

**NYeC**

NEW YORK eHEALTH  
COLLABORATIVE



# Health Home Implementation Series: Vendor Selection

24 January 2012

# Agenda

- Background on the New York eHealth Collaborative (NYeC)
- What is a “Health Home”?
- Key steps to Effective Vendor Selection
- Resources and Tools for Vendor Selection

# New York eHealth Collaborative

NYeC is a not-for-profit organization, working to improve healthcare for all New Yorkers through health information technology.

## **1. Promote the adoption and use of electronic health records**

- Educate the public on the benefits of EHRs
- Assist providers transitioning from paper to electronic records
- Assist providers to qualify for Meaningful Use reimbursements

## **2. Build the SHIN-NY (State Health Information Network – New York): a secure network for sharing electronic medical records across the state**

- Allow providers to share information
- Promote collaborative care so doctors work as a team to benefit the patient

## **3. Develop statewide policies regarding HIT**

- Convene stakeholders and build consensus
- Collaborate with NYS Department of Health

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## Health Homes

- Patient-centered systems of care facilitating access and coordination of: primary and acute physician services, behavioral health care and long-term community-based services and support.
- Expands on the medical home model linking and enhances the integration of medical and behavioral health care to better meet the needs of patients with multiple chronic illnesses.
- The aim is to improve quality and clinical outcomes while reducing the per capita costs through more cost-effective care.

## Capabilities a health home must have

- Provide quality-drive, cost-effective, and culturally appropriate person- and family-centered health home services
- Coordinating and providing access to preventive and health promotion services
- Must develop a care plan for each individual that coordinates all clinical and non-clinical services and supports to address the person's health-related needs.
- Use HIT to link services, facilitate communication between and among providers, individuals and caregivers and provide feedback to practices.
- Establish continuous quality improvement program, and collect and report data that support the evaluation of health homes

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# Key Steps to Vendor Selection

**1**

Research the market

**2**

Obtain buy-in

**3**

Educate vendors on your project

**4**

Rank software vendors

**5**

Reference and sustainability check

**6**

Prioritize your requirements

**7**

Identify list of potential vendors

**8**

Evaluate live demonstrations

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Gather & compare price quotes

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**Review the software license agreement**

## Step 1: Do your research

- The goal is to increase your knowledge about the software landscape
- Develop context so you can evaluate vendors knowledgeably
  - Take the time to learn industry terminology and how it addresses your specific needs
- Try to identify how your office can become more efficient and achieve the health home goals
  - Make the large investment go a long way
  - Understand the need functionality to achieve care coordination needs

Tool:  
Workflow  
Optimization Tool  
Kit

## Step 1: Do your research

- **Certified HIT Product List** (CHPL) provides a comprehensive list of complete and modular EHRs that have been tested by ONC and certified for meaningful use.
  - ❑ Ambulatory Care EHRs – 1, 108 (702 complete EHRs)
  - ❑ Inpatient EHRs- 548 (134 complete EHRs)
- Meaningful Use provides a framework and guidance of activities that a provider do to optimize use of technology that supports effective documentation and the ability to improve care provided
  - ❑ Specific functional features ( core and menu set objectives)
  - ❑ Required testing across several clinical quality measures

<http://onc-chpl.force.com>

## Step 1: Do your research

- **Review Certification Bodies.** The Certification Commission for Health Information Technology (CCHIT) and other credentialing establish definition for what capabilities and EHR should contain. CCHIT certifies:
  - ❑ Ambulatory EHRs;
  - ❑ Inpatient EHRs;
  - ❑ Emergency Department EHRs;
  - ❑ Long Term and Post Acute Care EHR; and
  - ❑ Behavioral Health EHR
- The test script criteria and a roster of products are made available on the CCHIT website

<http://www.cchit.org>

## Step 1: Do your research

- **Medical Societies and Departments of Health.** Have surveyed their membership and/or critiqued vendors that claim to support a specialty or particular niche.
- **Local Regional Extension Centers (RECs).** RECs nationally have evaluated many vendor software applications to ensure basic functionality exists to support MU, care coordination and interoperability. There are two RECs in NYS:
  - New York eHealth Collaborative (NYeC) [www.nyehealth.org](http://www.nyehealth.org)
  - NYC REACH ( covers the 5 boroughs) [www.nycreach.org](http://www.nycreach.org)
- **Local Extension Agent and RHIOs.** Regional organizations skilled in EHR assessment and deployment and HIE.

