



## PHASE II Vendor Solicitation

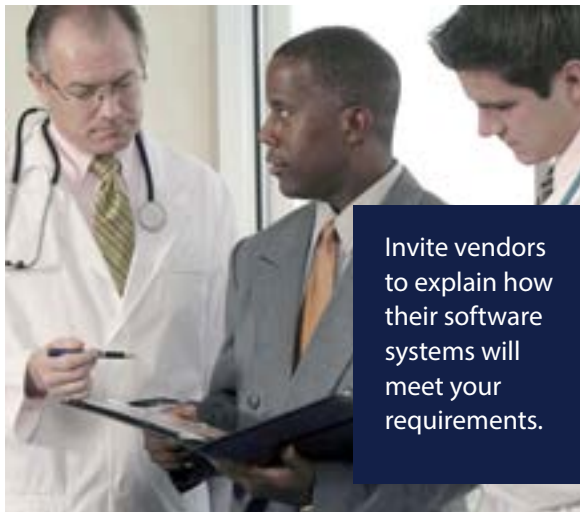
### KEY STEPS

- 1 Write a request for proposal (RFP)
- 2 Identify EHR vendors for solicitation
- 3 Distribute the RFP and collect proposals from vendors

The Vendor Solicitation Process builds on what you learned about your organization during the Pre-solicitation phase. In this phase, you will outline your organization's needs or "requirements" and invite vendors to explain how their software systems will meet your requirements. Most organizations use a request for proposal (RFP) to accomplish this goal. An RFP standardizes the information you receive so that you can objectively compare vendors and determine whether their systems are right for you. An RFP can be very short (e.g., 3 pages) or much longer (e.g., 10+ pages). Longer RFPs are typically used by larger organizations.

While the steps in the Vendor Solicitation process represent the best practices identified by many providers who have procured an EHR, MeHI recognizes that a small, resource-constrained organization may not have the resources to perform all steps. However, it is recommended that every organization should focus on the following components (see Step 1, Part 3) to gather the following information from at least two to three vendors:

- Vendor Profile, which describes their company, product and service offerings, and organizational stability
- Specifications, which cover the basic functions you need in an EHR system (e.g., order entry, documentation)
- Implementation Plan, which includes a basic implementation plan with estimated timeline
- Hardware and Configuration Specifications, which provide a list of hardware requirements and configuration options (client/server, SaaS, etc.)
- Cost Estimate, including detailed costs for each cost item



Invite vendors to explain how their software systems will meet your requirements.



# 1 Write a Request for Proposal

An RFP typically has several parts:

## Part 1 – Introduction and Goals

In this section, you explain your goals and objectives of your EHR acquisition.

## Part 2 – Health Care Organization Background

The second part briefly highlights your organization's background and history, including details such as facility size, staff workforce, services provided, technical infrastructure, and other initiatives that may impact EHR adoption. This section also identifies the specific sector (e.g., BH or LTPAC) requirements that the vendor's product must address and other relevant factors (e.g., privacy and security requirements, EHR system compatibility with major partners and referral sources, regulatory reporting requirements, and other interfaces, such as Mass HIway).

## Part 3 – Vendor Profile and RFP and Required Information

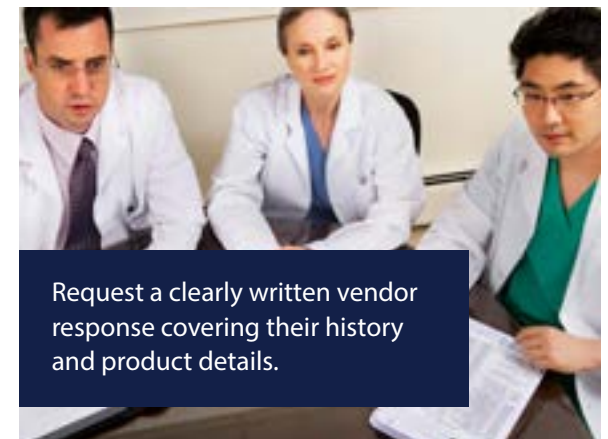
This section provides details on how to respond to the RFP, including due date and mailing address. Request a clearly written

vendor response covering information about their organization history and product details, including specifications required to install, implement and support the EHR system. The request from the vendor should include, at a minimum, the following information:

- Vendor Profile
  - What is the EHR vendor's company background, history, financial information, and pricing of products and services?
- Specifications
  - What features and functions does the system currently provide?
  - How will the system's functions and clinical capabilities provide value to your specialty and patient population?
  - What type of features are available to support patient access and consent management of shared data?
- Implementation Plan
  - Who will oversee the implementation and integration with other systems?
  - What is included in the implementation and what is a typical timeline for an installation for our organization type?

