



10 STEPS

# TO REPLACE YOUR EHR

Find the right health IT solution for  
your correctional facility



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Whether looking to buy your first EHR, seeking to replace your existing EHR, or consolidating EHRs to a single, integrated solution, this guide will help you in the process. Use these ten steps to help your correctional facility find the best EHR for your billing, reporting, and patient care needs.

## STEP 1

# CREATE AN EHR SELECTION TEAM

Form a team to guide the selection process with representation from every major area of your prison or jail—medical, behavioral, and oral healthcare, technology (IT), administrative, and records. Include no more than seven team members to make consensus building and decision making easier.





## STEP 2

# DO YOUR RESEARCH

1

### Assess what's broken

Ask the team to write down why the current EHR solution isn't working. In addition to stating problems with your current EHR, list pain points, missing capabilities, and preferred capabilities.

2

### Determine what you need

Identify what capabilities the team agrees are most important and choose at least four vendors that may meet your needs.

3

### See solutions for yourself

Watch demos online to preview each of the identified products. During the demos, each person should note the features they like and rank them, considering how they'd help your team.

4

### Finalize your features

Based on your research, finalize your list of key features and functions. The final list will help produce a more solid request for proposal (RFP). It will also help you gauge the overall market.

## STEP 3

# ESTABLISH A BUDGET

To determine a budget for your new EHR system, start by gaining a better understanding of the cost of your current system, as both a yearly cost and total cost of ownership over a set time period—for example, five years. Consider the cost of depreciation on equipment—servers, computers, and peripheral devices. Remember to factor in recurring costs of licensing your EHR software, as well as what you pay for IT support and system maintenance.

When budgeting for the new EHR system, in addition to the costs for software and hardware (or cloud-based hosting, if you select that option), you will need to factor in costs for implementation assistance, training, and data conversions as part of onboarding the new system.



## STEP 4

# DRAFT AN RFP

Draft your requirements for vendor proposals considering how you will score vendor responses. The more information you provide to vendors, the better they can design a solution to meet your needs; and the better their responses, the more accurate their pricing will be, and the easier it will be for your team to evaluate options. Do not share your budget information.

### Ask vendors to explain how their solution will help you

Ask vendors to describe specifically how they will meet each requirement. Inform them that their RFP response will be incorporated into the final contract. Your proposal should require vendors provide at least three client references with a description of the products and services the vendor provided them.

RFP templates are available online. Regardless of which RFP format you choose, the first page should identify a single point of contact with an email address. Tell all vendors they will be disqualified if they communicate with anyone other than that point of contact or by any means other than the provided email.

**Give vendors a few weeks to digest your RFP and submit questions. Aggregate their questions and send the answers to all vendors.**

**Tip —** Require vendors to indicate what would cause any cost changes, and how such changes would be reflected in your contract and invoices. Licensing typically accounts for the largest percentage of cost, so make sure they indicate why and how license costs could change. Also, ask them to explain why and how proposed service hours might change as well as your commitment to purchasing service hours (i.e., Are you locked into the hours proposed?).

## STEP 5

# NARROW THE POOL

Evaluate each proposal with a weighted points scale. There are many ways to score vendors and the amount of granularity you apply is up to you. The important thing is that you employ some method to rank all RFP responses that will allow you to feel comfortable that the top few vendors do in fact offer solutions that meet your needs and are within your budget.

Once all team members have scored each vendor, use the average scores to select the vendors who will move forward. Three is optimal, as the next step requires significant resource commitments. Be sure to notify the vendors who will not be moving forward.

**Tip —** It's not uncommon to find that vendors who meet your needs are outside your budget, and vendors who are within your budget do not meet your needs. If you find yourself in this position, stop and do some additional analysis. Carefully consider your needs and decide whether they can be reduced or if your budget can be increased.



