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“Where Do I Start?”

From acute care to long-term care, home care to hospice, electronic medical records (EMRs) are no longer a choice, but a necessity. The right EMR can improve processes, facilitate quality care and regulatory compliance, minimize documentation errors, and drive sustainable savings. Indeed, selecting the right EMR can be critical to the success and even survival of your agency in the ever more competitive post-acute care (PAC) market. But for home health agencies (HHAs) and hospice providers looking for a quality EMR solution, the challenge can be daunting. All EMRs are not created equal, and all agencies do not have the same requirements. The investment in a new EMR is huge, and with the ever-evolving regulatory requirements and literally hundreds of EMR systems and vendors to choose from, it might be hard to know how—and where—to start.

So how do you find the right EMR for your agency?

What Exactly Is an EMR?

A good place to begin is understanding the name itself. An Electronic Medical Record is defined¹ as a digital version of a patient’s chart within a single healthcare organization or medical practice. The EMR record includes the medical history and other patient information recorded by clinicians and staff within that organization. Usually incorporating point of care documentation using web-based or cloud-based software on a mobile device, EMRs allow authorized users to create, manage, and extract patient data as necessary.

In the world of health information technology (HIT) the term EMR sometimes is used interchangeably with EHR (electronic health record). There is a difference, however. EHR systems conform to nationally recognized interoperability standards and include patient records from across the healthcare continuum: physician’s offices and pharmacies, hospitals and laboratories, long term and post-acute care (LTPAC)
settings. An electronic Health Information Exchange (HIE) is an EHR on a regional or national scale. Whatever the scale, however, your EMR system should enable seamless integration into a larger EHR.

But one size definitely does not fit all. That goes for an EMR system itself, and for the EMR vendor as well. The EMR that’s right for you should offer a system that is focused and individualized to your agency’s unique needs. The EMR vendor that’s right for your agency should recognize the impact their products and support can have on patient care and be committed to a relationship, not just a contract.

10 Signs It’s Time to Start Looking for a New EMR

If you’re reading this GUIDE, you probably already know it’s time for a change. But if you’re still not sure, read on.

Intuitive EMRs can transform agency operations. Easy-to-use EMRs with a minimum of technological frustrations allow agency clinicians to focus on patients, not computer screens. HHAs and hospice providers seek out new EMRs because they want to make their lives easier. There is nothing more frustrating than going through a long search for EMR software only to find out after implementation that the software—or the vendor—doesn’t meet your needs and expectations, or fails to deliver on its promises.

Is this you?

1. You are experiencing persistent performance issues.
2. Your staff cannot complete tasks efficiently.
3. You cannot adequately control operations.
4. You continuously need to use technical support.
5. Your vendor fails to meet deliverables on time.
6. Regulatory changes are late or last minute.
7. You are always adapting your processes to the software and not vice versa.
8. You have to perform reporting workarounds or resort to paper documentation for backup.
9. Your vendor does not have the capability to support your growth strategy.
10. Your vendor is focused on delivering new software, not on supporting current versions, such as yours.

If you found yourself nodding your head at many of the items above, then it’s time for a change. It’s time to start looking for a new EMR.
Five Key Steps in Selecting a New EMR

EMR software is not a commodity; it is a strategic purchase that will either help or hinder your profitable operation and growth. If you don’t take the time to properly source and evaluate EMRs with due diligence, then you may find yourself a few months down the road with a software system that is not right for your agency and does not meet your needs.

So it’s time to start looking: for an EMR system that can meet your agency’s unique needs… an EMR vendor that will follow through on pre-purchase promises…. an EMR solution that can offer smooth implementation, true operational flexibility, reliable ongoing support, and a real return on investment.

Following these five key steps will ensure that you are making the best and most informed decision for your agency’s present and future needs.

1. Know what you’re looking for: Evaluate your agency’s unique needs, and find out what is necessary for a quality EMR solution.
2. Evaluate the market: Find out how and where to look for a system that’s right for your agency.
3. Find out what others have to say: Listen to the people who are actually using the EMRs you’re considering.
4. Narrow down the selection: Do your due diligence, and pay attention to what’s most important for your agency.
5. Evaluate cultural fit: Plan for the future by opting for a partnership, not just a contract.
What Defines a Quality EMR?

Choosing a quality EMR solution is largely about understanding your goals and picking the EMR/vendor that best aligns with them.

