

# ***The Dos and Don'ts of Selecting an Electronic System for Behavioral Health***

# Content

- **Guiding Principles to Identify Systems** that match organizational needs and services
- **Practical Steps** to identify, scope and grade software vendors
- **Must-Have** vs. **Wish-List** features
- **Best Practices**: What to look for and common mistakes to avoid
- **Tools** you could use during the selection and contracting with software vendors

# Target Audience

- Are you using paper for documentation and/or billing
- Are you using a home-developed system but you need a more robust and/or certified solution
- Are you considering an alternative solution
- Do you have only a case documentation solution or only a billing solution - but not both.



# Basic Concepts

- Electronic Medical Record (EMR) Solution
  - Demographics, Scheduling, Clinical Information, etc ...
- Electronic Billing Solution (EBS)
- Fully Integrated Electronic Health Record (EHR) Solution
  - Scheduling, Intake, Clinical Documentation, Billing, and reporting activities

# *Guidance Principles*



# Guiding Principle # 1: One Size Doesn't Fit all

- Your perfect solution may not be my perfect solution
- Can this vendor product accomplish the key goals of my practice?
  - customize forms/reports
- Can this vendor product integrate with my other systems and adapt to my workflow?
- Not all systems can address all needs



## Guiding Principle # 2: Beyond the "Bells and Whistles"

- Do I really need these features?
- Do I need to pay for vendor product functions I won't be using?
- What is the value added for these "Whistles"?



## Guiding Principle # 3: “It’s a Piece of Cake”

- **Is it easy to use?**

- Create a note
- Create a bill
- Access recorded information
- Create a useful report

- **Is it easy to Look at?**

- Enough white space on screen
- Easy to maneuver
- Easy to find your way around the screens

- **What workflow steps are automated?**

- When you create a note - is the claim automatically batched for submission?



# Guiding Principle # 4: The More the Merrier....

- No participation from team, no commitment from team
- The system must be accepted by members from multiple team
- Member Check-in/Check-out → Front Desk Staff
- Case Documentation → Service Staff
- Claims Processing → Billing Staff
- Reporting → QI and Administrative Staff
- Security → IT Staff
- Affordability → Executive Staff

# Guiding Principle # 5:

## Read the Fine Print before Signing

### Costs

- Start-up costs
- License: Individual/Block
- How often are the licenses renewed?
- Upgrades included or additional upgrade fees?
  - Optional vs Mandated
- Customization costs?

### Features

- Out-of-the-box features?
- Customization to meet your needs?

# Guiding Principle # 6:

## Where Are You When I Need You?

What kind of support will I receive **before**, **during** and **after** implementation?

### Costs for initial training/support?

- Costs vary depending on types of training
  - On-site vs webex
  - material/resources provided

### Costs for on-going support?

- Train the trainer model (super-user) vs ongoing vendor training
- Live-vs. webpage
- Response times after initial request for help
- Unlimited support vs X # customer service calls/month/year



# Guiding Principle # 7:

## On your Mark – Get Set – GO!!!

- **How long after executed contract to begin implementation process?**
  - Vendor backlog vs. resources devoted to you
- **How will training be delivered?**
  - Onsite vs. Remote
- **Older data conversion?**
  - Data entry from day 1 vs. importing old data into new system
- **What is the transition plan?**
  - Paper to electronics (new user)
  - Existing software to new system (rip and replace)

# *Practical Steps*

# Step # 1 :

## What are my Needs?

- What is your historical financial information (3-5 years)?
- What are your annual revenues per service type?
- How many unique individuals do you serve within each service type?
- Prioritize descending by service
  - What are your critical needs?

