

Using the EMR Evaluation Tool

Step-by-Step Instructions for Using the Supplemental Tool for the Report *Electronic Medical Records: A Buyer's Guide for Small Physician Practices*.

Step 1: Download File

If you haven't done so already, download a Zipped version of the EMR Evaluation Tool Excel file from <http://www.chcf.org/topics/view.cfm?itemID=21520>. Click the link at the bottom of the page to start the download, then follow the prompts in the dialog boxes.

Step 2: Open File

If necessary, double-click the Zip icon to see the Excel file, then double-click the file to open it.

Step 3: Macro Enablement

You will then be prompted to Enable or Disable Macros. Please read below and choose the most appropriate option.

“Macros” are specialized functions in this Excel file that allow you to take advantage of advanced features such as being able to add and score new vendors.

Disable Macros. By choosing this option you will be able to use most functions in the tool. However, you will not be able to add or score new vendors.

Enable Macros. By making this selection you will be able to use all tool features.

More Info. You can read more about macros by clicking this button.

Step 4: Tool Overview

The Excel tool you have just opened can be used for three primary functions:

1. Review ratings and scores of select EMR vendors (as scored by Forrester Research) including Allscripts, Amicore, GE Medical, iMedica, Medical Manager, Misys, NextGen, Physician Micro Systems. *See Function 1.*
2. Modify and customize ratings and scores of select EMR vendors. *See Function 2.*
3. Add new vendors and use the tool to rate, score, and compare with select EMR vendors (requires macros to be enabled). *See Function 3.*

Function 1. Review Vendor Ratings and Scores

Click the “Scores and weightings” tab located at the bottom of the Excel file.

Scores and Weightings Worksheet

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
7																			
8																			
9																			
10	CURRENT OFFERING				Forrester's weightings			Custom weightings			Aliscribe	Amicore	GE Medical	Imedica	Medical Manager	Meds	NextGen	Physician Micro Systems	
11	Functionality			50%			50%				3.7	3.3	4.5	3.6	3.5	3.3	3.4	3.2	
12	View			3%			3%				5.0	4.0	5.0	5.0	5.0	5.0	5.0	5.0	
13	Document			10%			10%				3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	
14	Identify			10%			10%				5.0	3.0	5.0	3.0	3.0	3.0	4.0	2.0	
15	Decide			10%			10%				5.0	4.0	5.0	4.0	4.0	3.0	4.0	3.0	
16	Prescribe			10%			10%				4.0	4.0	4.0	3.0	4.0	4.0	4.0	2.0	
17	Order			10%			10%				4.0	2.0	4.0	2.0	4.0	3.0	3.0	3.0	
18	Communicate			2%			2%				2.0	3.0	4.0	2.0	3.0	3.0	4.0	2.0	
19	Code			10%			10%				3.0	4.0	4.0	4.0	3.0	3.0	2.0	2.0	
20	Comply			2%			2%				4.0	5.0	4.0	5.0	5.0	4.0	4.0	4.0	
21	Aggregate			2%			2%				5.0	5.0	5.0	5.0	5.0	5.0	3.0	5.0	
22	Manage			10%			10%				3.0	3.0	5.0	3.0	3.0	4.0	3.0	5.0	
23	Standardize			10%			10%				3.0	3.0	5.0	3.0	3.0	3.0	3.0	3.0	
24	Query			3%			3%				2.0	3.0	5.0	5.0	3.0	3.0	3.0	3.0	
25	Conduct			2%			2%				3.0	3.0	5.0	5.0	3.0	3.0	3.0	5.0	
26	Incorporate			2%			2%				3.0	1.0	5.0	3.0	4.0	3.0	5.0	2.0	
27	Usability			30%			30%				4.2	4.6	4.6	4.2	4.6	4.0	4.8	3.8	
28	Input			20%			20%				3.0	5.0	4.0	5.0	4.0	4.0	5.0	3.0	
29	Customize			20%			20%				5.0	5.0	3.0	5.0	5.0	5.0	5.0	5.0	
44	STRATEGY										4.3	3.7	4.3	4.3	3.7	3.0	3.0	3.0	
45	Executive vision			34%			34%				5.0	3.0	5.0	5.0	5.0	3.0	3.0	3.0	
46	Product road map			33%			33%				3.0	3.0	5.0	5.0	3.0	3.0	3.0	3.0	
47	Other strategic factors			33%			33%				5.0	5.0	3.0	3.0	3.0	3.0	3.0	3.0	
49	MARKET PRESENCE										4.3	3.0	4.4	2.1	5.0	4.6	4.1	3.0	
50	Installed base			25%			25%				5.0	2.0	5.0	2.0	5.0	5.0	5.0	5.0	
51	Physician users			100%			100%				5.0	2.0	5.0	2.0	5.0	5.0	5.0	5.0	
52	Revenues			25%			25%				4.0	3.0	4.0	3.0	5.0	5.0	5.0	3.0	
53	2002 revenues			100%			100%				4.0	3.0	4.0	3.0	5.0	5.0	5.0	3.0	
54	Number of employees			10%			10%				4.0	3.0	5.0	2.0	5.0	5.0	4.0	2.0	
55	Size of sales force			20%			20%				4.0	2.0	5.0	1.0	5.0	5.0	3.0	2.0	
56	Strategic partners			20%			20%				4.0	5.0	3.0	2.0	5.0	3.0	3.0	2.0	