You must first identify your agency’s unique or specific needs: what features do you require in a new EMR system? Consider your agency’s “wish list” as well: what system features would be beneficial (but not necessarily requisite) for your agency? Look to the future: the right EMR will support growth and change, both in your agency and in the healthcare industry at large.

Make a list of what's important to your agency. Be sure to include the total agency perspective when defining and prioritizing your list: clinical, support, supervisory, operational, technological, and financial.
Nine Features of a Quality EMR Solution

In addition to your own agency-tailored list, there are many features and capabilities that every agency should look for in a quality EMR system and vendor:

1. Interoperability: Can the EMR system transfer information or data to or from other providers?
2. Interface Capabilities: Will the EMR integrate easily with other software solutions at your agency?
3. Regulatory Compliance: Will it help your agency meet all current and upcoming regulatory requirements such as OASIS-E, PDGM (Patient-Driven Groupings Model), EVV (Electronic Visit Verification), HIS (Hospice Item Set), and HOPE (Hospice Outcomes & Patient Evaluation)? Are there automatically updated codes and dashboard notifications regarding new workflows or upcoming milestones?
4. Customization and Operational Compliance: Can the system be customized to your agency's individual requirements? Does it allow customized mandatory field designations?
5. Efficiency and Effectiveness: Can the system help streamline agency processes and procedures? Can it save time for clinicians and/or agency staff? Does the system allow consistency-checking across all fields? Are there viewable charting histories for every field to enable more consistent care?
6. Cost Controls: Does it offer, for example, automated mileage tracking for increased accuracy and proven cost savings?
7. Report Capabilities: Does it allow the data to be easily accessed in reports for episodic, operational and business analysis?
8. System Help: Does it offer embedded help text to aid clinicians in the field?
9. Customer Support: Does the EMR vendor have a proven record of ongoing service and support?

Once you've considered your list and ours, you can come up with a detailed set of decision criteria for your EMR search. You might consider developing a decision matrix that will help you prioritize your list and evaluate the vendors you are considering. You might want to share your list with potential vendors, as well, so they know and can address all of your criteria (it's a good way to ensure you're comparing apples to apples). Don't forget to review and update your list or matrix throughout your EMR search and selection process, as you identify and prioritize new decision criteria.
What’s So Important About Interoperability?

Interoperability is one of the most crucial features of an EMR system. HIMSS (Healthcare Information and Management Systems Society) defines interoperability as the ability of different HIT systems to connect within and across organizational boundaries in order to cooperatively exchange and utilize data. Interoperability relates to the transfer of information or data from one healthcare provider or organization to another.

Home health and hospice agencies must be able to exchange data with other providers—within or outside of their healthcare network. Sharing and processing data from a variety of sources should be automatic and seamless, allowing providers from across the continuum of care to access the most up-to-date health information on their patients. Interoperability is especially important for home health and hospice agencies because LTPAC patients are much more likely to have chronic conditions and comorbidities that necessitate frequent transition between multiple care providers.

An EMR system with limited and/or ineffective interoperability is not an EMR solution, because it does not enable a patient's electronic medical record to become part of their broader EHR. Most EMR systems tout their interoperability capabilities, but in reality, seamless interoperability among EMR vendor systems is rare.
Evaluating the Market: What’s Out There?

You have your list of EMR criteria and/or your decision matrix, and now you’re ready to go. But where do you begin? For most agencies, an obvious first step will be an online search.

Online Research

Online resources can include industry publications and research sites, buying guides and product listing sites.

**Industry Publications and Research Sites:** Online publications can be good sources for industry news and insights. They may also publish vendor press releases and include relevant paid advertising by potentially “good-fit” EMR vendors. The Home Care Technology Report⁴ (Healthcare at Home: The Rowan Report) has been gathering, interpreting and delivering news about home care technology, regulations, marketing, and other issues for more than 10 years. Subscriptions to the weekly e-newsletter are free.

Home Health Line⁵, a publication of DecisionHealth®, and The Remington Report⁶ have each been published for more than 25 years, offering news on healthcare trends and regulations; and business insights, analysis, and planning. Both are available by paid subscription and include digital versions and other online offerings. The Remington Report is also a print publication.

KLAS Research⁷ is specific to healthcare IT. The site offers dozens of provider-driven, provider-centric research reports per year, national research summits and symposiums, and comprehensive information on vendors by category.

