

Appendix G: Resources to Support the Selection of eHealth Solutions

Table G1: Steps in the eHealth Solution Selection Process

STEPS IN THE EHEALTH SOLUTION SELECTION PROCESS	
<p>Identify the Project as a Formal Organizational Priority</p> <ul style="list-style-type: none"> ■ Have the organization executives endorse the project as a priority, define its initial scope, and provide start-up resources. <p>Identify Responsible Groups and Individuals</p> <ul style="list-style-type: none"> ■ Establish the interdisciplinary selection committee, outline the scope of their responsibilities, and provide release time for participating individuals. ■ Establish reporting relationships for the selection committee. <p>Perform Initial Internal and External Data Collection</p> <ul style="list-style-type: none"> ■ Review the mission and goals of the institution and how this project relates to them. ■ Review resources (both internet-based and available literature) on real installations of the new project. Work with a formal project manager (if available) to formulate project steps. ■ Attend trade shows and major conferences related to the project. ■ Obtain related guidelines and regulations. ■ Develop initial system specifications. ■ Develop a list of vendors that offer the planned new system. ■ Review computerized, manual, and/or paper processes and forms in use. ■ Identify information systems that could interface with the project. ■ Identify all current projects that might interface or conflict with the project. ■ Develop lists of institutions and contracts with project experience. <p>Develop Goals, Benefits, and Scope of the Project</p> <ul style="list-style-type: none"> ■ Prepare a statement outlining the goals, benefits, and scope of the project. ■ Develop a feasibility statement and refine system specifications. 	<ul style="list-style-type: none"> ■ Send RFI to potential vendors (optional). ■ Review the responses to the RFI (optional). ■ Create a list of potential vendors for RFP distribution. <p>Develop and Distribute RFP</p> <ul style="list-style-type: none"> ■ Conduct preliminary site visits for specification development. ■ Define and prioritize system requirements as “must have” or “nice-to-have.” ■ Create an RFP, including a standardized response format and weighted evaluation criteria (best value across clinical, technical, vendor, pricing criteria). ■ Develop and include criteria and mechanisms to be used in committee evaluation. ■ Finalize list of potential vendors. ■ Finalize and distribute RFP to potential vendors. <p>Analyze Vendor Proposals and Make Recommendation(s)</p> <ul style="list-style-type: none"> ■ Evaluate responses to RFP across these factors (at least): clinical functionality, technical capability/feasibility, financial aspects, project timeline, and vendor attributes, including projected company stability. ■ Have vendors conduct demonstrations using scenarios devised by the committee. Use formal evaluation criteria to rate them. ■ Conduct site visits and use formal evaluation criteria to rate the vendors. ■ Combine findings and develop decision recommendations. <p>Conduct Contract Negotiations</p> <ul style="list-style-type: none"> ■ Include the RFP as part of the contract, including vendor responses to issues or questions. ■ Review and negotiate the terms of the agreement. ■ Sign the agreement and begin the installation process.

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Table G2: Sections of a Request for Information

SECTIONS OF A REQUEST FOR INFORMATION
<p>Purpose of Request</p> <p>This is a brief statement describing the type of information systems that the institution is planning to select. For example, is the institution searching for an EMR for use in physician offices or a classification and staffing system for use in out-patient clinics?</p>
<p>Background</p> <p>This is a description of the institution, including mission size and number and type of persons treated.</p>
<p>Qualifications</p> <p>This covers any specific qualifications that the institution requires of the vendor. For example, does the vendor need to have been in business for 5 or more years?</p>
<p>Information Requested</p> <p>This section should provide a list of specific elements that should be answered as part of the vendor's response. For example, this might include the following:</p> <ul style="list-style-type: none"> ■ the size, history, and financial status of the company; ■ the basic system architecture and software configuration; and ■ the number of installations it has completed in the past and the names of some of its customers.
<p>Time and Type of Resources</p> <p>This section includes the due date for the response, where the response should be sent, and who the vendor should contact about the RFP if the vendor has any questions. The vendor should be discouraged from contacting anyone else at the institution.</p>

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