Overall Score. Overall product rating scores can be found in the row titled “CURRENT OFFERING” under the respective vendor name in bold. A score of 5.0 is the highest possible score and a score of 1.0 is the lowest. This score represents the weighted averages for “Functionality,” “Usability,” “Support,” and “Cost.”


Strategy and Market Presence Scores. These scores are used to help understand the business stability of the vendor and provide the basis for the Forrester Wave graphic (see Custom Forrester Wave tab).

TIP: To better understand ratings and scores, it is recommended you click on the “Criteria” tab at the bottom of the Excel file and print the list of attributes and rating scales. This will serve as a helpful reference when using the tool.

Function 2. Modify and Customize Vendor Ratings and Scores

Step 1: Select an EMR vendor by clicking the “scroll right” arrow at the bottom left location of the Excel file and scroll to the tab with the name of the vendor you would like to examine.

Vendor Data Modification

	A	B	C	D	E	F	G	H
7	Medical Manager's Interqy							
8	Evaluation criteria CURRENT OFFERINGS			Attribute explanation	Scale explanation		Weighting	Score
9	Functionality			How quickly and effectively can the doctor?	Judging from product information and demos, vendor and user interviews, and third-party evaluations:		50%	3.5
10	View			View the patient's problem list, meds list, test results, and other information critical to the clinical purposes of the visit?	In terms of giving the doctor quick and effective access to the patient's problem list, meds list, test results, and other critical information, the system provides: 5 = One-click access to all major views 3 = One-click access to most major views 1 = Inconsistent access to major views		5%	5
11	Document			Document the visit and the clinical decision-making process?	In terms of enabling the doctor to document the visit and the decision-making process quickly and effectively, the product is: 5 = uniformly quick and effective 3 = Reasonably quick and effective 1 = Marred by notable limitations		10%	3
12	Identify			Identify clinical issues by means of alerts and reminders?	5 = Advances alerts and reminders are built into the system and more advanced functionality can be configured by the user or obtained within interfaces and standalone modules available at additional cost. 4 = Limited alerts and reminders are built into the system, but advanced functionality can be configured by the user or obtained within interfaces and modules available at additional cost. 3 = Limited alerts and reminders are built into the system, and additional limited functionality can be configured by the user or obtained within interfaces and modules available at additional cost. 2 = No alerts or reminders are built into the system. All must be configured by the user or obtained as part of interfaces or modules available at additional cost. 1 = Alert and reminder functionality, even by means of configuration or standalone module, is minimal to nonexistent.		10%	3
	 Allscripts / Amicore / GE Medical / iMedica / Medical Manager /							

Step 2: Select the vendor tab. (For this example, we chose Medical Manager.)

Step 3: Modify the scores of the product features starting in cell H11 and working your way down column H.

Step 4: If you wish to modify the weighting of different features, click on the “Scores and weightings” tab at the bottom of the Excel file.

