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Seminar Toolkit

Finding An Electronic Health Record System For Your Future: The 2025 *OPEN MINDS* Seminar On Best Practices In EHR Selection, Contracting & Optimization

Finding An Electronic Health Record System For Your Future – Best Practices In EHR Selection, Contracting & Optimization: Seminar Toolkit

Monica E. Oss, Chief Executive Officer, *OPEN MINDS*

Thank you for downloading The *OPEN MINDS* Seminar Toolkit, a supplemental guide to Finding An Electronic Health Record System For Your Future: The 2025 *OPEN MINDS* Seminar On Best Practices In EHR Selection, Contracting & Optimization, sponsored by Core Solutions, a signature part of The 2025 *OPEN MINDS* Technology & Analytics Institute.

Electronic health record (EHR) selection has been a key issue for more than two decades. While adoption is now widespread in many settings, challenges remain. Those challenges include provider organizations that have still not fully implemented a comprehensive, enterprise-wide EHR. Choosing the right system is becoming more important than ever. Health and human services executives must evaluate not only system functionality, but also return on investment, financial sustainability, and the selection of a vendor that can act as a long-term technology partner.

The toolkit is designed to equip you with the practical steps for selecting the right EHR for your organization. The articles will guide you through assessing the technological functionality that is needed, how to leverage an EHR for operational and strategic success, and how to assess the return on investment.

Then, on October 21, 2025, join Joseph P. Naughton-Travers, EdM, Senior Associate at *OPEN MINDS*, for the in-person seminar featured at The 2025 *OPEN MINDS* Technology & Analytics Institute. Our industry experts will guide you through a step-by-step process for selecting your EHR.

I hope you will take advantage of all the toolkit and seminar offered, and feel free to reach out to jnt@openminds.com with any questions on selecting your EHR.

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From EHR To…?

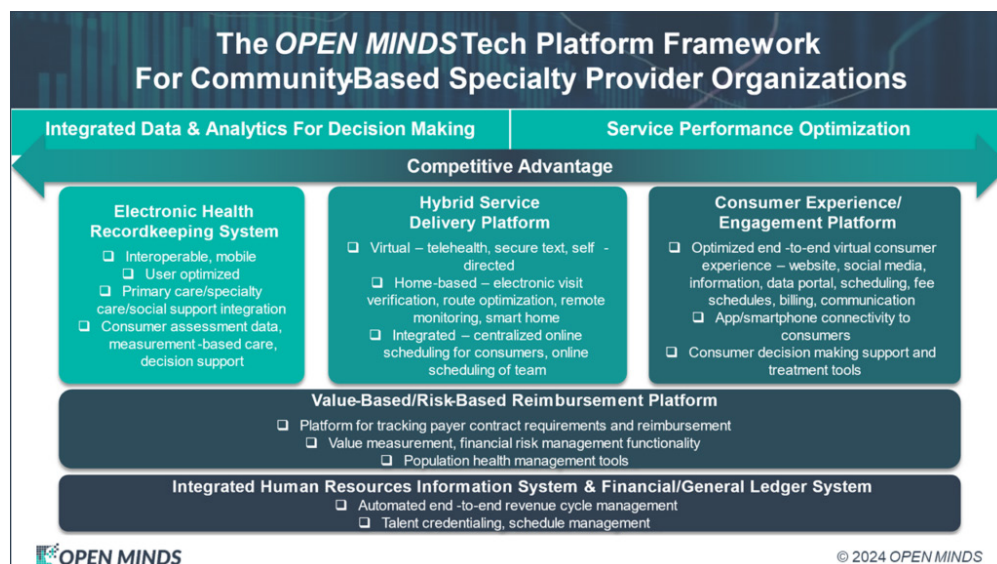**By Monica E. Oss, Chief Executive Officer**

At our first *OPEN MINDS* technology institute, almost two decades ago, our keynote speaker from Rand Corporation spoke to the new electronic health recordkeeping system (EHR) mandates. His take was that the EHRs would benefit payers and health plans by gathering clinical data and automating payment processes, but the financial benefit to provider organizations would be insignificant.