## STEP 6

# SEE THE PRODUCTS IN ACTION

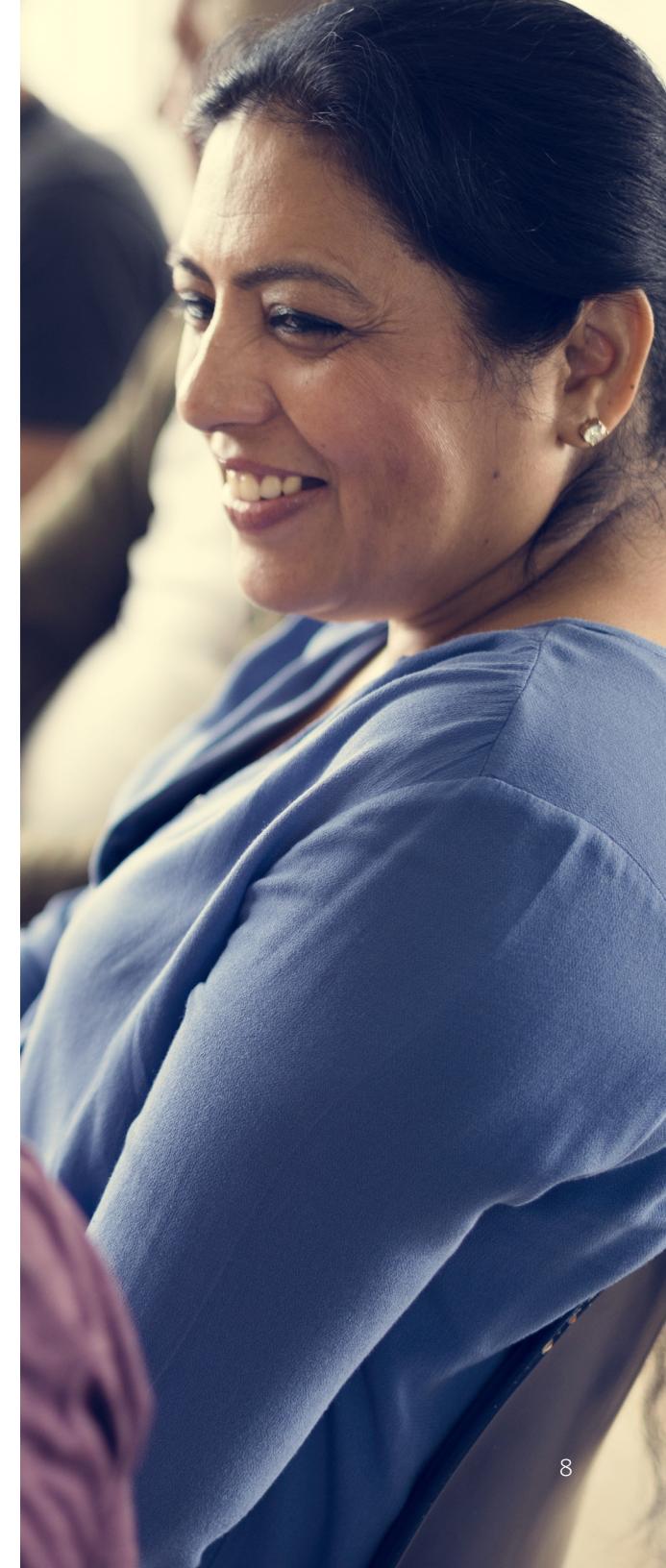
Schedule your top three vendors to conduct on-site or virtual presentations. Give them plenty of time (four-hour minimum) and prepare your team to rank every vendor's demo using the same criteria. Set the expectation with vendors for live demonstrations of their products—not slides or any other type of non-live presentation. Drop vendors who do not have an actual product to demonstrate.

### Break away from workarounds

Some groups like vendors to follow scripts, however this limits vendors who may have creative ways of meeting your needs. It also tends to introduce limitations or workarounds from your current EHR (“this is how we do things”) into your selection of a new EHR. This “carry forward” of current methodologies is one of your biggest risks now and during implementation. Remember, this is your chance to rid your team of workarounds and take a fresh look at all of your operations.

Implementing a new system offers an ideal time to optimize your workflows. Be sure to take advantage of it.