**Product/Vendor Searches:** There are several online sources that will match your agency’s needs to EMR vendors. Product/vendor search sites are a good place to start and can help identify some good-fit EMR systems for your consideration. However, you should be aware that the list of products and/or vendors they identify will not be comprehensive. While some sites offer the opportunity for a free category listing to any legitimate vendor, they require the vendors themselves to initiate the listing. Others may limit the listing content for non-paying vendors (i.e., to name only, with no profile or links), or prioritize their search results by vendors who pay for lead generation, which in turn limits the match opportunities for both vendor and provider.
The sites that provide you with a list of qualified EMR software options may do a good job of matching your needs with potential good-fit vendors, but paying vendors may have an edge in getting noticed, and one or more “better-fit” vendors might not be listed at all. KLAS Research is the exception; software vendors are included on the KLAS site when they have been identified by industry providers and/or KLAS researchers as valid players in the relevant healthcare market. Vendors cannot choose whether they appear on the KLAS site, and they do not pay—directly or indirectly—for any listing.

“The sites that provide you with a list of qualified EMR software options may do a good job of matching your needs with potential good-fit vendors, but paying vendors may have an edge in getting noticed.”

Tim Rowan’s Home Care and Hospice Buyer's Guide⁸ is a listing of hospice and home health vendors (including EMR, Home Telehealth, EVV, and medical supplies providers) and the Guide is free to providers. After creating an agency profile and identifying your EMR requirements, the site will generate a list of qualified vendors within your selected home health or hospice category.

Capterra⁹ and Software Advice¹⁰ offer product/vendor searches based on the software criteria specified by vendors in their listing profile. Providers can customize their Capterra software search/match list within a category by product rating, number of users, deployment platform, and relevant features. Software Advice offers a categorized vendor search which can be filtered by specialty, agency size, price point, rating, deployment, and platform.

Consultants: While not an online resource per se, there are several consultant services you can learn about online. Simione Healthcare Consultants (simione.com¹¹), Fazzi Associates (fazzi.com¹²), and the Corridor Group (corridorgroup.com¹³) have been in business for a combined total of over 120 years. Their consultant services can range from operational advice and recruitment to compliance and risk assessment, from marketing and customer service to management and strategic planning.

If your agency is working with a healthcare consultant already, you may find they have valuable insights to offer on health IT solutions. It is important to note, however, that some of the consultant agencies have existing partnerships with specific EMR providers, so be sure to ask for comprehensive, unbiased insights on all potential vendors.
Seven Things to Ask Potential Vendors

Once you have a list of “good-fit” EMR vendors, it’s time to narrow it down a bit. You should start by learning as much as possible about every potential vendor.

Whether you contact the vendors or they contact you, your initial conversations will allow you to rule out some systems right away based on factors such as agency size, available/desired technology, regional availability, etc. For those still in the running, asking the right questions at the outset can save you time and effort. You’ll want to find out how long the company has been in business and what their customer acquisition strategy is. Ask about customers they’ve lost, and why. Remember that company size and/or customer volume don’t equal EMR quality or product longevity; vendors that grow too quickly may take on customers they can’t adequately support, and larger companies may be more likely to phase out products and services.

Here are seven important questions you shouldn’t forget to ask:

1. Do you guarantee that your product will be updated in order to meet any new or evolving regulatory requirements?
2. Does your product allow interoperability with our key partners, including hospitals and other referral sources?
3. How does your product support readmission prevention?
4. Tell us about your implementation and training process; is there additional cost for re-training?
5. What type of support do you provide after implementation? What do your customers have to say about your product support?
6. How does your pricing work? What might we be charged for that isn’t on your price list?
7. How do you rank in the KLAS Research Report?
What Do Other Agencies Have To Say?

You shouldn’t rely solely on the word of an EMR vendor in your search for a quality EMR solution. You’ll want to do additional research on all potential EMR systems and make sure you have thoroughly vetted all potential vendors. Remember to reference and update your decision criteria list or decision matrix frequently.

Your state home health or hospice association may be able to provide information on what systems are being used in your area and direct you to colleagues who are willing to discuss their EMR software systems with you.

