Table 9.1 Action Plan for Acquiring and Deploying an EMR System in a Physician Practice

Action Plan Objectives:

1. Consult with EMR system vendors about critical specifications, available options, and related costs.

2. Consult with physicians in the practice about their specific wants and needs in an EMR system.

3. Define a decision-making protocol for choosing an EMR system and vendor.

4. Establish and apply criteria for evaluating system options available from vendors.

5. Invite proposals/presentations from vendors.

6. Analyze and discuss options.

7. Select system and vendor.

8. Negotiate with vendor for purchase of system and related services.

Action Plan Metrics:

Signed system and services purchase agreement within six months. Initial system cost not to exceed $650,000; annual service contract cost not to exceed $90,000. Physician involvement in decision-making process—75 percent.

Specific Implementation Activities:

1. Consult vendors (weeks 1–4) Identify relevant vendors (IT staff) Request detailed information on products (IT staff)

2. Consult physicians (weeks 5–7) Initial meeting with physicians (IT manager, business manager, physician leaders, all physicians) Provide list of potential system capabilities (IT staff) Conduct written survey of physician wants and needs (IT and business staff) Second meeting with physicians to discuss system options and capabilities (IT manager, all physicians)

3. Define decision-making protocol (weeks 6–7) Draft decision-making protocol (IT and business staff) Discuss with physician and business leadership (IT and business staff, business and physician leaders) Finalize and approve decision-making protocol (business and physician leaders)

4. Establish criteria (weeks 8–9) Using information from vendor and physician meetings, draft criteria (IT and business staff) Discuss with physician and business leadership (IT and business managers, physician leaders) Finalize and approve decision-making protocol (business and physician leaders)

5. Vendor proposals/presentations (weeks 10–14) Invite vendors to make proposals/presentations (IT staff) Schedule presentations at the practice offices (IT staff, physician leaders) Debrief and critique the presentations (IT and business staff, all physicians)

6. Analyze options (weeks 15–16) Prepare summary sheet on the systems and vendors (IT and business staff) Narrow the number of systems and vendors to a few (IT and business managers)

7. Select system and vendor (week 17) Final meeting with physician and business leaders to make final decision (IT and business managers, physician leaders)

8. Vendor negotiations (weeks 18–22) Initiate negotiations with selected vendor for chosen system (IT and business managers, legal counsel) Complete negotiations and sign purchase and service agreements (IT and business managers, legal counsel)