Skip ahead two decades, and we do see a financial return on investment (ROI) for provider organizations investing in an EHR (see Assessing The ROI Of Strategic Technology Investments and Finding An Electronic Health Record System For Your Future: The 2023 *OPEN MINDS* Seminar On Best Practices In EHR Selection, Contracting & Optimization). When integrated into clinical workflows, EHRs have the ability to provide clinical decision support and improve clinical analytics...

Previously Published – Newsletter Article, July 12, 2024 — openminds.com/market-intelligence/editorials/from-ehr-to/

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The *OPEN MINDS* Tech Platform Framework For Community-Based Specialty Provider Organizations

Integrated Data & Analytics For Decision Making	Service Performance Optimization

Competitive Advantage

Electronic Health Recordkeeping System
- Interoperable, mobile
- User optimized
- Primary care/specialty care/social support integration
- Consumer assessment data, measurement-based care, decision support

Hybrid Service Delivery Platform
- Virtual – telehealth, secure text, self-directed
- Home-based – electronic visit verification, route optimization, remote monitoring, smart home
- Integrated – centralized online scheduling for consumers, online scheduling of team

Consumer Experience/ Engagement Platform
- Optimized end-to-end virtual consumer experience – website, social media, information, data portal, scheduling, fee schedules, billing, communication
- App/smartphone connectivity to consumers
- Consumer decision making support and treatment tools

Value-Based/Risk-Based Reimbursement Platform
- Platform for tracking payer contract requirements and reimbursement
- Value measurement, financial risk management functionality
- Population health management tools

Integrated Human Resources Information System & Financial/General Ledger System
- Automated end-to-end revenue cycle management
- Talent credentialing, schedule management

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The Tech Strategy Path
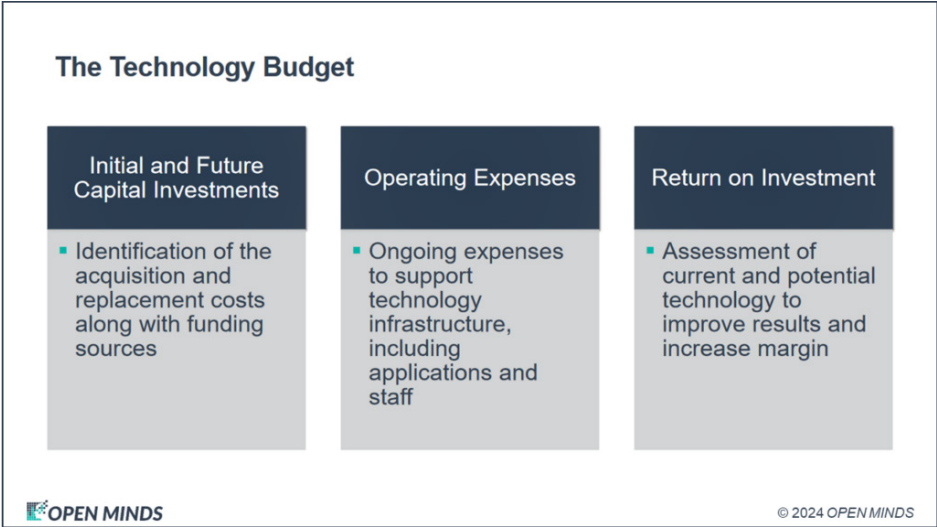
By Monica E. Oss, Chief Executive Officer

Technology for health and human service provider organizations is more complicated than just a decade ago. Previously, community-based provider organizations focused their technology investments on electronic health record keeping systems (EHRs)—with separate systems for managing both human resources and finances. Now the role of the EHR has shifted to serving as the central platform for a wide range of technology functionality and investments.

