# CHECKLIST: CHOOSING THE RIGHT EHR

Before you begin shopping for an Electronic Health Record (EHR) system, it's important to understand what it is and how it can help your agency.

An EHR is an electronic version of a client's health & medical history maintained by the provider over time. Think of it like an electronic version of a paper chart. Well-designed EHR's also streamline practice management, automate billing, and capture powerful data that can inform treatment and agency decisions.

Electronic Health Record systems essentially digitize your mountains of paperwork, charts, and files, bringing everything into one central hub.

With so many options out there, it can be confusing and time-consuming to research the various EHR solutions. To help you make the right decision for your organization, follow this helpful checklist.
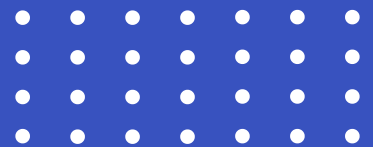
Our industry experts are also available to provide insight to help you make your decision. Reach out- we'd love to learn more about your needs and help you modernize your agency's case management!

Connect with us at Exym.com.

**75% of providers feel their electronic health record software enables them to deliver better patient care.**

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**01** **Identify your top 5 pain points.**

Are you drowning in paperwork? Not able to access your caseload easily? Write down the 5 biggest challenges your organization is facing. Examples: Tough to find files and track client outcomes, information kept in disparate systems, ever-changing compliance laws, accurate billing, or spending too much time on clerical tasks.

**02** **Determine what your EHR should provide to help you work more efficiently and effectively. Make a list, then rank them in priority order.**

This usually includes a telehealth component, ease of use, patient portal, scheduling, billing, data security, and analytics.

- In the past two years this has become more important than ever. A strong telehealth component allows providers to provide care from anywhere while maintaining HIPAA compliance.
- Patient portals are becoming extremely important. A patient portal can allow clients to access records, sign documents, and schedule or cancel appointments.
- Billing, analytics, and scheduling all save time and help your agency run more efficiently.

**03** **Determine who the decision-makers are in your organization.**

If you aren't the decision-maker, determine who you need to work with within your agency to procure and implement an EHR system. It's good to have a dollar amount in mind as you shop for an EHR and know who can provide sign offs and approvals.

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**04** Don't skimp on discussing implementation and training.

Implementation of your new EHR can take a significant amount of time and often there is a separate cost for implementation. Understand which of your team members will need to be involved, and find out how the EHR company organizes their implementation process. Some companies give you a "get started sheet" and others have a one-to-one relationship that manages the product build out from start to finish alongside you. Decide which one you need and which one they offer.
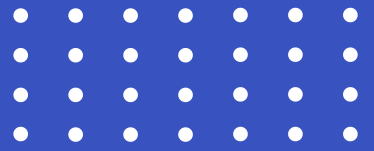
**05** Now you are ready to do your research and schedule a demo!

To find the best EHR system, ask around. Word of mouth is often the best way to find top-notch vendors. There are also review sites like Capterra, Software Advice, and GetApp.

Choose your top 3 EHR systems and book a demo. Ask if their teams have expertise in your industry. Clarify costs, features, and support:

- What are the price tiers and what does each include?
- Are there add-ons?
- Is there a cost per user or per client?
- What is the implementation fee?
- What is the monthly fee?
- What is the time frame of the contract?
- What other applications does your agency use?
- What integrations does the EHR offer?
- Ask about support, trainings, and knowledge hubs and resources and how the EHR vendor will ensure your team is able to leverage its offerings.
- How often is the EHR software updated or new features released?

Take this checklist along and you will be on your way to finding the perfect fit for your agency!

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## About Exym EHR Software

Your agency deserves the best EHR software on the market! If you're looking for robust, intuitive EHR software from a company that really cares, please consider Exym EHR Software.

Exym is a leader in behavioral health EHR software for behavioral health agencies with our intuitive, robust system. 45,000+ clients per month are served by clinicians who use Exym's cloud-based EHR software to simplify their billing, documentation, and case management needs. We'd love the opportunity to demo our software for you!

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