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## Step 2: Prioritize Your Requirements

- Understanding your organizations needs is an important component of the vendor selection process
  - Identify the operational challenges you may want to solve (document current state workflows and inefficiencies)
  - Map out HH requirements you need to fulfill and potential gaps in existing processes
- Involve all departments who have roles in your organizations key workflows and in the HH activities
- After identifying the requirements rank them “Must Have” versus “Nice to Have”

Tool:  
EHR software  
evaluation  
spreadsheet

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## Step 3: Engage Management

- Identify the decision makers and those who must approve the project
- Make a compelling case for your proposal
  - Identify existing challenges
  - Present the case for additional functional needs
- Communicate how the software will address the organizations needs
  - Improve charge capture
  - Government compliance
  - Support of care coordination
- Summarize budgetary requirements for the purchase
  - Indirect costs
  - License costs
  - Interface costs
  - Training costs
- Secure approval to commence search for your software products

Tool:  
Fort Drum  
Financial  
Planning Tool

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## Step 4: Identify list of vendors

- Rule of thumb is that you should not look at more than 5 software products. So to reach your target list:
  - Eliminate systems that do not support your specialty
  - Eliminate systems that do not support your organizational size
  - Eliminate systems that do not include your “must have” capabilities
- Determine the cost of the software
  - Rule out applications that are too expensive
- Conduct and request for information (RFI)

Once you have your short list, engage the vendor in a demonstration

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## Step 5: Educate the Vendor on Your Project

- The more a vendor understands your organizations need the better they are able to demonstrate how their product meets your needs
  - Communicate the critical functional features you expect a software to support
  - Explain to the vendor the unique specifications of the Health Home
  - Describe your expected implementation timeline and goals
  - Share the names of the other systems you are considering

# QUESTIONS?

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## Step 6: Evaluate live demos

- See the system in action ( some vendors provide opportunities to try the system free of charge)
- Provide prospective vendor with a demo script (script should reflect desired workflow)
  - Highlight the features and functionality you need
  - Request demonstration of the reporting requirements and data aggregation activities of the system
- Demo participants should include a range of organization staff
- Use a scorecard to document your thoughts about the software
  - Evaluate usability, completeness and functional capabilities
  - Gather feedback from the entire team

Tool:  
EHR software  
evaluation  
spreadsheet



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## Step 7: Rank the Software

- Identify the systems that include your “Must Have” requirements
  - Rank on ease of use
  - Rank based on which systems adhered to your script
- Eliminate those applications that do not meet your needs or require significant development
- Schedule a second demo of the highly ranked software
  - Take a deeper look at system capabilities, configuration options and data organization
  - Communicate your interoperability requirements
  - Ask about the development roadmap

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## Step 8: Gather and Compare Price Quotes

- Price should not be the only decision maker...
- Obtain detailed price quotes from your key vendors and provide sufficient data so the prospectus is accurate
  - Cost of license
  - Cost of interfaces ( laboratory, immunization, RHIO connection, data conversion)
  - Cost of customization
  - Cost of reporting tools
  - Cost of support and training
  - Cost of upgrades
- Request a copy of the service agreement

**Note:** Deployment options vary by vendor- compare apples-to-apples (e.g. SaaS to SaaS)

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## Step 9: Verify References and Assess Sustainability

- Talk to existing users of the system that look like you
  - Inquire as to what they do not like about the system
  - How responsive is the vendor to support inquiries
- Ask about how well the implementation went and things they would have differently
- Ask vendor about their financial position and strategic viability

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## Step 10: Review the Software License Agreement

*Get the best deal before you buy!*

- Ask about industry discounts; it doesn't hurt
  - Purchase through organizations that can negotiate pricing
- Understanding the up –front versus ongoing costs
- Look out for auto-renewal clauses as applicable by state law

Tool:  
Contracting Best  
Practices



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# Tools and Resources

Tool Name	Description
Workflow Optimization toolkit	Developed in the SCP process. Includes several documents to guide redesign of clinical processes
EHR software evaluation spreadsheet	Spreadsheet to support the ranking of system software
Fort Drum financial planning Tool	Spreadsheet to aid in the budgeting for Health IT implementation
Contracting Best Practices	Document drafted by RECs and EHR outlining contract terms a purchaser of technology should pay attention to.

Documents will be posted the week of February 6th on the New York eHealth Collaborative Website and accessible from the resources link

<http://www.nyehealth.org/>

## Final Thoughts...

- Think about how your HH will begin to coordinate care across the different care:
  - Evaluate your workflow and envision what it should be to support coordination
  - Does the desired technology vendor (s) support the interfaces, documentation needs and coordination modules
  - What additional tools do we need to develop or purchase to connect the HH
  - What types of data will you need to share (CCD, plans of care, therapy sessions)
- Talk to other HH applicants, RHIOs and stakeholders
  - Learn from others what models exist and what works
  - Understand the capabilities in the market; make informed decisions

## HH Implementation Session 2: Privacy and Security

- **Presenter:** Sharon Bari, Training Coordinator at NYeC
- **Date & Time:** Thursday, February 16, 2012 2:30 pm eastern time
- **Registration Link:** <https://cc.readytalk.com/r/unkrz8j5er7p>

All training sessions ( recordings and registrations) will be made available on the Medicaid website.

Once confirmed an email from OHITT will be sent to all health Home applicants advising the calendar on the Medicaid site is complete.

## Questions...

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