OUTLOOK ASSOCIATES
A Division of Qualis Health

Tips for Success

Vendor Reference Checks & Site Visits

Structured, detailed demonstrations will provide your practice with an excellent understanding of the system functions and features, and the technical environments in which the leading systems operate. Demonstrations, however, do not provide sufficient opportunity to gain the same level of understanding about the vendors on whom you will rely for the support of your system for many years to come. Does the vendor meet its deadlines? Are new system releases reasonably "bug free"? Is customer support responsive? Knowing answers to these and similar vendor performance and reliability questions is essential for making the best informed EHR system decision for your practice. Answers to these types of questions, prior to making your decision, are best obtained through discussions with vendors' clients who are already using the systems you are considering. These discussions can occur through a combination of telephone reference calls and on-site visits to practices.

The goals of vendor reference verification are to allow you an opportunity to:

- ❑ Verify information provided by a vendor with others who have a close working relationship with the vendor and experience with the system you are considering.
- ❑ Gain insight into the effective use of EHR systems in "live" environments.
- ❑ Validate your own plans, proposed timelines and expectations of the vendor with other objective, experienced practices.
- ❑ Learn the lessons gained by others and avoid the pitfalls of those who have gone before you.

Referenced verification should be completed for the 2 – 3 "semi-finalist" vendors. Often practices choose to conduct reference calls before organizing demonstrations and follow up with site visits with the finalist vendor only. However, conducting reference verification following demonstrations often allows you to be more knowledgeable about the system and specific features to better organize and articulate your questions, and fully comprehend responses.

The following provides a set of useful tips and suggestions for getting the best possible information about each of your leading vendors and systems through discussion and meetings with other vendor clients.

1. Choose Reference Sites as Similar as Possible to Your Practice Environment

References and site visits will be most valuable if the clients with whom you communicate are similar in size, specialty, patient mix, business structure and clinical operations as your own practice. Your leading vendors should be willing to provide you with complete client lists that include descriptions of the clients' practices from which to choose.
Vendors will try to lead you to client references with whom they have the best possible relationships. You will want to evaluate whether you feel others might give you more forthright information and question the vendor about other options. Keep in mind, however, that you will be able to obtain other reference sources as part of your discussions with vendor clients. You will want to make some contact with every possible reference source to gain the most comprehensive perspective possible as to client satisfaction.

2. **Include Key Practice Personnel and Align Communication with the Reference Participants**

   Questions and items for clarification will span many areas of your practice and it will be important that the key physicians/clinicians and staff within these areas have an opportunity to talk with reference sites to ask their questions and hear the responses provided. Client sites are usually very willing to share their perspectives and "lessons learned", especially in discussions with a peer. Therefore, arranging physician to physician, nurse to nurse, business office manager to business office manager communication with the reference sites is highly recommended. During site visits, this aligning of peers between your practice participants and those of the client will allow your team to observe "live" use of the specific functions of most interest to them.

3. **Prepare a Detailed Question Check List**

   A documented set of specific questions will help to keep the reference call or site visit organized and focused. You will want to include questions on actual use of functionality, technology choices, implementation process, learning curves and satisfaction with on-going support. Asking "lessons learned" questions (e.g., if you were starting again, what would you do differently) usually provides an excellent opportunity for the interviewee to provide valuable insight into potential pitfalls and raise other issues you may not have thought to ask. Participating team members will have questions specific to their own areas of interest and should be encouraged to document these as part of the reference materials. Providing these questions to reference clients in advance will usually yield more complete and thoughtful answers.

4. **Exclude the Vendor from Participation**

   While the vendor will wish to be included in communication with their client references, their involvement will usually interfere with full and open communication. Clients are more willing to talk openly if the information they provide is between peers and is promised to be kept confidential.

5. **Be Respectful of Time**

   The reference site is providing a significant favor by sharing their lessons and time with your practice. It is important that you remain aware of the time burden your call or site visit will place on the client practice and organize your efforts for maximum efficiency and client convenience. While you want to be sure to see the system in action during a site visit, doing so during a less busy time for the practice will allow you greater time for questions while still observing actual system use.

6. **Document What You See and Hear**

   You will want to take detailed and careful notes throughout the reference process for later review and discussion among team members. Memories will fade over time and this information may prove to be very valuable to you during negotiations and implementation if you move ahead with the vendor. Additionally, as different participants are obtaining information from other individuals within the client practice, you may find that you have received inconsistent information. Inconsistencies need to be weighed and perhaps reconfirmed with the reference site or with the vendor.

7. **Weigh the Importance of Information to Your Practice**

   Expect to hear some good and some bad about the system and the vendor. Keep in mind that what may be good or bad from the perspective of the reference site, may not be the same for your practice. This is the time to go back to the goals and priorities you have established for the EHR system earlier in your evaluation process and assess the reference information collected from this perspective.

It is also important to understand that sometimes issues with implementation and support can result equally from problems created by the practice as those initiated by the vendor (e.g., the practice did not have a knowledgeable project manager leading the effort, new staff members within the practice are not sufficiently trained and rely on the vendor's customer support line for basic understanding, etc.). Sometimes you can gain insight into the practice's appropriate self-sufficiency and sophistication during the site visit. This should be weighed when evaluating the information gained.

8. Keep the Door Open for Future Communication

The individuals you speak with and visit as part of your reference verification will be invaluable sources of information to you in the future if you proceed forward with the same vendor. They have already been through the negotiation and implementation tasks you are facing and will have excellent pointers and information to help your processes go more smoothly. As you move beyond implementation to effective use of your EHR system, they will prove to be a valuable peer group for brainstorming and sharing new ideas. A thank you and note of appreciation for the time spent talking to you in the reference verification will help to keep the door open for many further conversations.

9. Reconfirm as Needed with the Vendor

It is important to honor the confidentiality requests of any client with whom you have spoken. It is also important, however, for you to be able to confirm some of the information received and/or further question the vendor on specific concerns raised. Conducting four to five reference verifications and holding vendor questions until all are completed will allow you the opportunity to make the specific source of some information more anonymous and will allow you to balance input from multiple sources before addressing your questions to the vendor.

10. Include What You Have Learned in Negotiations

Certain issues or concerns with the system or vendor can be addressed and corrected through contractual requirements negotiated at the time of system purchase. While issues related to poor system testing, poor customer service response and other major support flaws should be considered warning signs to look to another vendor for EHR capabilities, other issues raised during reference verification are commonly negotiated as contractual performance criteria tied to vendor payment. These issues may include assignment of a trained and knowledgeable vendor project manager, inclusion of sufficient on-site training hours, and upgrade acceptance testing. You will need to evaluate negative information with a lawyer, consultant or other knowledgeable resource to fully assess contractual approaches for mitigating problems for your practice

Learn all you can about your prospective vendor prior to deciding to move forward with your purchase. The system will be a critical component in the future of your practice, but the vendor will be the source of support for assuring the system works effectively, upon implementation and into the future, and your partner in achieving the goals you have for your EHR system.