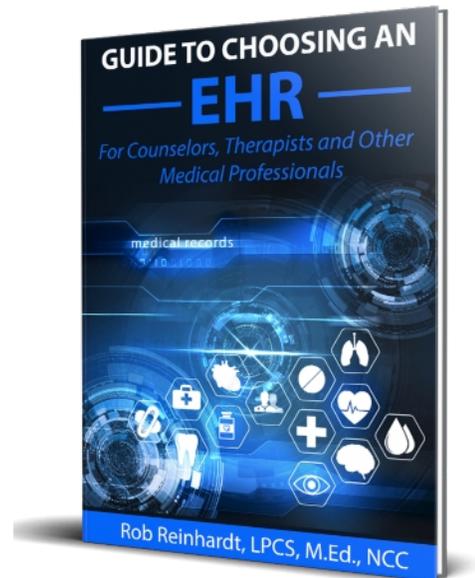**TAME YOUR PRACTICE**

Mini- Guide to Choosing an EHR

by Rob Reinhardt, LCHMCS

Preview Edition of

Available at

amazon

TAME YOUR PRACTICE

Mini-
Guide to Choosing an EHR

The Legal Stuff

Following is a set of recommended guidelines and steps to follow when selecting an EHR that is a best fit for your private practice. This information is presented as a general guide to cover many private practice situations. However, it cannot be guaranteed to be the best process for any one particular situation and no specific results can be guaranteed.

The information contained in this guide is for informational purposes only. Advice contained herein is based on my personal experience and does not constitute legal or financial advice. Appropriate legal and financial professionals should be consulted prior to making decisions that will affect your business.

Please understand that there may be affiliate links contained in this guide from which I benefit financially. None of these links are associated with any specific EHR, and the information in this guide is not influenced by or intended to recommend any one specific EHR.

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TAME YOUR PRACTICE

Mini- Guide to Choosing an EHR

by Rob Reinhardt, LPCS, M.Ed. NCC
CEO of Tame Your Practice
Creator of Describe
Co-Author of Private Practice Preparedness

Hello friends and colleagues,

My name is Rob Reinhardt and I'm known as "that guy who knows all about behavioral health EHRs."

This all started in 2010 when I went in search of a cloud-based practice management system that could address all of my needs. By the time I was done, I realized I had a wealth of information worth sharing with other mental health professionals. In 2012, this lead to Tame Your Practice reviews of EHRs that have been updated on a regular basis ever since then.

I also realized that I could help other therapists and counselors who didn't have the extensive technology and business background and knowledge-base that I do. I was told by several colleagues that I had a knack for explaining technology and business concepts in a way that everyone could understand.

So, I started my EHR/Software Selection Consultation service, helping mental health professionals identify the "best fit" EHR for their practices. I also helped them understand how to make technology and business decisions that would help them meet their goals, while complying with Ethics and HIPAA.

While I've always had helpful blog articles available to help with this process, I finally sat down to distill my years of experience helping people, into this guide.

Thank you for all who have followed, consulted with, and offered words of encouragement and support for my work through the years. This guide is dedicated to all of you as well as those just now discovering it. I hope you find it helpful in selecting a great fit EHR, so that you can focus more of your time on the wonderful work that you do!

Rob Reinhardt, LCMHCS

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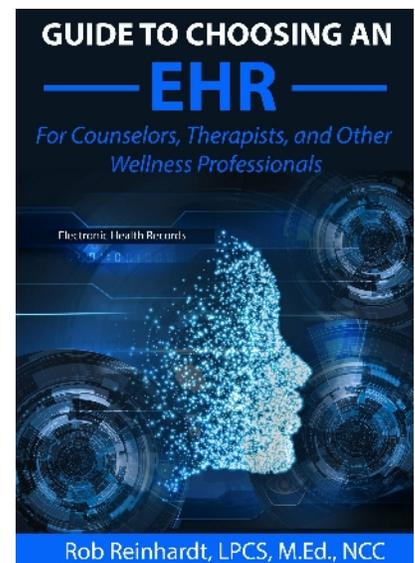
A Brief Note About this Free Mini Version

It's important to choose an EHR that will meet your needs for years to come. Changing EHRs is no easy task, and not something you'll want to do any time soon. Many of us "just want something that works" so that we can get back to the important stuff: working with clients. However, investing time in your EHR selection now, will save you even more time and countless headaches down the road.

