHR vendor for a long time to come. Consider the following factors into your decision-making process:

**Vendor stability**
The revenue sustainability, corporate stability, longevity, and growth momentum of your EHR vendor is important. How many installations have they done? Are they financially viable? What’s the growth rate of their installations? Of their revenue? If a vendor isn’t attracting new users, your small practice should not consider their product.

**Product development**
Verify that the product is regularly being enhanced and improved. Ask about product improvements in recent release notes, and planned improvements for the next release. If the vendor is evasive, or the release notes don’t include substantive improvements, the vendor may not be supporting its EHR to remain sufficiently competitive and viable.

**Online help and assistance**
Small practices need EHRs with excellent online help and teaching materials. Because they often have limited resources, most small practices need training strategies that include online videos and materials that can be accessed at any time and are complete and concise. Similarly, look for a vendor whose help desk is staffed by people who can target the problems of your type of practice, and can address those problems at an appropriate level of sophistication.

Work in the Cloud

The days of storing expensive servers in your practice are over. Today’s small practice has options, including SaaS (Software as a Service), also known as cloud-based, EHR products. Cloud-based EHRs conveniently manage all record creation, sharing, and storage over the Internet, thereby minimizing the costs of hardware and licenses while still providing robust features, electronic connectivity with labs and pharmacies, easy updates, regular backups, and HIPAA compliance.
EHR Comparison Worksheet

How do your EHR choices stack up? Compare your top picks by inserting them into the below chart, which provides the top, must-have features recommended by EHR expert, Ron Sterling. By viewing the various software features side-by-side, you’ll be better prepared to make the right choice for your practice—and be that much closer to attaining your EHR goals.

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<tr>
<th>Feature</th>
<th>Product 1</th>
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<th>Product 3</th>
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<td>Health Maintenance Recommendations</td>
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<td>Procedure Scheduling Management</td>
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<td>Messaging Capability</td>
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<td>Diagnostic Interfaces</td>
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<td>Image Upload &amp; Management</td>
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<td>Patient Portal Integration</td>
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<td>Authorizations &amp; Disclosure Tracking</td>
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About Ron Sterling

Ron Sterling, president of Sterling Solutions, Ltd., is a nationally recognized thought leader on the selection and implementation of electronic health records (EHR). He authored the HIMSS Book of the Year, Keys to EMR/EHR Success: Selecting and Implementing an Electronic Medical Record, and publishes the popular EHR issues blog, Avoid EHR Disasters (www.Avoid-EHR-Disasters.blogspot.com). He's worked with a wide array of practices on EHR decisions and issues and has reviewed electronic medical record and practice management systems from more than 150 vendors.

About Kareo

Kareo is the only cloud-based medical office software and services platform purpose-built for small practices. At Kareo, we believe that, with the right tools and support, small practices can do big things. We offer an integrated solution of products and services designed to help physicians get paid faster, find new patients, run their business smarter, and provide better care. Our practice management software, medical billing solution, practice marketing tools and free, award-winning fully certified EHR help more than 30,000 medical providers more efficiently manage the business and clinical sides of their practice. Kareo has received extensive industry recognition, including the Deloitte Technology Fast 500, Inc. 500/5000, Red Herring Top 100 Company, and Black Book #1 Integrated EHR, Practice Management and Billing Vendor. Headquartered in Irvine, California, the Kareo mission is to help providers spend their time focused on patients, not paperwork. For more information, visit www.kareo.com.