


EMR Vendor: _____

Demonstration Date: _____

<p>Ontario Rheumatology Association EMR Checklist Prepared by Andrew Levstein, IT Consultant May 2011 Questions or suggestions: andrew@levstein.ca</p>	
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All EMRs certified for funding by OntarioMD must meet certain criteria, meaning that all of them will have basic functionality in common (scheduling, billing, electronic lab results, etc.) Each EMR implements these features in its own way, so you should ask for a demonstration that illustrates the full functionality and user-interface of each EMR. The following checklist addresses questions and features that have heightened importance for Rheumatologists, specialist workflow, and issues that are commonly overlooked in standard EMR demonstrations. The ORA also recommends that physicians consult with colleagues regarding their satisfaction with their EMRs, and ask the EMR vendors for references.

Functionality	Description	Answer	Notes
Clickable Homunculus	Ability to click on joints on an image of a homunculus, EMR automatically counts the selected joints	Yes / No	
Disease Assessment Tools & Risk Assessment Calculators	Auto-calculate commonly used assessment tools like DAS-28, CDAI, BASDAI etc.	Yes / No	
Interface to my local Hospital	Ability to receive reports, referrals, test results from local hospital, directly in the EMR (no need to scan paper documents)	Yes / No (If yes, are there fees?)	

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Physician database	Does the EMR include a physician database - ability to search for doctors by speciality and/or geographic region?	Yes / No	
Pharmacy database	Does the EMR include a database of pharmacies (with fax numbes)	Yes / No	
HCV	Health Card Validation – instantly verify if an OHIP card is valid	Yes / No (If yes, are there fees?)	
Direct faxing (Outgoing)	Ability to fax letters, prescriptions directly from the EMR – no need to print and fax	Yes / No (If yes, are there fees? Does this feature require its own analog line?)	
Direct faxing (Incoming)	Ability to receive faxes without having to scan paper faxes	Yes / No (If yes, are there fees? Does this feature require its own analog line?)	
Dragon Integration	Ability to dictate directly into the patient’s chart using Dragon Dictation Software	Yes / No	
Dictation Service (Other than Dragon)	Provides interface for human transcription service and/or provides integrated human transcription service	Yes / No (If yes, are there fees?)	
Patient Education	Includes database of properly vetted patient handouts (e.g. McKesson Clinical Advisor Series)	Yes / No (If yes, are there fees?)	

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Patient Portal	Gives patients web-based access to lab results, health history, online scheduling	Yes / No (If yes, are there fees for the physician? Fees for the patient?)	
Billing Code Bundling	Allows users to create “bundles” of commonly used billing codes	Yes / No	
Billing Codes/Schedule	Allows users to attach billing codes to appt. types	Yes / No	
Batch Billing	Allows users to batch bill from a searched list (e.g. Find all patients on Methotrexate, bill bonus code)	Yes / No	
Custom Forms	Allows user to convert a paper form into an electronic version	Yes / No (If yes, are there fees?)	
Import/Export Templates & Forms	Can users share templates and forms with other users of the same EMR?	Yes / No (If yes, are there fees?)	
Patient Input	Can patients fill out forms on a kiosk or tablet in the waiting room that will go directly into the EMR? (e.g. HAQ)	Yes / No (If yes, are there fees?)	
ASP	EMR is hosted at the OntarioMD data centre, and is accessed over the internet	Yes / No	
Local Server	EMR is hosted on a server in the physician’s office	Yes / No	
Local Server – off-site backup	If hosted on a server in the physician office, does the EMR vendor offer off-site backup?	Yes / No (If yes, are there fees?)	
Hardware compatibility	Can the EMR software be used on PCs and Macs?	PC: Yes / No Mac: Yes / No	

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Hardware compatibility	Can the EMR software be used on mobile devices (tablets, smart phones)	Yes / No	
Tech Support	Standard Tech Support Hours	_____AM to _____PM	
Tech Support – Extended Hours	Does the vendor offer extended support hours?	Yes / No (If yes, are there fees?)	
Fees (Conversion) – Demographics	Convert patient demographics from existing scheduling/billing software	Yes / No (If yes, are there fees?)	
Fees (Conversion) - Scheduling & Billing	Convert historical scheduling and billing data from existing software	Yes / No (If yes, are there fees?)	
Fees (Conversion) - EMR	Convert EMR data from existing EMR software	Yes / No (If yes, are there fees?)	
Fees (Upfront)	Upfront Fees (License and other fees EXCLUDING hardware)	\$ _____	
Fees (Training)	Fees for training users (per hour, per day, how much training time)	\$ _____	
Fees (Training)	Does the vendor offer a discount for group training? (e.g. two solo practitioners training together) Will the vendor offer a discount for ORA members?	Yes / No	

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Fees (Ongoing)	Ongoing monthly fees (licensing and/or maintenance)	\$ _____	
Fees (Additional)	Any other fees (e.g. Drug Interaction database, additional users, enhanced functionality etc.)	\$ _____ \$ _____ \$ _____	
Fees (Protection)	Does the vendor guarantee no fee changes for the duration of the contract?	Yes / No	
Fees (Protection)	Does the vendor guarantee pricing beyond the length of the initial contract?	Yes / No	
User Conference	Does the vendor host an annual user conference?	Yes / No	
Wait-list	Is the EMR capable of managing a wait-list?	Yes / No	