The Free Mini-Guide to Choosing an EHR provides a brief outline for the process of effectively choosing an EHR. It's a great tool for providing you a general idea of the five steps to choosing an EHR that's not only a good fit for you clinically, but also for your practice/business. It's purpose is to get you thinking about EHR selection as a process that needs to be taken seriously, somewhat slowly, and broken down into steps.

The outline in this guide, however, is just that…an outline. If you'd like more details about each step of the process, including:

- Checklists that walk you through the entire process
- Important questions to ask yourself, your colleagues, and EHR vendors before choosing an EHR
- Details about what features to look for in an EHR
- Insights into the benefits of using an EHR
- Information on negotiating rates for your EHR
- Details about Meaningful Use, Health Information Exchanges, and other programs that may affect your EHR choice.
- Recommendations on how to ensure you continue to get what you need out of the EHR you choose
- Tips on Implementing an EHR
- and much, much more

Purchase the
full version of this eBook.

GUIDE TO CHOOSING AN
EHR
For Counselors, Therapists, and Other Wellness Professionals

Electronic Health Records

Rob Reinhardt, LPCS, M.Ed., NCC

Who Is This Guide For?

This guide is intended for behavioral health private practices and agencies of varying sizes. Because it is intended for such a wide array of organizations, there may be some sections/items that are over-simplified for large agencies, and some that are unnecessary for solo and small private practices. My goal is to make this guide as user-friendly and approachable as possible. The framework is there, but the details may need to be adjusted for your use.

So, Which Sections Apply To Me/Us?

In almost all cases, each section, and even item, in this guide will apply to all situations. It's a matter of degree how MUCH each section may apply. For example, one of the first things a large organization should do is organize a team to represent different departments, to explore the possibilities of using an EHR. For a solo practitioner, that team may consist of only themselves, but also may benefit from consulting with their CPA, attorney, and technical support person. The size of the team may differ in the two scenarios, but the decision regarding the makeup of the team still needs to be made by both.

Note that, throughout this guide, I use the word "practice". Feel free to mentally substituted whatever term best fits your situation (e.g "agency", etc.).

Do I Want an EHR? What about EMR? Practice Management System?

Often, terms like EMR, EHR and Practice Management System are used interchangeably. It's important to note that the term EHR takes on specific meaning with regard to the Meaningful Use initiatives of the Affordable Care Act. EMR or Electronic Medical Record, refers to an electronic version of a client's chart and can take many forms. EHR, or Electronic Health Record, is an EMR plus Interoperability. One of the primary goals of the Meaningful Use program, and many states' Health Information Exchange (HIE) initiatives, is to increase efficiency and quality of care for clients, by encouraging sharing of medical data between providers. The idea is that this can be accomplished by using EHRs that can share data with one another. This is the concept known as interoperability.

To that end, the Office of the National Coordinator oversees a certification program so that you can identify EHRs that meet the requirements of the Meaningful Use program. These EHRs are referred to as ONC-Certified.

So, what then is a Practice Management System? A Practice Management System goes beyond the required features of an EHR, providing features like billing, insurance filing and more.

One thing to be keenly aware of when evaluating EHRs is that EHR is also a high value marketing term. Because of this, many vendors use the term EHR in a more generic sense. Not every product that is marketed as an EHR is an ONC-Certified EHR. Some in fact, are a great fit for a solo mental health private practice, but a terrible fit for a large organization with significant compliance needs.
Part of the EHR selection process for an organization, is determining exactly what form of EHR is a good fit. The form, in large part, will be determined by your desire and/or requirements to participate in the Meaningful Use and/or HIE programs.
Note: Throughout this guide, I use EHR and Practice Management System interchangeably.

Overview

It is challenging and time consuming to switch from one EHR to another, so choosing one that will work for your practice long-term is important.

