



TOP 10

BEST PRACTICES
FOR CHOOSING A
MANAGED SERVICES
PARTNER FOR EMR SUPPORT



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INTRODUCTION

Considering an external partnership to support your electronic medical records (EMR) system? You are not alone. Many major healthcare networks are determining the best way to meet the challenges introduced to their internal IT staffs in supporting newly installed EMRs.

When considering a Managed Services partnership, it is important to be as deliberate as possible during the early stages of discovery to avoid costly errors, create a smooth transition, and ensure long-term success.

HCTec provides Tier I/Help Desk and Tier II Application Support Managed Services support to both clinicians and patients at many of the largest and most respected healthcare providers in the country.

Use this guide to help ask the right questions, discuss and consider the appropriate issues, and benefit from HCTec's deep healthcare experience in reducing operating costs, improving quality and optimizing labor forces.

1

BE SURE YOUR ORGANIZATION IS READY FOR A MANAGED SERVICES PARTNERSHIP

Soon after implementing new EMRs, many health systems find they're ill-prepared to handle the around-the-clock support and IT requests. The learning curves, complex work and added pressure can impact your team, with your IT staff quickly becoming overwhelmed. That leads to dissatisfaction, turnover, increased expenses, and unhappy end users.

If we have described your situation, then **you are ready to explore a Managed Services partnership** with a third-party operating as an extension of your IT department to provide high-quality and lower cost 24-hour

support. This support can include **general help desk services, clinical and patient portal support, as well as EMR application support and maintenance.** Ideally, your partner can handle the day-to-day operational tasks in order to free up your internal staff to focus on what they do best—optimizing your EMR.

2

DEFINE YOUR REQUIREMENTS

It is important to outline your motivations for entering into this type of agreement so you can define clear requirements for a potential partner. Describe the challenges and issues your hospital is facing that have led you to search for a Managed Services solution. Include specific objectives that your new partner will need to meet to be considered, including as much goals, objectives, and background information as possible.

Consider the services you want to cover:

- Help desk
- Clinical and/or patient portal support
- Application support and maintenance

Outlining desired outcomes in advance will ensure greater success long-term.

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RFI VERSUS RFP—KNOW WHERE TO BEGIN

With your requirements clearly defined, now you can begin to formally seek information from solution providers. First, consider starting with a Request for Information (RFI) over a Request for Proposal (RFP). The RFI process can often add clarity to the scope of work that will be outlined in your RFP and can assist you with narrowing down the list of solutions providers that will meet your qualifications. As you make comparisons between responses, you will better identify key functions that should be required by any candidate who is considered to participate in your RFP exercise. A good place to start in determining your requirements is this **free EMR assessment tool**.

An RFI is also a great way to build relationships with potential partners. It allows you to get to know candidates and evaluate capabilities in advance of sending a formal scope of work.

It is worth mentioning that a broker can provide value when you are preparing an RFP. The right broker has the experience to assist with writing the proposal, as well as the know-how to quantify and rate the responses to identify the best-qualified candidates and make apples-to-apples comparisons.



4

CREATE A CHANGE MANAGEMENT PLAN

This type of relationship will impact all areas of your organization. How do you intend to promote the service to your internal team and what does successful adoption look like? Will your potential partner be able to provide you with best practices for a smooth transition and the adoption of a new way of doing things?

When you partner with an outside company, these individuals will supplement your team and become an extension of your hospital's brand and culture. It is important to determine in advance how well these new team members will interact with your in-house employees.

When reviewing responses, ask yourself:

- How well does the new partner know your hospital, brand and culture?
- Do you enjoy working with this organization and are they a good cultural fit?
- How will a new partner onboard your internal staff?
- How can you best manage sensitivities that can be created by typical outsourcing relationships?
- How does the organization measure change management success?

Your solutions provider should be able to outline a transition plan for your internal staff that answers the questions above and have a proven record of success. Finally, ask for references to ensure that current clients can speak to how well a change management plan has been implemented in the past and how you might learn from any challenges that were overcome.

