

Procurement Process: Getting What You Need

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Some Background

1. 25+ years technology acquisition
2. Experience as a purchaser and vendor
3. Negotiated hundreds of contracts
4. Nationally known EHR speaker
5. Helped numerous practices

Take Control and ...

1. Select the right vendor
2. Get the best price
3. Negotiate a favorable contract

Needs Assessment

“If you don’t know what you want,
or don’t communicate what you
want, you reduce your chances of
getting what you want.”

GAUSE

Request for Proposal

1. Vendor company profile
2. Features and functions
3. Implementation and training
4. Support and maintenance
5. Technology
6. Pricing
7. Competitive advantage

Request for Proposal: Vendor Profile

1. Financials (3 years)
2. Customer base
3. References
4. Product maturity
5. Staff size (R&D, sales, support, etc.)
6. Investment in R&D (3 years)
7. User groups
8. Release schedules

RFP: Sample Feature Format

Feature	Available	Not Available	Planned (Date)
Automatic E & M Coding			
E-prescribing			
Report outcomes to CMS Warehouse			
Web Based Patient Portal			
Health Maintenance Alerts			
Automatically Generated Reminders			
Multiple Progress Note Inputs			

Request for Proposal: Technology

1. Are databases standard or proprietary?
2. Is the technology up to date?
3. Is the system scalable and flexible?
4. Is it modular in design?
5. Will it support developing standards?

Get The Best Price

1. Licenses (providers, mid-levels, locums)
2. Interfaces
3. Implementation
4. Training
5. Support

Price Negotiations

1. Testing of new features
2. Referral site for prospects
3. Vendor needs presence
4. Vendor quotas
5. Know the market
6. Be special !!!

Negotiate a Favorable Contract

1. License types and terms
2. Fees and Payments
3. Maintenance and Support
4. Specifications and Documentation
5. Warranties

What is a Software License?

A contract between a licensor (vendor) and a licensee (you) that grants permission to use a specific software product subject to a license contract.

License Types

1. Per Provider
2. Concurrent

License Terms

1. Perpetual
2. Term

Fees and Payments

1. Future costs

1. Licenses
2. Support
3. Customization
4. Training

2. Payment Terms

3. Undisputed Payments

Maintenance and Support

Service Level Agreement

1. Hours of support
2. Methods of support
3. Severity Level Classification
4. Problem Escalation & Triage
5. Response Times
6. Third Party

Maintenance and Support

Upgrades/Updates

1. Time to test and install
2. Take re-training into consideration
3. Support of previous version

Maintenance and Support

Source Code Escrow

1. Vendor insolvency
2. Intellectual property
3. Release events

Specifications and Documentation

1. User guides
2. Request for proposal response
3. Data Schema
3. Implementation plan
4. Training plan

Warranties: Considerations

1. System meets specifications
2. Copyright infringement
3. Intellectual property
4. Software does not contain disabling code
5. Vendor will play nice...

ASP and Hosting Models

1. Service Guarantees
2. Control your data
3. Give yourself an out!!!

Questions???

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