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## Planning Guidelines for Electronic Medical Records

With the ever-present challenges of providing quality care while containing administrative costs, the potential benefits to be obtained from switching to electronic medical records (EMR) cannot be ignored. EMR make a dramatic impact on the daily routines of ophthalmologists' offices, with more and more practices making the conversion.

### Why an EMR System?

A number of very good reasons exist for you to consider converting to an EMR system.

First, EMR costs are coming down. Experience with the EMR market is no different from the broader economics of information technology: as the hardware and software become more powerful and sophisticated, costs trend downward. In addition, the number of vendors in the marketplace has increased significantly in the last several years.

Although there are certainly short-term costs involved in switching to EMR (cash outlays as well as indirect transitional costs), there is little doubt that the return on your investment will be positive. Think of the time and costs that can be saved in terms of chart pulling, phone contacts with outside parties, and, of course, the avoidance of rejected claims.

As has occurred in hospital and facility settings, outside pressures are mounting for ophthalmologists to reduce medical error rates in outpatient settings; EMR technology helps reduce errors.

While not currently commonplace, it is expected that many health plans, as well as larger self-insured employers will demand that ophthalmologists be able to *readily* document good clinical procedures, and in the process will provide financial incentives for doing so; EMR technology can support and demonstrate the provision of high quality medical care.

The introduction of EMR creates much flexibility for the ophthalmologist and/or staff member. The user has the ability to capture, retrieve, and graph medical or clinical information directly on the computer as opposed to relying on manual transcription.

A key advantage of using EMR is the ease with which office procedures can be performed. Records can be sent via computer to branch offices, surgicenters, and/or hospitals, representing a cost-effective measure for the parties sharing information. Automation of medical records fosters greater accessibility for exchange of information. EMR enable exchanges among insurers, hospitals, nursing homes and lawyers. This capability not only reduces paperwork, but speeds up collection time. Form handling, mail delays, and processing errors are all eliminated. Submitting claims electronically to third-party payors will eliminate the piles of paperwork and can streamline billing procedures.

EMR not only save time and money, but create additional options for the ophthalmologist. Ophthalmologists can retrieve patient information or records at their fingertips while in their office, instead of having staff locate them in the file room. Statistics such as age and gender can be generated about specific procedures (e.g., the number of women 65 and over who had cataracts removed). Also, ophthalmologists are able to view patient notes, such as medical history or medications, while speaking with patients on the phone. These features allow the ophthalmologist to make an informed, accurate decision with a minimal amount of time invested.

## Evaluating an EMR System

Before you make the investment in EMR, you'll need a plan for researching and selecting a system for your practice. Four major factors should guide you in assessing and selecting a system. They are: system capacity; user-friendliness; customer care; and costs.

1. *System Capacity.* Initially, you need to understand the specific functions and features of an EMR system. Although details will vary from system to system, you'll want to learn about the following system tasks:
  - a. Ability to quickly and effectively see the patient's list of medical conditions, as well as medications, test results and supplemental clinical data;
  - b. Ability to document the visit and the clinical decision without delay or inaccuracy;
  - c. Ability to prompt a consideration of clinical issues through alerts/reminders;
  - d. Ability to provide clinical decision support, by linking the ophthalmologist to references and/or databases;
  - e. Ability to quickly and accurately coordinate the patient's prescription refills, including access to drug formularies, drug utilization data and electronic prescription routing;
  - f. Ability to order lab and other tests and diagnostic images;
  - g. Ability to communicate via e-mail to referrers, consulting subspecialty ophthalmologists and patients on a confidential basis; and
  - h. Ability to apply the correct ICD and CPT codes to the specifics of the patient's encounter, and interface with your billing system.

Other key functions to have in the EMR system include privacy and compliance coordination, chronic disease management support and production of patient reports on clinical issues (individualized and on a group basis), not only as to treatment and outcomes but also as to associated costs.

2. *User-Friendliness.* Does the EMR system make it easy for the ophthalmologist and staff to input information? Beyond that, how easy is the system to navigate and will it permit you to customize screens, tasks and activities to accommodate personal preferences? How rigid are the templates of the system in terms of entering the patient's condition (is it pre-formatted or customizable?) Does the system allow you to move from one condition to another without difficulty in situations where a patient has several problems? How easy is it for the ophthalmologist and staff to integrate the EMR system with the practice management systems and claims management systems of your office? Can the ophthalmologist access the EMR system remotely through mobile device interaction (dictation, documentation, capture of charges)?
3. *Customer Care.* Support is an important aspect of any EMR system and will play heavily into your selection. Compare and contrast vendors in terms of installing, training and implementing the system. In addition, see how each vendor compares in response time and accuracy from its help desk. Are software upgrades available at a reasonable cost?
4. *Costs.* The cost (including hardware, software, training and implementation) of an EMR system can range from around \$20,000 to \$50,000. You can easily spend much more depending on what features and capabilities you want. The most important point to understand about EMR costs is that it is very difficult (if not impossible) to compare system prices on an "apples to

apples" basis. Vendors have created systems with great variations in components, configurations and features, so it will be critical to identify the core functions and start your price comparisons from there. Also, you may need to explore options of financing and leasing and be able to compare these terms among vendors, as well as whether a vendor permits modular pricing to allow the practice to install EMR components over time.

## **How to Proceed**

In order to move your office to EMR, start with your ophthalmologists -- make sure that they are committed to switching to a system that will require that they input data on a daily basis. Next, write a description of the desired system capacity, usability features, support elements and cost estimates (this will form the basis of an eventual Request for Proposal). Following your initial phone calls or letters to vendors, set up in-office product demonstrations. Don't let the sales people dictate the demonstration with their rehearsed scenarios; come up with one or more patient situations peculiar to your office and systems and see how the proposed system adjusts in your practice's "real world." As with any major purchase, be sure to obtain at least two client references from each vendor (preferably from ophthalmology practices comparable to yours), and try to visit those ophthalmology offices (with your key staff members) to observe actual operations of the EMR system.

With the commitment of your ophthalmologists and a planned approach, a conversion to EMR will result in both short- and long-term gains for your practice.

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