***Requirements***

*The new EHR software must:*

1. Integrate scheduling, billing and documentation of care provided with notes that are accessible by providers and patients (Pass Down Log).
2. Have support and training available.
3. Allow for coding.
4. Supports customizability and pre-sets/preferences.
5. Incorporate reminders and notifications.
6. Be multiplatform friendly.
7. Have accessibility options (Font size, text to speech, multilingual, colors etc.).
8. Have multi-tasking/multi-tab capabilities.
9. Be able to easily stay up to date (ICD-10, SNOMED-CT and any changes).
10. Be able to group family records/ patients together under a singular account.
11. Be able to transfer easily and securely all patient data from system to system, facility to facility, provider to patient and patient to provider via fax, email etc.
12. Be able to create and manage at least 150 accounts.
13. Be cloud-based.
14. Provide a team and or software for system transfer.
15. Be reasonably Priced.

*Possible Vendors*

1. ***AdvancedMD:***

*Phone: Steve Hauk- 801-988-7201.*

*Email: steve.hauck@advancedmd.com*

* 2-month implementation with a team
* Conduct training with each department.
* Training on every page by pressing F1
* Family accounts
* Required training that’s up to date.
* Assigned representative.
* Scale with the organization
* Monday-Saturday support- 8am-8pm
* #1 Billing System
* Create forms by ourselves!
* Reminders for patients and providers- No fee
* Don’t need to go to a separate insurance portal.
* Reminders and such in another language, but the EHR isn’t in Spanish.
* Can have family account.
* Open API- Can receive and send data easily. Free billing
* 1 year contract then month to month
* Based on number of providers OR encounters per month.
* Discounts based off encounters.
* Bulk rates available!
* Free Demo
* Put deal into writing.
* 1,000 encounters per month, the pricing would be roughly **$2,000-$2,250/month (for all 36 providers)- Depends on if Telehealth is desired or not.**
* **$0 setup fees** (we’ll waive over $8k in one-time setups)
* **No monthly payments for the first 3 months** (to help you go through implementation and training successfully without having to make double payments.
* Integrated solution = yes 100% on the cloud; multiple platforms from apple devices to PC’s; iphones; ipad; etc.
* Support/train = yes 6-12 weeks of implementation team for onboarding; we set up all EDI agreements; train all staff/users/providers
* Coding = yes integrated with notes
* Reminders = yes voice/email/text
* Multi-tasking = yes
* Family records on single account = yes
* Transfer data/records = yes with PM we’ll do it for free; with EHR we have a free bulk uploader tool (transfer 50 notes at a time), or you can pay a 3rd party to do it (typically $5k one-time fee)
* Translate EHR to other languages = no