- Hardware and Configuration Specifications
  - What are the technical requirements needed to fully install the system?
- Cost Estimate
  - What are the immediate costs (first year) to install, configure and implement the system and long-term costs (years two through five) for continued use and maintenance of the system?

The more detailed the questions are, the more likely the vendors can provide a complete response for your review. Having a standardized question format allows your organization to objectively evaluate the suitability of EHRs among multiple vendors.





## Write a Request for Proposal

To get started in writing an RFP, leverage what you learned about your organization in Phase I–Pre-solicitation. For example, you learned:

- How you will host the software (e.g., cloud-based versus locally hosted).
- Type of patient information to be collected (e.g., patient demographics, consents, authorizations, and directives).
- EHR functions required (e.g., nursing documentation, clinical decision support, and reports).
- Interfaces required to exchange health information (e.g., with other providers, laboratories, pharmacies, patients, and government disease registries).
- What are staff training needs (e.g., basic computer skills versus EHR software functions).
- Which staff are available to support various aspects of EHR implementation (e.g., project management, software configuration, training and go-live support).

- Evaluate Federal regulations related to the CMS Conditions of Participation (CoPs) and FDA requirements when implementing the EHR, as well as Massachusetts-specific regulations. When soliciting for vendors, you will need to ask if the software system can address these specific requirements. (See Appendix A.)

Follow these steps in developing your RFP:

- 1 Write a clear list of specific vendor and EHR system requirements based on the above factors.
- 2 Be sure to refer to Federal and Massachusetts regulations and other state requirements, some of which may be specific to your setting. (See Appendix A.)

The Request for Proposal Template for Health Information Technology tool is a comprehensive guide to help organizations identify those factors in an EHR that are important to your organization. The intent of this comprehensive guide is to provide a template and starting point for prioritizing the requirements for which you want responses from selected EHR vendors. You may find that you do not need all of the specifications as outlined

(e.g., Meaningful Use), or you may need to add specifications specific to your organization needs (e.g., nursing documentation, integration with MDS software). This RFP template can be modified, including adjusting the template to emphasize a limited set of high priority requirements tailored to your organization.

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Use this tool to develop an RFP for your organization:



[Request for Proposal \(RFP\) Template for Health Information Technology](#)

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For those organizations desiring an abbreviated outline for an RFP template, you can use this tool:



[Abbreviated RFP Template Outline](#)

## 2

# Identify EHR Vendors for Solicitation



After writing the RFP, select your top three to four vendors by developing a screening process. Your short list will meet a set of your minimum criteria, such as:

- Type of software solution (e.g., cloud-based or locally hosted)
- Number of years vendor has been in business and maturity of software product (e.g., recommend looking at software products that have been in the market for 3 or more years)
- Integration with other systems (e.g., administrative and other clinical systems)
- Level of setting specificity (e.g., software developed for a specific setting or generic software for use in any setting)
- Other module offerings (e.g., patient portal system)
- Documentation capture processes
- Preparedness for Federal billing and coding changes

- Health Information Exchange (HIE) capabilities (compatibility with Mass HIway)
- Current relationship with vendor or knowledge of other organizations using this system

Eliminate EHR products that do not fit your requirements and only select vendors that have interoperability capabilities. Interoperable EHRs are preferred because the vendor has developed the system using industry standards for capturing data, creating data reports, sending data messages, and transporting the data to other systems. EHR interoperability allows data transfer among EHR systems between various health care providers (e.g., hospital, physician, BH, and LTPAC). Selecting a vendor that provides a certified Health IT product increases your capability of using an interoperable EHR, which allows your organization to:

- Create interactive functions to help clinicians make better care decisions and delivery quality patient service

- Send patient health information to other health care providers anywhere at anytime
- Integrate with various computing devices to increase mobility of clinician workforce for improved productivity, efficiency, and job satisfaction

Use the Certified Health IT Product List (CHPL) website to find vendors with interoperable products. Use the exact spelling when searching for the product name. If the product is not on the CHPL, it is not a certified EHR. Eliminate this product from the short list or ask the vendor to point you to its location on the CHPL website. Continue the screening process until you have selected three to four recipients.

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Use this tool to find vendors with interoperable products:



[Certified Health IT Product List \(CHPL\)](#)



# 3

## Distribute the RFP and Collect Proposals from Vendors

Invite the identified vendors to respond to the RFP. As a reminder, provide specific instructions about when and where to return the responses. Also, include details about the desired format and length of the response. Having standardized responses will make it easier to compare products side-by-side. Assign one person from the organization to collect the proposals and to coordinate the evaluation team. Once all vendor responses have been collected and organized, you are now ready to move to the next phase of the process.



Standardized responses will make it easier to compare products.