5

ENSURE YOUR DATA IS SECURELY AND PROFESSIONALLY MANAGED

It is essential to know how any new partner will **securely and professionally handle patient information**. First, define what security requirements are necessary, how the process will be audited and at what frequency. Involve your security team, so your RFP contains all the necessary requirements outlined by your organization.

HIPAA requirements are always a concern when medical records are involved, so security should be as tight in the service center as it is in your hospital. That might not be the case when considering companies with remote employees who telecommute.

Next, identify where work is being done and how your hospital's sensitive information is being managed. **Can you visit a brick and mortar service center to evaluate the process?** Is there a strong operations and management leadership team in place to ensure your customers receive excellent service?

Better understanding how sensitive information will be shared and protected between parties and how your partner will manage service delivery will ensure the utmost care is provided to patients in and out of your hospital.

6

SPECIFY HOW THE SERVICE IS DELIVERED— DOMESTICALLY OR OFF-SHORE

Secure and professionally-managed physical locations can be an important consideration, but you should also contemplate how the service will be delivered. Given the complexity of the work and desire for seamless service and communications, **are the organizations you are considering fully based in the United States** with domestic resources? This is a critical question that can help you avoid potential compliance issues, even internally within your organization. Make sure there are provisions within your contract that detail the type of resources used.

7

UNDERSTAND THE PARTNER ORGANIZATION'S HUMAN CAPITAL MANAGEMENT PROCESS

Choosing the best Managed Services provider is not just about the technical aspects of your agreement and physical location of resources. Evaluating the human resources attributes of your soon-to-be partner are often just as important to the success of any relationship.

Important considerations to include in the statement of work (SOW) are:

- Are employees full-time or consultants?
 - Has the HR department built a strong foundation for Human Capital Management?
 - How does the organization manage worker satisfaction, and can they show proof of their satisfaction rates?
- What is the attrition rate of the workforce?
 - How does the organization measure turnover and manage it so your team members and patients do not experience noticeable service level disruptions?

8

DEFINE STANDARD SERVICE LEVEL AGREEMENTS

During the RFI/RFP process, ask participants to provide their **current service level agreement** to ensure that published goals are aligned with expectations. In addition, you should ask for proof that your potential partners are meeting their SLAs on a frequent basis.

Note that a standard SLA does not typically measure the “happiness” level of the customer. Make certain that you understand how the organization determines and designs performance, as well as the metrics used for measurement. The process should not be subjective.



9

ASSESS THE FINANCIAL STABILITY OF YOUR PARTNER

An important question to answer about any service provider is whether they have the **scale and financial stability** to work with you if specific services outlined in your contract are added or reduced. It is standard practice in this process to ask for balance sheets and audited financial statements. Consult with your HR and finance departments to determine that based on the provided documents, the companies you are considering can grow with you as your needs increase or if a sudden change in service requirements might put a strain on the relationship.



10

ASK POTENTIAL PARTNERS TO PROVIDE ALTERNATIVE CREATIVE SOLUTIONS

Once you have fully outlined the reasoning behind your search for an Managed Services partner, **allow for alternative creative solutions to be offered.** Have each service provider suggest other unique ideas they are implementing within their organization. While these may not directly pertain to your RFP, it may be a benefit to your business in the future and could indicate a high level of innovative thinking.

In addition, each provider should state their overall vision for you based on the facts outlined in your RFP. It is possible that in this process you learn of alternatives that had not been considered previously. These providers are experts at what they do—let them show you their creative thinking and learn from their experiences.

ENTERING THE RFI/RFP PROCESS CAN SEEM LIKE A DAUNTING TASK. HOWEVER, BY FOLLOWING THIS CHECKLIST, YOU WILL RECEIVE BETTER RESPONSES, AND IN TURN, FIND A BETTER MANAGED SERVICES PARTNER!

Let's get started.

HEALTHCARE WORKFORCE SOLUTIONS DELIVERED



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