



# Evaluation Tools

Your clinic will need to establish an evaluation and decision-making approach for choosing your electronic medical record (EMR). This can be accomplished using various approaches from unstructured discussions to more rigorous scorecards. In advance of the EMR demonstrations, you should decide on your approach and complete the appropriate preparations.

## Deliberations

Deliberation is a process of thoughtfully weighing options. This approach is useful for smaller groups who consider themselves in general agreement on the final outcome. Planning for a deliberation involves the group meeting beforehand to review, discuss and come to an agreement on specific requirements for the clinic. Have the selection committee meet as soon as possible after the demonstration and discuss the advantages and disadvantages of the EMR options presented. This step results in the committee having an overall impression of the EMR. Once all demonstrations are completed, the selection committee reviews the results of each deliberation and makes a decision.

## Requirements Checklist

A requirements checklist is a more structured approach that assists in covering important requirements during and after the demonstration. This approach is useful if the clinic has a varied and diverse list of requirements. The checklist can be used to identify which requirements are the most important in making a decision for the clinic. Once the checklist is prepared, review it briefly with the selection committee before the demonstration. Use one checklist for each demonstration. One person can complete the checklist as soon as possible after the demonstration. It is not recommended to complete the checklist during the demonstration, as full attention should be given to the EMR. Once the checklist is completed, the selection committee reviews it for everyone's agreement. Once all demonstrations are completed, compare the checklists to determine the EMR best suited for your clinic. Use the results in the selection committee's final deliberations.

## Evaluation Scorecard

A scorecard is the most rigorous approach to evaluating demonstrations. This is useful for large multidisciplinary clinics where a selection committee only represents a portion of the staff. It assists in ensuring everyone's requirements are considered and weighed accordingly.

Once the scorecard is prepared, review it with the selection committee before the demonstration. Each person should complete the scorecard as soon as possible after the demonstration. It is not recommended to complete the scorecard during the demonstration, as full attention should be given to the EMR. Once the scorecards are completed, compile the results for the group. The selection committee reviews the results for everyone's agreement. Once all demonstrations are completed, compare the results to determine the EMR best suited for your clinic. Use the results in the selection committee's final deliberations.