To be successful, due diligence will be imperative.

Some of the biggest mistakes I've encountered over the years, were made by practices that largely based their choice of EHR on what others were using.

While it is important to listen to feedback and experiences from others, those factors should only be single factors among many others in the decision-making process.

Your practice, its needs, and priorities may vary widely from other practices. So it's important that you start with your own needs, not the needs of others.

Maintain

Implement

Evaluate

Assess

Conceive

Step By Step

Choosing a best fit EHR involves much more than a demo, free trial, and making the final decision.

It also involves understanding your motivations for using an EHR, crafting a prioritized list of needs you expect the EHR to fulfill, and continuing to evaluate your choice well after implementation.

Even if you ultimately make an excellent choice, you can only achieve the best possible return on investment if you give adequate attention to each of these steps.

IMPORTANT - As you go through these steps, I encourage you to think about both current AND future goals. As part of the Conceive step, establish a vision of what you expect your practice to look like five years from now. From there, be sure to answer the questions in this guide from both the perspective of where your practice is now, and where you expect it to be in the future.
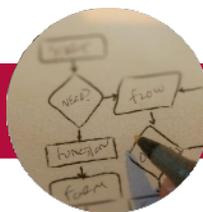
Conceive

During the initial, or "Conceive" step, your practice engages in beginning thoughts and consideration of implementing an EHR system. Here you gain a basic understanding of terms, benefits, and goals for your practice before moving to the Assess stage. It's important that you leave this stage with clarity regarding your reasons and goals for implementing an EHR. Are you interested in cost and time savings? Meeting an ethics or regulatory need? Wanting to improve efficiency in order to spend more time with clients? All of the above?

(The full version of the Guide to Choosing an EHR includes over a dozen guiding questions to help you with this process. It will help you develop a complete picture of why you want to implement an EHR to help ensure your goals are met!)
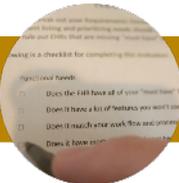
Assess

So, your practice has gone through the Conceive step and decided it would be beneficial to explore implementing an EHR. Now it's time to do a Needs Assessment. During the Assess stage, your goal is to detail the practice's needs associated with EHR. The result is a Requirements Document that can be used to evaluate prospective EHR products and determine which one best fits the needs of the practice. This Requirements Document can be created in whatever format you feel most comfortable with. This could be an Excel Spreadsheet, a Word document, a Trello board, or even a tablet of paper.

It's important to have this down on paper or risk forgetting the importance of some of your needs while in the midst of a shiny demo with a sales rep. It's easy to get distracted by bells and whistles and forget to examine other important details.

(The full version of the Guide to Choosing an EHR breaks the assessment down into four areas: Functional, Technical, Operational, and Transitional. While many people focus just on the features they want, it's important to also properly prioritize your business, security, training, and other needs that are connected to the implementation and use of an EHR. The full guide includes over a dozen questions for each of these areas to ensure you choose an EHR that meets ALL of your needs; or at least as many as possible!).

Evaluate

Now that your practice has completed a needs assessment, it's time to see which EHRs match up well against your requirements document. This step itself might be broken down into two or three larger steps for the purposes of narrowing the field of EHRs. Each individual EHR and Vendor should be measured against your Requirements Document to evaluate how well it will meet your needs. The goal should be to reduce your options to no more than 3 by the time you get to the Trial phase. Here is where it pays off if you have already assigned priorities to your needs, making it easier for you to compare systems.

(The full version of this Guide includes guiding questions, not just about comparing feature lists, but also evaluating costs, vendor reputation, support options, and tips on negotiation. Within each of those sections, further details are explored. For example, your costs may not be simply relegated to an up front or monthly fee that you pay the vendor. Additional costs for hardware, training, and transition need to be included in your evaluation, so you can avoid unwelcome surprises!)

Implement

Even if the EHR you choose feels like a solid fit, it's important not to jump ahead too quickly. While I spend much less time covering this step, that doesn't mean you should spend less real time on it. The best tool can be dangerous in untrained hands and a poor implementation plan can cost you significant time and money. The key to success lies in having a detailed plan that covers all the bases. One primary goal is to establish a plan that minimizes disruptions to daily operations. So, what are the core things to address in an implementation plan?