Word of Mouth: 10 Things to Ask User Agencies

When talking to other providers it’s important to find out why they are using their EMR system. Find out what they like about it and, just as important, what they don’t like about it. Ask:

1. What are the best and most useful features of your EMR? What do the system users (field and office) think about it?
2. Can it be customized to your agency’s individual requirements? Is customization easy and/or manageable?
3. Does your EMR integrate easily with other software solutions at your agency?
4. How has the system improved agency efficiency? Does it save you time, increase effectiveness, or influence quality charting or reporting?
5. Does it help your agency meet all regulatory requirements such as OASIS-D and HIS?
6. What do you think of the training process? Is it comprehensive and effective?
7. What do you think of your vendor’s customer service and support? Are they responsive to your calls or contacts? Do they address your concerns in a timely manner?
8. Do you consider your EMR a quality solution? Why or why not?
9. What needs are not being met by your EMR system? Is your EMR vendor responsive to your changing needs?
10. How and why did you select your EMR vendor, and did you consider any other vendors before you made your final decision?
Online Research: User Reviews

In addition to talking with other agency providers, you should head back online to find out more about what others have to say.

_Capterra_ and _Software Advice_ share user reviews. Both are subsidiaries of Gartner Inc. and are free for providers. _Capterra_ offers verified reviews on thousands of software vendors in more than 700 categories (everything from accounting to yoga studio management). _Software Advice_ offers reviews of software vendors in more than 550 categories covering a wide range of industries.

The _KLAS Research_ site evaluates vendors by category (about 100) of healthcare IT software. KLAS publishes their user review information in an online performance database and in industry reports. The site offers ratings of EMR software/vendors and anonymous user reviews/comments; it is free to providers, in exchange for their willingness to share their vendor experiences with KLAS.

Which site is the right site?

You’ll find that user reviews differ from site to site, and it’s important to understand the positives and negatives of each online option. _Capterra_ and _Software Advice_ publish both unsolicited reviews and solicited, incentivized reviews.

Both sites advertise a rigorous review validation process. and the assurance that all reviews are verified, unbiased, and independent of vendor membership status.

KLAS user reviews are initiated by KLAS Research based on interest from the provider community. Once they decide a vendor’s performance should be measured, KLAS engages that vendor for a complete list of all live customers. KLAS researchers then reach out to these providers for candid, anonymous feedback and conduct in-depth interviews with these real-life vendor clients.
Why Is KLAS Important?

KLAS Research was founded to improve transparency and performance in health IT and to help provider organizations make educated buying decisions. The site is free to providers in exchange for their willingness to share their vendor experiences with KLAS researchers. When evaluating vendors, KLAS conducts extensive interviews and conversations with clinicians and staff who use the EMR in their daily operations, and publishes the information in an online performance database. Because they are current and comprehensive, KLAS ratings can be considered an accurate, current reflection of a vendor’s product and performance.

“The provider speaks and KLAS simply does its best to amplify that voice. KLAS is committed to providing accurate, honest, and impartial insights to the healthcare industry.”

- KLAS Research

Based on the research data, KLAS also makes an annual “Best in KLAS” or “Category Leader” designation of one vendor within each category (the Category Leader distinction was added for Post-Acute Care/Home Health in 2020 as a new distinction between vendors that predominantly service agencies with an under vs over 200 average daily census). Best in KLAS/Category Leader vendors consistently demonstrate excellence in the industry through outstanding products, reliable interoperability, compliance support, and superior customer service.

Checking Vendor References

There’s not a lot to be said here. Everyone knows how important references can be, but asking for—and checking—vendor references is a crucial step that many overlook or put off. Don’t.

Always ask for—and check!—vendor references.
The Final Contenders: What Is Most Important?

You have your “short list” of vetted, qualified vendors. Now, how do you make the final selection? How do you choose the EMR system and vendor that is best for your agency?

When evaluating the final candidates, you’ll want to review all of the considerations discussed above. If you’re working with a decision matrix, you’ll be able to compare criteria a little easier. It’s important to remember, however, that no system has every bell and whistle, and some bells and whistles you won’t even use once the system is installed. Ultimately, the success or failure of your new EMR system has as much—or more—to do with the ongoing vendor relationship as with the product itself.

“The goal is not to do business with everybody who needs what you have. The goal is to do business with people who believe what you believe.”

- Simon Sinek

Once you know an EMR system can meet your needs, make sure that the vendor can, too...and for the long run. That comes down to education and training, customer service and support, and cultural fit.

Education and Training

One of the keys to a successful EMR implementation is a properly trained, competent, confident user base. So why do some companies invest more in marketing than in their training and support infrastructure? They may be focused more on acquiring new customers than on investing in and supporting those they have. It’s important to be sure that your new EMR vendor values education and training as much as you do.

