

By following the simple steps summarized below, you will ensure the best outcome in your selection process.

- 1. Identify your selection team**  
Identify a key staff member from each area of your practice to help to conduct the selection process. Your selection team could be very small (2-3 individuals) or larger based on the size of your practice and the number of staff members available to participate.
- 2. Establish your EMR goals**  
Establish your goals for EMR adoption, i.e., the operational and/or financial improvements that your practice hopes to achieve by adopting an EMR system.
- 3. Document your existing workflow**  
First define your practice demographics, such as the number of physicians, nurses, physician extenders and clerical staff in order to facilitate accurate hardware and workflow planning. Next, review your existing workflows and office processes in order to identify the areas you would like to automate with an EMR system.
- 4. Define your system requirements**  
Clarify overall practice objectives and growth and expansion plans in order to develop the general EMR system parameters for functionality and technology against which your selection team will evaluate each vendor system.
- 5. Develop a vendor questionnaire**  
Develop a vendor questionnaire that includes questions about each vendor's company history, financial viability, system costs, system functionality and system technology.
- 6. Develop a candidate vendor list**  
Develop a short list of vendors that your practice wishes to examine further. These candidate vendors will be included in the more detailed vendor questionnaire and system demonstration processes.
- 7. Request system demonstrations**  
Develop customized demonstration scenarios for each system demonstration. Attend the demonstrations to determine how each system deals with each scenario. This is also an opportunity to clarify or ask additional questions of the vendor based on responses to the vendor questionnaire.
- 8. Check vendor references**  
Check references provided by the vendor. Depending on when the vendor questionnaire is returned, this may happen before or after the system demonstrations.
- 9. Conduct a client site visit**  
Visit a client site that is currently using the finalist vendor's system in order to observe the system in a "live" environment.
- 10. Make your final decision**  
Meet to evaluate and summarize the previous steps to determine your vendor of choice.

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