(There's more to implementation than just flipping a switch. The full version of this Guide includes a list of questions to help you create a foolproof implementation plan, saving you price of costly delays and bumps in the road).

Maintain

While you've crossed the biggest hurdles once you are past implementation, the work isn't over. It's still be important to have processes in place to allow for ongoing evaluation of all aspects of the EHR and its role in your organization. Efforts should be made to identify where things are working well and where there are opportunities for improvement. Do adjustments need to be made in the EHR? Or in how you and your staff use it? If you've done a thorough job with the previous steps, you should see a significant payoff here.

And finally, you've made it! Even though use of an EHR requires ongoing maintenance, training, and oversight, if you've been diligent during the selection process, it should fade into the background a bit and become a more seamless facet of your organization and its processes.

> If you've found this guide helpful, have everything you need, but want to offer support/appreciation, consider purchasing Describe (a deck of activities for individuals and groups of all ages)! Also available on Amazon.

Need More Help?

Making the correct EHR decision now can save you a lot of time, money, and trouble down the road. I've been happily helping mental health professionals with this process for years, either by guiding them through the entire process, or simply helping them with matching their Readiness Document to EHRs. The three primary ways I provide help are:

Reviews - I have posted reviews of many of the currently available EHRs. The information there goes a long way toward helping people understand the differences between the offerings.

Consultation - Some people prefer to talk through their decision process and, get immediate feedback from an experienced expert on the topic. Want to be extra sure about your decision on EHR, software, or other business decisions before moving forward? Then I believe you will find a one-on-one consultation with me to be of benefit.

Have questions about how I might help? Feel free to drop me an email or give me a call at 919.578.8263

- Want the detailed, 5-Step walk through?
- Find checklists helpful?

Get the full eBook version of
Guide to Choosing an EHR
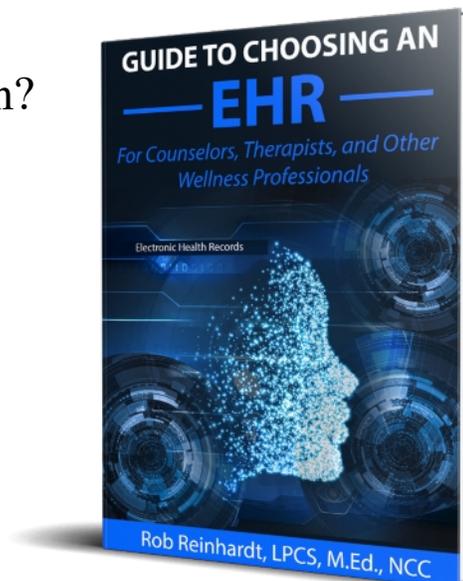
Additional Resources

An EHR isn't the only tool that can keep your practice running smoothly and efficiently.

Check out these additional favorites I highly recommend!

For Your Therapy Toolkit

Describe - A deck of cards with over a dozen activities and games for use with individuals, families, and groups of all ages.

Secure Email - Comply With HIPAA
Let your clients know that you value their privacy by using secure email. Hushmail will even allow you to embed a secure/encrypted contact form on your web site.

Web Sites
Create your own WordPress site and host it through SiteGround. I left another web host for SiteGround and have never looked back due to the stellar customer service.

Credit Cards
I've been using Square for several years and am quite happy with their service and fast deposit.

HIPAA Made Easy
Get your HIPAA questions answered, and help with compliance documentation through Person Centered Tech Support! Use coupon code TAMEIT to save 10%

Virtual Receptionist / Phone System
All Call Technologies, Virtual Receptionist system, allows you to affordably have all the perks of a professional phone system while still using your own office or cell phone. Further, they are familiar with mental health practices, security and HIPAA and will sign a Business Associate Agreement with you.

More Recommendations
See even more recommendations here!

Some of the links above are affiliate links. Please note that I only recommend services that I have personal experience with and I feel are the best of the best!