Does the vendor offer a blend of classroom and online learning, to accommodate the variety of ways that adults learn? What steps do they take to assure that all users are comfortable with the system after implementation? Do they offer in-depth mentor training to ensure resident expertise? What is their approach to onboarding new hires?

At this stage, the vendors’ own websites will be a valuable tool in your EMR selection. Look around the sites yourself, but also make sure each vendor you’re considering shows you what content is available exclusively to their customers.
Look for:

• Online manuals for implementation, ongoing operation, system administration, and system customization
• Ongoing training resources: system training curricula and materials, implementation and training videos, blended learning materials
• Regular online educational resources on industry developments, advancements, and regulations
• Release notes on system updates
• Printable reference forms for clinicians/users: FAQ, system functions and functionality, agency notes, troubleshooting

A superior EMR vendor will provide in-depth training, ongoing educational support, and scheduled “check in” sessions to ensure long-term understanding and success.

Proven Commitment to Service and Support

Perhaps the most important thing to consider when selecting your EMR solution is the vendor’s reputation for customer service. The investment in a new EMR is huge, and you want to be sure the vendor you choose has a service and support philosophy that matches your own.

“Customer service shouldn’t be a department; it should be the entire company.”
- Tony Hsieh, CEO, Zappos

Every software vendor claims to offer great customer service, but the reality is that many vendors fail to deliver it, or stop delivering once the system is live. Pay particular attention to user reviews and references that mention customer support—both good and bad. Because ultimately, the quality of the ongoing service and support your vendor provides can either enable or preclude the success of your EMR system.

The need for customer service and support does not end once the system is in place. A superior EMR vendor gives great care and attention to every customer, from implementation and training, through Go Live, and throughout the life of your EMR relationship. A superior EMR will have a support team that really knows the product, and the industry. Ideally, the team that supports your EMR system should include a range of specialists, from clinicians to IT developers, working together to bring you the best possible service.
Evaluating Cultural Fit

When we talk about “cultural fit” it’s usually from a human resource perspective. That makes sense since we know the positive and negative effects that cultural fit can have on the work environment: hire the “right fit” and you will see higher employee retention and positive business results; hire the “wrong fit” and you could end up in crisis mode, and you’ll definitely be looking for a replacement sooner rather than later. So doesn’t it make sense that the same holds true for vendor partners? Every company and agency has a culture, and your vendor partner will influence yours.

Understanding a vendor’s values and how they align with yours is crucial: in order to reap the greatest benefits from an EMR system, you need to partner with a “right fit” vendor that understands your mission and shares your values. You can begin to evaluate the credibility and cultural character of a vendor beginning with your first communication.

- Do they respond in a reasonable timeframe?
- Are they proactive?
- Do they seem genuinely interested in learning about your agency?

“One way to drive fear out of a relationship is to realize that your partner’s values are the same as yours, that what you care about is exactly what they care about. In my opinion, that drives fear out and makes for a great partnership, whether it’s a corporate partnership or a marriage.”

- Steve Jobs

In-depth discovery meetings are a great way to get a feel for shared values and gauge cultural “chemistry.” As you check the vendor references, pay attention to what you’re hearing from whom. References from agencies that share similar values to yours will be more relevant than those from agencies that are vastly different from yours.
Some questions to ask yourself:

- Is this vendor too big to offer us priority service? Will we get their “A team”?
- Is this vendor nimble enough to deliver industry changes?
- Do they invest heavily in marketing or in infrastructure?
- Do their employees seem happy to work there?

“Your reputation and integrity are everything. Follow through on what you say you’re going to do. Your credibility can only be built over time, and it is built from the history of your words and actions.”

- Maria Razumich-Zec

Taking the time to evaluate cultural fit can mean the difference between success and failure; it can mean the beginning of a long term strategic partnership founded on trust and credibility, or having to start the daunting EMR selection process over again in just a few years.

**What’s Next?**

Finding the right EMR for your agency is not an easy process, whether you are implementing a software system for the first time or replacing an existing system that isn’t meeting your needs.

What you’re really looking for in a vendor is a strategic partner, one that can help and support your agency through changing industry regulations and developing technologies. You want to be comfortable that the vendor you choose will be with you every step of the way...until a return on your EMR investment has been achieved, and beyond.

If you have questions or would like to learn more about the EMR selection process, Thornberry Ltd is happy to help.
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