1. ***Kareo:***

*Phone: Mathew- 949-303-8312*

*Email: matthew.danto@kareo.com*

* Unlimited number of forms.
* Customer service reps are certified in various areas.
* Lots of free customizability.
* Unlimited text and phone reminders that are customizable.
* Have an app and can be used on multiple platforms.
* Can create accounts in house!
* Dictation options/Talking to the computer and can make forms in another language and changing sizes.
* Updates every month with no charge.
* Cannot make family accounts. Every child must be under a different account. -in progress
* Transition Team is remote with assistance, or we can do it all alone - 8-14 days
* Unlimited users.
* Unlimited Therapist claims - $224 per month per therapist
* Low volume-50 claims per provider- $174 per month per provider
* When you sign up with Kareo, I will assign you a success coach that will be specifically yours for 90 days. They will help you get your account set up, and make sure you have all your training. **All at no additional cost.**
* Unlimited, and ongoing training for the life of your account **at no additional cost.**
* Unlimited, and ongoing technical support, with live technicians and a **wait time average of 3 minutes or less**, for the life of your account**at no additional cost.**
* **No onboarding or start-up fees.**
* Unlimited users—only charge is per rendering provider.
* [Kareo Compliance/Security](https://nam04.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.kareo.com%2Fsecurity&data=05%7C01%7Cskylar.carman%40encompassnw.org%7C13f511fe9f6448fbd36908db660f5c82%7C15c4774c66cc48cd91c0d148df17906c%7C0%7C0%7C638215988845833665%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=ooaSX2tL2pQy91sJOb6y6nx5ppPsYwUrSq%2B89zHSrRo%3D&reserved=0)
* [Kareo Mobile](https://nam04.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.kareo.com%2Fmobile&data=05%7C01%7Cskylar.carman%40encompassnw.org%7C13f511fe9f6448fbd36908db660f5c82%7C15c4774c66cc48cd91c0d148df17906c%7C0%7C0%7C638215988845833665%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=zi2f4MoE29cN1XrDdabBGqHFJWZ48qKwS7FEoLs2iYw%3D&reserved=0)
* [Data Services: Import](https://nam04.safelinks.protection.outlook.com/?url=https%3A%2F%2Fhelpme.kareo.com%2FData_Services%2FData_Services%253A_Import&data=05%7C01%7Cskylar.carman%40encompassnw.org%7C13f511fe9f6448fbd36908db660f5c82%7C15c4774c66cc48cd91c0d148df17906c%7C0%7C0%7C638215988845833665%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=rl%2FkUd3DkjyzWB1%2F%2BLy%2BamcW%2FQzZV3aU%2B675SoTZCDo%3D&reserved=0)
* [Kareo Add-In for Excel](https://nam04.safelinks.protection.outlook.com/?url=https%3A%2F%2Fhelpme.kareo.com%2F01_Kareo_PM%2F11_Run_Reports_and_Analytics%2F10_Custom_Reports%2FMicrosoft_Excel_Add-In_Instructions&data=05%7C01%7Cskylar.carman%40encompassnw.org%7C13f511fe9f6448fbd36908db660f5c82%7C15c4774c66cc48cd91c0d148df17906c%7C0%7C0%7C638215988845833665%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=ifGbMa78Rx8nhWcBtoCTqilolOtOxT4MoY8OQBcrIwg%3D&reserved=0) (customized financial reporting in addition to ample standard reports that are included)
* **Willing to negotiate pricing.**

1. ***Therapy notes***

*Phone: 215-658-4550 EX: 244*

* Customizable portal
* Cookie cutter format- (One format that fits all)
* Can’t customize forms- Can remove but not add items.
* Has reminders for the team and patients.
* Texts and call reminders are $.14 each. Emails are free.
* No app but can be accessed on all platforms.
* Speech to text, works with dragon and text to speech.
* Multiple tabs can be utilized at once.
* Would need to update CPT codes separately.
* Monthly updates for ICD-10.
* Can’t bill secondary insurance providers.
* Clinicians- $25 a month, 14 Cents a claim.

1. Fusion EMR

Phone: Sue- 877-912-5197

* All in one for billing, scheduling, and patient management
* Must seek patient insurance info on another site.
* Training and search topics with links via the help button.
* Allows for coding.
* Continuously update with new features
* Customer service- 8am- 8pm eastern
* No app- Web based.
* Customizable intake forms
* Customizable views
* Patient portal- choose what to share but can’t edit much.
* Text and email reminders- set format.
* Notifications/alerts for therapists.
* Patient portal multi-platform friendly
* Talk to text.
* Not multilingual
* Multitasking friendly
* ICD-10 constantly updated.
* Family accounts with links to each child
* In-person or virtual implementation team with 1 year contract.
* 8-10 weeks of biweekly meetings
* Fusion doesn’t communicate with other EHRs.
* Can add own users and decide on privileges.
* Payment:
* $49 per Staff members
* Implementation- $1500 or more.
* Text reminders- 10 cents per reminder
* Claims- 30 cents per claim.
* Credit cards fees- 3.29%
* Credit card transaction fee- 30 cents
* Unlimited uploads
* Annual CPT code cost- $18 per provider

NextGen

-No Response

Epic

-No Response

Oracle: Cerner

-No Response