Custom Weightings Modification

8													
9	CURRENT OFFERING	Forrester's weightings			Custom weightings	Allscripts	Amicore	GE Medical	iMedical	Medical Manager	Mysis	NextGen	Physician Micro Systems
10	Functionality	50%		50%									
11	View	3%		3%		3.7	3.3	4.5	3.6	3.5	3.3	3.4	
12	Document	10%		10%		5.0	4.0	5.0	5.0	5.0	3.0	5.0	
13	Identify	10%		10%		3.0	3.0	3.0	3.0	3.0	3.0	3.0	
14	Decide	10%		10%		5.0	4.0	5.0	4.0	4.0	3.0	4.0	
15	Prescribe	10%		10%		4.0	4.0	4.0	3.0	4.0	4.0	2.0	
16	Order	10%		10%		4.0	2.0	4.0	2.0	4.0	3.0	3.0	
17	Communicate	2%		2%		2.0	3.0	4.0	2.0	3.0	3.0	4.0	
18	Code	10%		10%		3.0	4.0	4.0	4.0	3.0	3.0	3.0	
19	Comply	2%		2%		4.0	5.0	4.0	5.0	5.0	4.0	4.0	
20	Aggregate	2%		2%		5.0	5.0	5.0	5.0	5.0	5.0	5.0	
21	Manage	10%		10%		3.0	3.0	3.0	3.0	3.0	4.0	3.0	
22	Standardize	10%		10%		3.0	3.0	5.0	3.0	3.0	3.0	5.0	
23	Query	3%		3%		2.0	3.0	5.0	5.0	3.0	3.0	3.0	
24	Conduct	2%		2%		3.0	3.0	5.0	5.0	3.0	3.0	5.0	
25	Incorporate	2%		2%		3.0	1.0	5.0	3.0	4.0	3.0	5.0	
26	Usability	30%		30%		4.2	4.6	4.6	4.2	4.6	4.0	4.5	
27	Input	20%		20%		3.0	5.0	4.0	5.0	4.0	4.0	5.0	
28	Customize	20%		20%		5.0	5.0	3.0	5.0	5.0	5.0	5.0	

Under the “Custom weightings” column, modify the weights of each feature, making sure that each section still adds up to 100 percent.

Step 5: Final adjusted scores can be seen at the “Scores and weightings” tab. *For detailed instructions on how to read the vendor scores, go to Function 1.*

Function 3. Add Vendors / Use Rate, Score and Comparison Tools

Step 1: To activate this feature, you must have macros enabled. If you are unsure, close and re-open the file.

Step 2: Click the “Scores and weightings” tab at the bottom of the Excel file.

Step 3: Click the “Add vendor” button and enter the name of the product and vendor as prompted.

Add Vendor

8	Forrester's weightings			Custom weightings	Allscripts	Amicore	GE Medical	iMedica	Medical Manager	Misys	NextGen	Physician Micro Systems
9	CURRENT OFFERING	L1	L2	L3								
10	Functionality	50%		50%	3.7	3.3	4.5	3.6	3.5	3.3	3.4	3.2
11	View		3%		3%	5.0	4.0	5.0	5.0	5.0	5.0	5.0
12	Document		10%		10%	3.0	3.0	3.0	3.0	3.0	3.0	3.0

Step 4: Click the “scroll right” arrow at the bottom left location of the Excel file, scroll to the tab with the new vendor name, and click on the tab.

Step 5: Enter in the scores of the product features starting in cell H11 and work your way down column H.

Enter Custom Weightings

8	Forrester's weightings			Custom weightings	Allsc	Amic	GE I	iMed	Med	Misys	Next	Phys
9	CURRENT OFFERING	L1	L2	L3								
10	Functionality	50%		50%	3.7	3.3	4.5	3.6	3.5	3.3	3.4	3.2
11	View		3%		3%	5.0	4.0	5.0	5.0	5.0	5.0	5.0
12	Document		10%		10%	3.0	3.0	3.0	3.0	3.0	3.0	3.0
13	Identify		10%		10%	5.0	3.0	5.0	3.0	3.0	4.0	2.0
14	Decide		10%		10%	5.0	4.0	5.0	4.0	4.0	4.0	3.0
15	Prescribe		10%		10%	4.0	4.0	4.0	3.0	4.0	4.0	2.0
16	Order		10%		10%	4.0	2.0	4.0	2.0	4.0	3.0	3.0

Scoring criteria are listed for your reference in column F.

Step 6: If you wish to modify the weighting of different features, click on the “Scores and weightings” tab at the bottom of the Excel file. *See Function 2 for details.*