Emerging requirements for technology investments are many. There is clinical decision support systems (see Evidence-Based Information In The EHR Supports Teamwork And An Improved Clinician Experience) and

systems to support value-based reimbursement (see Shift To Value-Based Care Brings New Desires For EHR Capabilities). Provider organizations need enhanced systems for hybrid service delivery (see More Hybrid Virtual Care And Asynchronous Telemedicine On The Way For 2024)....

Previously Published – Executive Briefing, June 3, 2024 — openminds.com/market-intelligence/executive-briefings/the-tech-strategy-path/

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The Technology Budget

Initial and Future Capital Investments	Operating Expenses	Return on Investment
▪ Identification of the acquisition and replacement costs along with funding sources	▪ Ongoing expenses to support technology infrastructure, including applications and staff	▪ Assessment of current and potential technology to improve results and increase margin

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EHR Strategy In A Changing Behavioral Health Landscape: A Discussion With Brian Craft, Vice President of Product, Radicle Health

By The Market Intelligence Team

Brian Craft, Vice President of Product, Radicle Health, & Monica E. Oss, Chief Executive Officer, *OPEN MINDS* **discuss how behavioral health and human services providers are leveraging EHRs to adapt operationally and strategically to major shifts in funding, policy, and payer dynamics.**

Behavioral health and human services providers are facing a new era of uncertainty—shrinking grants, shifting payer expectations, and the loss of federal oversight are reshaping how care is funded and delivered. In this insightful interview, Brian and Monica explore how provider organizations are reevaluating their EHR strategy to meet the challenges of an evolving landscape. From managing social needs data and value-based care reporting to preparing for uninsured populations and workforce shortages, Brian shares how EHRs can move from compliance tools to strategic assets.

Mr. Craft brings over 15 years of experience in health IT product strategy, with a focus on building scalable, mission-driven solutions. He currently leads the development of EHR and care coordination tools for behavioral health and human services providers at Radicle Health. Brian is passionate about helping providers navigate regulatory change, improve operations, and deliver better outcomes.

Previously Published – Executive Education On-Demand, August 21, 2025 — openminds.com/market-intelligence/presentation/ehr-strategy-in-a-changing-behavioral-health-landscape-a-discussion-with-brian-craft-vice-president-of-product-radicle-health/

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Carry-On EHR

By Monica E. Oss, Chief Executive Officer

The requirements for clinicians to "document" their work started with third-party payment. Without documentation (the right documentation), there is no payment.
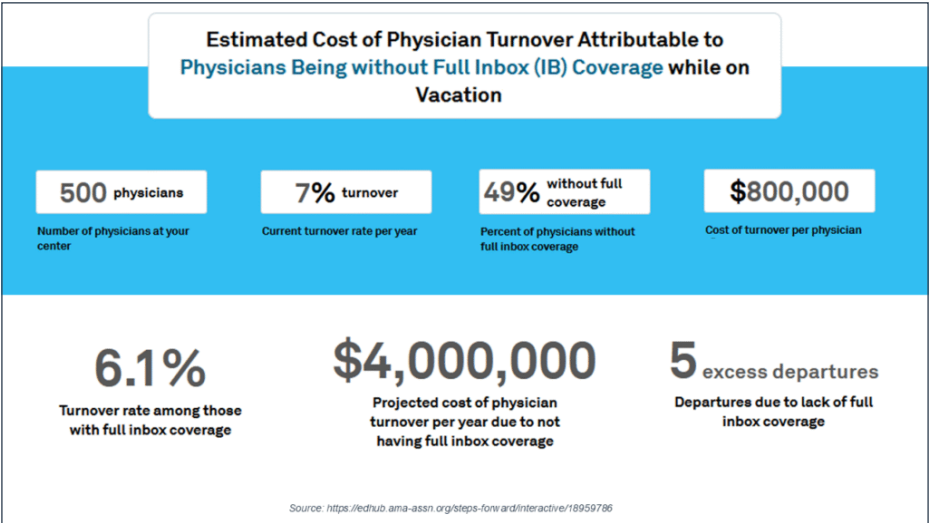
Over the years, the documentation process has changed from documentation on paper files to documentation using a computer. And the advent of electronic health records (EHR) mandates shifted that documentation to those systems (see The Clinician-Friendly EHR).

