Effective Demonstrations for Electronic Health Record Systems

Software demonstrations (demos) are the best way to get a feel for how well a product will work within your practice, how supportive the vendor will be to your staff as they adapt to the product, and how well your staff will respond to the product. Unless approached systematically, however, demos can be frustrating and a significant waste of time. The end-goals of a demo are to:

❑ Define how well, or if at all, the EHR system meets your practice's requirements.

❑ Develop an understanding of how the product/system performs each function.

❑ Gain an understanding of how intuitive the system is to use.

❑ Develop a comfort level that the system features are sufficient to support the unique tasks, specialties, workflows and challenges of your practice.

❑ Involve key staff in the evaluation and selection process to raise the level of understanding of EHR capabilities and garner buy-in to a vendor decision.

❑ Obtain answers to all of your questions and develop a rapport with the EHR vendor.

These tips will help ensure you get the most out of your demos to help you identify the right product for your practice.

1. Limit Demonstrations to the Top 2 to 3 Vendors Only

Detailed demonstrations that will help support a future purchase decision will take significant time to complete. Therefore, full demonstrations should be limited to only the vendor systems that, through other evaluation activities, have been selected as the best possible match for your practice's requirements.

Vendors that make it to the demonstration stage of your system evaluation process should have already been thoroughly researched via the Web, and through the use of published vendor comparisons measured against your specific requirements criteria. Vendors who understand that they have been carefully selected for demonstration participation through a structured and informed process will know you are a serious buyer, will be more accommodating to your review approach, and more interested in scheduling the best demonstration teams for your visit.

2. Develop Scenarios Ahead of Time

Your practice has identified a number of goals and expectations you wish to achieve through the purchase and implementation of an EHR system and has, undoubtedly, spent some time envisioning how, ideally, the system will work within your practice to meet these goals. Certain EHR systems will support your vision better than others. The demonstration process is the perfect forum in which vendors can "audition" their products, and your practice can measure their capabilities against your vision for EHR system use within your organization.

Comparison is most effective when you have scripted and conducted the demonstrations using real-life scenarios from your practice. To gain the most from the demonstration process, develop scenarios that describe a patient visit from the point of arrival at registration through the clinical visit including orders, and through receipt of results and follow-up activities. Scenarios should include both the usual and more unique patient visits that occur within your practice. They should also include

non-patient visit processes that currently involve retrieving the paper medical chart for reference or filing (e.g., prescription refill requests, receipt of consult reports, patient calls for physician/nurse advice).

It will be necessary to provide these scenarios to the vendors several weeks in advance of the scheduled demonstration dates to give them time to prepare.

3. Schedule Sufficient Demonstration Time to Effectively Evaluate the System

Clinician and other resource time is valuable and pulling these individuals from their daily responsibilities to participate in system demonstrations is often very difficult. However, their focus on the demonstrations is critical. The EHR system will be a significant investment for your practice, and it will succeed or fail based on the clinicians' comfort and satisfaction with it. Unless they can fully participate in all aspects of the demonstration, it will not be possible to determine how well the system will work for them. Additionally, through participation in scripted demonstrations based on their daily clinical scenarios, they will begin to formulate how clinical processes and communication will change through automation to assist them in planning for the future.

Scheduling review of technical issues, separate from functional capabilities, can help reduce participant involvement to only the review activities applicable to their interest and responsibility. Often vendors wish to hold technical reviews via conference call with their technicians responding to questions with practiced IT representatives. This is an effective and productive way for the practice to get technical detail.

Depending on the number of scenarios prepared, effective demonstrations for an EHR system should be expected to require three to four hours. The time investment, however, is well worth it in the knowledge and confidence participants will gain in making an informed EHR system decision.

4. Schedule Demonstrations as Close Together as Possible

If at all possible, it is best to schedule all the demonstrations as closely together as possible to help assure participants' memories remain fresh as to demonstration process and findings. Demonstrations drawn out over months tend to become less structured and consistent, making a true "apples-to-apples" comparison of products difficult to accomplish. Ideally, demonstrations for the top vendors would all be completed within one week, but having them occur within a few weeks of each other can work if the participants, format, and structure remain the same from one demonstration to the next.

