

---

---

# Bridging the Gap: Managing a Smoother Vendor Integration

---

---

---

---

---

Nuesoft™

---

---

# Table of Contents

## Managing a Smoother Vendor Integration

---

<b>Evaluate the experience of your vendors</b> .....	1
<b>Adopt a project management approach</b> .....	2
Define roles and responsibilities	
Hold a kick-off meeting	
Incorporate regular, ongoing communication	
Plan for future product changes	

## Bridging the Gap: Managing a Smoother Vendor Integration

It's a reality of running a medical practice: chances are you will not find a perfect [electronic medical records \(EMR\)](#) provider that also offers a robust [practice management](#) product at an affordable price. And vice versa. To thoroughly address both the clinical and administrative requirements of your practice, you might decide on an integration – a bridge that links products from two different vendors using an industry standard coding language.

To help improve the odds that your integration goes off without a hitch and is up and running in no time, you'll want to: 1) choose vendors with integration experience, and 2) incorporate a project management approach.

### Evaluate the Experience of Your Vendors

Maybe you are selecting a new EMR or practice management vendor to complement an existing automated solution, or perhaps you are already working with two vendors and have decided it is time to integrate to streamline your workflow. Whichever the case, it is in your best interest to assess up front the integration experience of both vendors. The more experienced the vendor, the less headaches for your practice. Here are some questions that you can ask both your EMR and practice management vendors to quickly size up their integration savvy:

- **Are both vendors compliant with Health Level 7 (HL7) standards?** HL7, Inc. is a standards organization that is accredited by the American National Standards Institute (ANSI). Most practice management or EMR vendors adhere to HL7 specifications for clinical and administrative data. In addition to being compliant, you want both vendors to be HL7 version compatible. This helps to ensure that demographic messages or billing information can be exchanged across platforms.
- **How many other practices enjoy a successful integration with their company?** In general, the more the better.
- **How many industry partners do your EMR and practice management vendors share integrations with?** A higher number of integrations imply that the vendor probably has worked out kinks in their integration process. Also, the more partners involved, the more types of HL-7 messages that the vendor is equipped to accommodate.
- **Does the vendor have a staff person dedicated to integrations? If so, is she/he full time?** You're more likely to see results if you have access to someone 40 hours a week, instead of the part-time IT person who also wears 10 other hats.
- **How many other integration projects are already in the hopper?** As with anything, results often come down to resources. You do not want to get in a tug of war with another practice that shares your sense of urgency for having its integration completed.
- **What is the average timeline for completion?** Anyone who is familiar with the world of health information technology knows that product development is a detailed, deliberate process. Once you know your EMR and practice management company's integration schedule, you need to decide whether it is realistic for you.
- **Do both vendors come recommended from other interface customers?** Don't take the vendor's word for it. Be sure to get client references and call to verify an integration success record.

## Adopt a Project Management Approach

When you are satisfied that both your [EMR](#) vendor and [your practice management](#) vendor have the experience to carry out your integration, you are ready to move forward. To ensure that your vendor partners don't put your integration on the back burner until the next ice age, insist on a structured, results-oriented approach to getting it done. It's time to dust off your old project management hat. Project management – a process that includes organizing and managing resources so that a task is completed within defined scope, quality, time and cost constraints – should include the following elements in a vendor integration:

### **Define roles and responsibilities.**

Here is where all of the homework that you did to assess the level of experience of your vendors pays off. Choose the vendor in which you have the most confidence to be the team lead for the integration. That person will drive the process. Also, designate someone from your practice to be the client contact. Ideally, this would be you. If that is not an option, it should at least be someone who can respond in a timely manner to your vendor partners, and who has enough basic technical knowledge to be a resource to them.

### **Hold A Kick-Off Meeting**

Once you've chosen the starring cast and exchanged the all important technical specifications, it's critical that you get everyone involved in the integration together to obtain their buy-in and commitment. If the vendor that is the project lead does not step forward to schedule this meeting, you should take the initiative.

During the kick-off meeting, you should:

- identify project objectives and expectations,
- review best practice workflows,
- collect e-mail addresses, names, titles and information from all participants to develop a content roster,
- identify pitfalls to avoid, and
- agree about and commit to roles, accountabilities and timelines.

### **Incorporate Regular, Ongoing Communication.**

After everyone understands their roles and responsibilities, and you are all moving forward with an agreed upon action plan, include check points along the way to assess progress and proactively ward off any roadblocks. This might be a weekly (or monthly) conference call with all of the key players, or, an e-mail that is initiated by the project lead that updates everyone else about the status of important milestones.

### **Plan for Future Product Changes**

Finally, after all the testing is complete and you are satisfied that everything is working properly, don't walk away until there is a procedure in place to address any future product upgrades that might impact the integration. At a minimum, you should secure written confirmation from vendors that they will provide proactive notification if a planned product release will mandate retesting.

Integrations don't have to be an arduous experience, but your proactive involvement is essential for getting it done faster. Ask the key questions up front, set realistic expectations, and apply a project management approach that fosters accountability and good communication. And remember, attitude is altitude. Make sure your team players see integrations as a necessary and positive business partnership, not a necessary evil.

*About the author: Shahram Famorzadeh, PhD, is the Chief Technology Officer at Nuesoft Technologies, where he heads the company's Certified Integration Program and has successfully led nearly 50 integrations in two years.*