## Step # 2: Prepare yourself

- Define key functionalities for each key service
- Prepare a demo script to show functionalities
- Use same demo script with all potential vendors to compare systems
- Use same grading system with all potential vendors

## Step 3: Identify the Steering Committee

- Include **respected and knowledgeable** users from different departments
- Use the **same group** to grade all vendors to maintain consistency of criteria
- Train steering committee on the use of the demo script



## Step # 4: Identify Potential Vendors

- RFP/RFI
- [Qualified Adult Behavioral Health HCBS Vendor List](#)

## Step # 5: Coordinate Vendor Demonstrations

- Demos: Try not to schedule individuals more than 90 minutes
  - More information needed - set another session
- Send demo script to vendor in advance and request its execution
  - Ensure vendor comments refer to specific section of demo script
- Give yourself time for internal discussion/grading IMMEDIATELY after demo
- Make a summary of the Pros/Cons for each vendor solution
  - Use summary for comparison with other systems

## Step # 6: Request Quote from Vendors

- Base price/Out-of-the-box cost
- Setup costs
- Training costs
- Customer support
- Costs for customization
- Costs for data conversion
- Maintenance costs
- Licensing Costs
- Contract termination costs

## Step # 7: Check References

- Ask for vendor references: Similar size, type of service, population served, geographic region
- How established is the vendor (years in business; # clients; # clients in NYS; how long they've had clients in NYS, experience billing Managed Care in NYS, longevity of recurring clients)
- Better Business Bureau reports
- Onsite visits to existing customers

## Step # 8: Contract with Vendor

- Ensure costs have been specified and agreed upon within the quote
- Establish if there can be payment plans or if total payments must be paid early on
- Are there other terms and conditions
  - Cost/no-cost for upgrades
  - Cost/no-cost for State Mandated Changes
  - Costs for optional functionalities
  - Cost for customizations and forms

## Step # 9:

# Agreement for Implementation Project Plan

- **Assign key players**
  - Internal liaison to vendor
  - Project manager from vendor
- **Action Plan**
  - What activities
  - Sequence of activities
  - Timeframes for each activity
  - Assigned Responsibility for each activity
- **Vendor point of contact**
  - Escalation process for unmet deliverables

# ***Must-Have vs. Wish-List***

# HCBS Must-Have Features

- ONC Certification 2014 Edition (or later)
- Cloud Based Software
- Staff Mobility
  - Working in the field & need to enter documentation into device?
  - Need to synchronize notes to system back at office.
- Practice Management Components
  - Demographics, Scheduling, Billing, Reporting
- Clinical/Medical
  - Past and present diagnosis; medications; allergies; family, social and personal history
- Behavioral Health
  - Assessments; Individual and Group Progress Notes; Treatment Plan



# Wish-List Features

- Fingerprint scanner
  - For Secure Login - Recommended
- Webcam
  - For Telemedicine – Recommended
- Insurance/Driver ID scanner-card reader
- Electronic Signature Pads
  - How many signatures can the software accommodate?

# ***Best Practices***

# What to Avoid When Choosing Your Solution

- Your organization is not prepared
- You don't know what your budget is
- You don't know what functionalities you need to look for
- You have not vetted the vendor enough
- You have not allowed enough time to compare solutions



# What to Look for in a Solution

- Vendor provides
  - well defined quote
  - Well defined contract
- Vendor is stable
- Vendor provides excellent customer support
- Vendor offers a good price/value ratio
- Vendor product is:
  - Very usable
  - Very easy on the eyes
  - Very functional

# *Available Tools*

# Available Tools

- [Example of Demo Script/Vendor Grading](#)
- Contracting Tips (ONC link)
  - [HealthIT.gov](http://HealthIT.gov)
- Certified Health IT Product List (MU)
  - <https://chpl.healthit.gov/#/search>
- MCTAC/CTAC website
  - <https://www.ctacny.org/>
- BH HCBS Manuals
  - <https://www.omh.ny.gov/omhweb/guidance/hcbs/>

# Questions???

**Eric Weiskopf**

**Health Information Technology/Health Information  
Exchange Senior Manager**

**New York State Office of Mental Health**

**(518) 408-2864**

**[Eric.weiskopf@omh.ny.gov](mailto:Eric.weiskopf@omh.ny.gov)**