



# PROPOSAL KIT SAMPLE

## Electronic Medical Record System Sample Proposal

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All Staff  
Blackbird Medical Group  
Honolulu, HI 96805

Dear Staff Members,

As we decided in our last staff meeting, I have prepared a plan for converting our current patient record system to an electronic medical record (EMR) system.

After comparing available software and local vendors, I have selected the Wyler Electronic Medical Records System as the most practical for us to adopt. For simplicity's sake, I will call this 'the EMR system' throughout this proposal.

Please take the time to read and consider this proposal carefully, note any concerns or questions you may have, and come prepared to discuss it at our next staff meeting on July 15. At the end of that meeting, we will take a final vote on implementing this EMR system.

Sincerely,

Nancy Kobayashi  
Director  
Blackbird Medical Group  
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[www.BlackbirdMG.org](http://www.BlackbirdMG.org)



# PROJECT

## Electronic Medical Record System Upgrade

Prepared for: Blackbird Medical Group

Prepared by: Nancy Kobayashi  
Director





# CHALLENGES

We recognize that we will face certain challenges during the course of this conversion project.

## Phase I

During Phase I, we will be sharing our offices with temporary staff who will be scanning and converting our files. Most of this work will take place after office hours, but there will be two to four temporary employees with us during the day.

Also during Phase I, we will have additional equipment in our front office and billing office—new PCs, scanners, etc., which will be used primarily by the temporary staff. So we may feel squeezed for space during this time period.

If necessary, we will temporarily give up our break room to create more office space for the temporary personnel. In this event, personnel may take their breaks in the coffee shop next door but must wear their pagers so they can be called if needed.

## Phase II

During Phase II, we will all be training in the use of our new EMR system after hours but will probably have a mix of records and procedures in place during our regular work days. We must exercise patience and diligence to ensure that patient care does not suffer during this time period. Let's all pledge to be flexible and help each other, and cross-train as much as possible to make all our jobs easier.

We will all be working five hours of overtime for three weeks. To facilitate this phase, no vacation or leave other than the traditional Labor Day holiday can be scheduled for September this year.

## Phase III

We will all join the electronic age together during Phase III, and there will no doubt be a few glitches we need to work out. By acting as a team to find solutions and support each other, we will make Blackbird Medical Group more successful, keep our 'family' atmosphere, and ensure even better care for our patients.





# BENEFITS

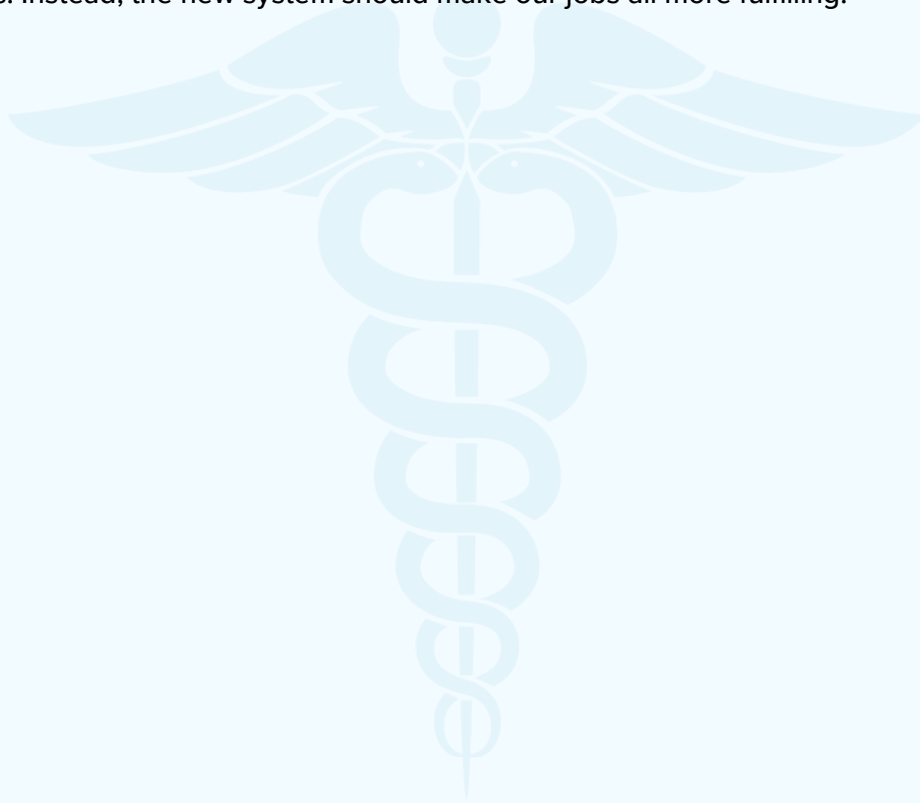
Why switch to an electronic medical records system? The benefits we expect to realize are summarized below.

- **More efficient patient tracking** – With the EMR system, we can bring up all records for a patient in a single name search, and then easily search within those records to find the exam history, test results, prescriptions written, and so forth. MRIs, ultrasounds, and other images will be scanned into the record. No more paging through reams of documents in multiple paper files.
- **Reduction in errors** – The EMR system has various checks and balances built in. For example, new prescriptions are compared against other medications and supplements a patient has been prescribed, and any possible drug interaction or past drug intolerance will be brought to the attention of the physician before final authorization for the prescription.
- **Health alerts and recommendations** - The EMR system will automatically alert physicians and staff when test results for a patient are abnormal, allowing us to immediately remedy hazardous situations such as dangerous glucose levels, high blood pressure, and indicators for cancer. In addition, the system includes links for dietary and exercise recommendations that can be individualized and printed for the patient.
- **Automated prescription forwarding and tracking** – The EMR system will automatically bring up contact information for pharmacies in our area, and with the press of a button we can forward prescriptions to the patient's preferred pharmacy. This system will also track refills, which can be requested (with a proper passcode) from a patient's home computer.
- **Time savings** – Compared to our current methods of examining and comparing paper files, it's pretty obvious that the EMR system will save us time. This will allow physicians and nurses to spend more time with patients and/or to take on additional patients.



- **Better record security** – Although we have always complied with HIPAA standards for patient privacy and data security, now we cannot easily track when or to whom patient records are transmitted. We also cannot know if some part of a file is missing because we have no record of everything contained within a file. The new EMR system will allow us to control access through settings on the computer, and will also provide us with an audit trail of every time a patient's record was accessed, letting us know who accessed the record and what was changed.
- **More efficient billing** – Most of the major insurance providers are linked to the EMR system, so prescriptions and procedures can be easily pre-approved and billing data can be easily sent to the patient's insurer.
- **Electronic Health Records (EHR) Stimulus payments** – With our system in place, our practice will qualify for federal stimulus payments authorized by the U.S. government.

The federal government clearly believes it's time to make all health records electronic, and so do we. The transition from our current system will not be painless, but it will be well worthwhile in the long run. Adopting an EMR will not replace any of our staff members. Instead, the new system should make our jobs all more fulfilling.



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