But most EHR systems weren't built with the clinician in mind. They were built to get electronic billing information to payers and health plans and the results reflect those early designs. A study found that primary care practitioners spend more than 50% of their workday using their EHR—355 minutes (5.9 hours) of an 11.4 hour workday (see Primary Care Doctors Spend More Than 50% Of Workday On Documenting In The EHR)...

Previously Published – Executive Briefing, August 4, 2025 — openminds.com/market-intelligence/executive-briefings/carry-on-ehr/

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Estimated Cost of Physician Turnover Attributable to Physicians Being without Full Inbox (IB) Coverage while on Vacation

500 physicians	**7%** turnover	**49%** without full coverage	**$800,000**
Number of physicians at your center	Current turnover rate per year	Percent of physicians without full inbox coverage	Cost of turnover per physician

6.1%
Turnover rate among those with full inbox coverage

$4,000,000
Projected cost of physician turnover per year due to not having full inbox coverage

5 excess departures
Departures due to lack of full inbox coverage

Source: https://edhub.ama-assn.org/steps-forward/interactive/18959786

# The 'Tried & True' Process: EHR Vendor & System Selection

By Joe Naughton-Travers, Ed.M., Senior Associate

Nearly a third of specialty provider organization executives don't have an electronic health record (EHR) system that is fit to achieve their strategic objectives in the next five years. If that sounds bad, it gets even worse—34% of provider organizations haven't fully implemented their EHR, with many reporting that their EHR are failing to meet organizational needs for consumer portals, mobile access, value-based reimbursement contracts, electronic visit verification, integrated telehealth, and analytics (see The *OPEN MINDS* 2021 National Behavioral Health Electronic Health Record Survey).

This severely limits the strategic viability of an organization, considering that a fully implemented EHR is one of the foundational elements in a future-prepared technology platform framework...

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The *OPEN MINDS'* Technology Framework Domains
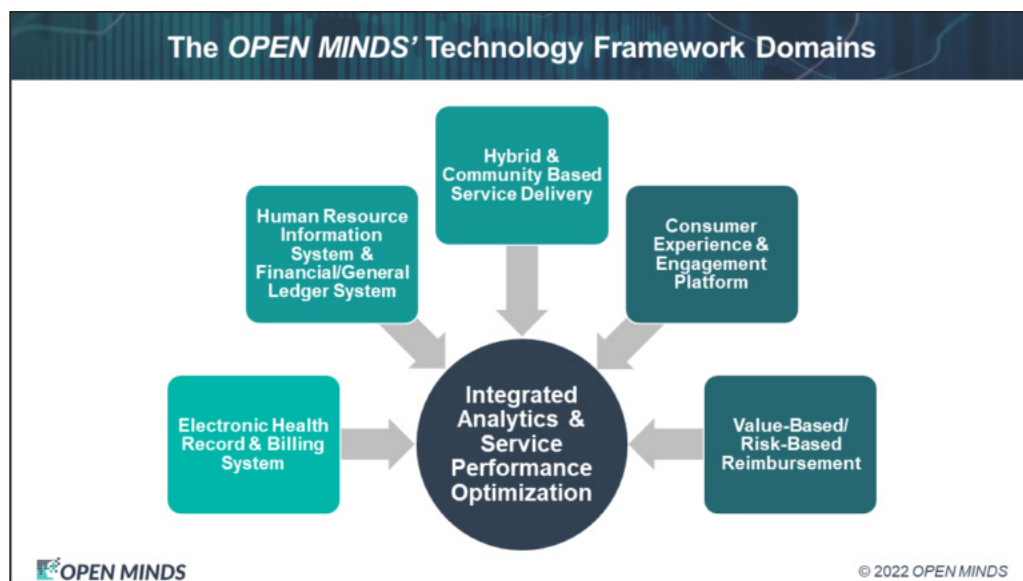
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The Clinician-Friendly EHR

By Monica E. Oss, Chief Executive Officer

Twenty-four years ago, at our first *OPEN MINDS* technology institute, I remember our keynote speaker from Rand Corporation talking about the electronic health records (EHR) mandates. His take was that the EHRs would benefit payers and health plans by gathering clinical data and automating payment processes, but the financial benefit to provider organizations would be insignificant.