5. Appoint and Effective Facilitator/Leader and Control the Demonstration Process

System vendors are anxious to show off their software, and even the best of vendors will regularly stray from the agenda and scenarios to highlight the "bells and whistles" of their system. This can be exciting, but can also distract the participants from review of the most critical features for your practice, and waste the valuable time of your clinician participants. It is very important to appoint a facilitator who is forceful and focused to lead the demonstration process and hold the vendor accountable for completing the scenarios within the designated timeframe. One method that is often successful is to reserve 20 minutes at the end of the demonstration process for the vendor to show features not included in the scenarios but, possibly of interest to participants. This provides incentive for the vendor to stay on schedule, in order to assure the last 20 minutes to highlight special features remains available, before participants exit.

6. Prepare the Demonstration Participants

It is always best to include as many people as possible from your practice in the system demonstrations to help raise the level of EHR understanding within the practice, get as many perspectives as possible viewing the capabilities, and help to garner maximum support through involvement in the EHR decision making process. Each person participating, however, needs to be fully prepared and aligned with the goals of the demonstration process. They need to be knowledgeable as to the requirements and priorities decided on by the practice Selection Team, and be familiar with the scenarios and scripted approach planned for the demonstrations.

A few guidelines for participants to help demonstrations go smoothly include:

❑ Never talk about another vendor's product or demonstration in front of the vendor. Someone within the practice has signed a confidentiality agreement prior to the vendor's scheduling of the demonstration, and these types of comments are specifically prohibited.

❑ Although some enthusiasm for some features can be expected, this is not the only step in the evaluation process, and the practice will maintain the best negotiation approach if the vendor does not feel that they are the "clear winner" based on statements made by participants during the demonstration process.

❑ It is critical to follow the scripted process and scenarios to assure key functions are addressed, and all demonstrations are as similar in content as possible to make it possible for direct comparison. The facilitator may need to redirect the vendor to meet the demonstration goals. Participants should be aware of the facilitator's role and the agenda restrictions to assure full cooperation.

7. Don't Be Shy About Asking Questions

Questions by participants should be encouraged. Unfortunately, many people feel intimidated when viewing software demos, especially when they do not fully understand something they see or hear. Because a demo should be as much about understanding how well the software will support your practice as it is about seeing how the software works, participants should ask as many questions as necessary regarding how capabilities of the software relate to your specific practice needs.

Good vendors will do all they can to educate you on the capabilities and limitations of their products. They will answer your questions completely and leave you with a clear understanding of what their product can do you for your practice's operational needs. Never hold back from asking questions or asking for further clarification to avoid any future misunderstandings.

8. Record Findings and Impressions as You Go

Although understanding of capabilities and specific impressions will seem quite clear during the demonstration, these will become "fuzzier" as time passes and as other demonstrations of other products are conducted. The best approach for tracking findings, issues and impressions is to record these as the demonstration progresses in an organized and consistent fashion. Prior to the first demonstration, the practice should prepare an evaluation form that lists, in one column, the key aspects of the scenarios in order of the scripted demonstration process, with a second column blank for recording comments and concerns. It is also very useful to have a third column where participants are asked to enter a score (either A through F or 0 through 5) indicating how well they feel the vendor system supports the specific aspects of each scenario. These scores and comments will provide key, objective data for comparing and contrasting vendors in support of your final vendor/system decision. They will also serve as invaluable documentation to help jog memories after many hours of product demonstrations by various vendors.

9. Maintain an Open Issues and a Commitment List

While the demonstrations are in progress, the vendor can be expected to have a number of instances where they will need to verify something with other resources within their organization, and will promise to get you a response. Additionally, they will also make statements throughout the demonstrations that they will include that feature (or customization or added support) as part of your agreement at purchase. Both sets of these commitments need to be documented as the demonstrations proceed to be sure they are not forgotten. At the end of the demonstration, it is recommended that both lists be read back to the vendor and participants to assure clear understanding of expectations for response.

10. Hold a Quick Debriefing Session with Participants Immediately Following Each Demonstration

As a last step in the demonstration process, it is advisable to hold a brief caucus with the participants (in a separate room while the vendor dismantles equipment) to solicit general impressions and concerns. For any participants who haven't completed their evaluation forms, this is an excellent time to do so while information is fresh in their minds. This open discussion of general impressions will help the group clarify questions and concerns amongst each other, and will also raise additional questions for the vendor that should be included in follow-up communication. Appoint someone to capture the comments in writing, or record the session for future reference if needed.

Following these steps will help you gain the greatest possible understanding of each system's capabilities. It will also provide you with valuable ideas and insight for effective EHR implementation planning.