**Tip —** During the live demo, require each vendor to add a new data element to an existing screen and create a new report using data from that screen. This will allow you to judge flexibility and whether your team will be able to make changes or be reliant on the vendor for changes. The latter likely means you'll have to pay for any changes and fit your needs to the vendor's availability.



## STEP 7

# DISCUSS PARTNERSHIP

How you work with a vendor is as important as their product. During the on-site or virtual meeting, ask vendors to discuss the following:

### Partnership Checklist



#### Implementation methodology

What is their project plan? How many hours do they expect the project to take? How is the work divided between the vendor and your group? How quickly does the project begin once a contract is executed?



#### Data migration

Do they migrate data from your system into theirs? How exactly do they accomplish this? How do they price it? What data elements are included? What data do they recommend, if any, that you pay to migrate?



#### Training

Do they provide professional training staff? What are their credentials? Will they come on-site to train, do they provide virtual/remote training, or do you have to go to them? What materials do they provide? How much training does each user get? What system do they use for training? Can they show you a training plan?



#### Proposal review

Ask the vendor to walk you through their proposal line by line and ensure you understand each charge. Confirm any additional costs not listed on the proposal. Have them describe and justify any costs that may change. Require they follow up by providing all of this information in writing within a week of the on-site or virtual meeting.



#### Get to know the vendor

The live demo is your team's chance to learn about the vendor face to face. This is your best opportunity to adequately evaluate the vendor before you make a decision, and your first opportunity to build a relationship. Remember you are seeking a partnership as much as a solution. Live demos are a significant investment for the vendor as well, so they should be willing to provide you with any information you want.

## STEP 8

# REQUEST BEST AND FINAL OFFERS (BAFO)

After reviewing three finalists, your team may already have a clear winner in mind. If so, move to the contracting step. If not, narrow the field to two vendors using a team vote, demonstration rankings, or pricing.

You should now convey any new, removed, or changed needs or expectations to your two prospects. With a better understanding of their pricing methodologies, you can provide additional information that would allow them to refine their quantities for licensing or services.

Ask both remaining prospects to submit a BaFO. This gives them the opportunity to adjust their pricing and gives you a chance to get a better price.

**Tip —** Make sure both vendors are aware that there are only two finalists, and they are competing for your business with this BaFO.



## STEP 9

# CHOOSE A PARTNER

You should now have one vendor who has earned 75% or more of your team's votes. Move forward with your vendor of choice (VoC) until you either sign a contract or reach an impasse. Do not notify your second-place vendor of your decision until you execute a contract with your VoC. Notifying a vendor of their second-place status can cause difficulties should they become your VoC.

**Tip —** Be sure to check the client references the vendor provided. Although client insights can be helpful, they play a minor role in the evaluation of a vendor's capabilities.



## STEP 10

# REVIEW THE CONTRACT AND SIGN IT

Ask your chosen vendor to submit their final contract and software licensing and services agreement (SLSA), as well as all paperwork to finalize the purchase. Inquire about any third-party software that is necessary for the system to operate.

### Get input from legal

Send the paperwork to your legal team and/or outside counsel for a careful review. Make any necessary changes. You are entering into a long-term partnership, so you should understand everything in the contract and be comfortable with all of the conditions. If you hit a critical impasse, let this vendor know you intend to move to your other vendor and begin negotiations with them. Give them time to respond, but if the impasse persists, take action. If you are satisfied, execute the contract.



## Choose a partner you can count on

It's a big undertaking to switch EHR vendors. That's why it's important to choose a vendor who can not only meet all your needs now, but who will be a partner alongside you as those needs evolve.

### Achieve better clinical outcomes with a truly integrated solution

NextGen® Correctional Health Suite is an integrated care solution that provides medical, behavioral/mental, and oral health workflows in a single, easy-to-use solution. With a comprehensive view of patient health and the ability to share information seamlessly—internally and externally—it streamlines workflow, improves clinical outcomes, mitigates areas of risk, and refines reporting while enhancing satisfaction for both clinician and patient.

This robust solution is ideal for prisons, jails, and public health departments, and we continually invest in our solution to meet ongoing industry changes and challenges.



# TAKE THE NEXT STEP.

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Empowering the transformation of  
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