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Record System For Your Future: The 2023 *OPEN MINDS* Seminar On Best Practices In EHR Selection, Contracting & Optimization). When integrated into clinical workflows, EHRs have the ability provide clinical decision support and improve clinical analytics...

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Implementation is a Challenge

Five reasons are:

1. Misaligned expectations–"Once we have this software implemented, we will have increased productively."
2. Data Maintenance –"The systems will provide protection against malformed or unusable data."
3. Lack of readiness –"We don't have time to give everyone training on the new system, they will learn as they go."
4. Internal resistance – "I don't' know why we need a new system; I like the old one."
5. Improper post-deployment planning- "We don't need dedicated resources for training and end-user support."

Some experts in the field estimate that **75%** of implementations are either over budget, over schedule, or don't produce what is needed.

QUALIFACTS

Tech ROI – More Than Numbers

By Monica E. Oss, Chief Executive Officer

What are the key issues in successful electronic health record (EHR) implementation? According to a report, of 25 Years Of Electronic Health Record Implementation Processes: compliance, collaboration, competence, and cost.

The more pressing issue for most executive teams is how to best address the challenges endemic in each of these implementation process issues. The study authors identified a number of factors that determine the success or failure of an EHR implementation. At the start, once the decision has been made to acquire

new technology, executives need to develop a detailed implementation project plan and establish their internal cross-functional teams to support the implementation from planning to launch...

Previously Published – Executive Briefing, July 9, 2025 — openminds.com/market-intelligence/executive-briefings/tech-roi-more-than-numbers/

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Assessing Technology ROI

- **ROI Framework:**
  - Revenue maximization
    - Faster billing cycle and fewer delayed claims.
    - Batch billing.
  - Cost Optimization
    - 5% - 10% cost reduction through gains in operational efficiency.
    - Reduced TCO.
  - Quality Improvement
    - Better data > better information > better decision making!
    - Reduced productivity after go live.
    - Improved staff satisfaction and performance, better outcomes.

- **Use NPV and payback valuation with appropriate discount rate to compare options and achieve THRIVING organizational margin goal.**

The ROI Of Strategic Technology: The Easterseals Midwest Case Study

By The Market Intelligence Team

This *OPEN MINDS* Executive Roundtable was delivered on June 19, 2025, by Jeff Arledge, Executive Vice President and Chief Financial Officer for Easterseals Midwest. He presented the essential components of his electronic health record (EHR) selection plan, and the process for a successful EHR adoption. He shared how the selection process starts with great strategic planning that delivers a clear understanding of the organization's future market positioning, service lines, and the EHR functionalities necessary to support that. This included how to select the right team, how to adopt effective change management practices, and overcoming selection fatigue.

Executive attendees of this session:

▪ Gained insights on how to align the technology plan with the strategic plan.

▪ Discussed examples of using technology budgeting to leverage staff and resources to operate more efficiently and create a competitive advantage.

▪ Identified how to assess the return on investment between different technology options by estimating potential revenue increases or cost reductions.

This roundtable is part of the *OPEN MINDS* CFO Consortium, sponsored by ContinuumCloud. the *OPEN MINDS* CFO Consortium was developed to provide executives with the tools and abilities to strategically assess and position their organizations for long-term sustainability and growth. The consortium is open to all Elite members; to learn more and sign up, visit https://openminds.com/open-minds-cfo-consortium/.

Previously Published – Executive Roundtable, June 20, 2025 — openminds.com/market-intelligence/presentation/the-roi-of-strategic-technology-the-easterseals-midwest-case-study/

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