Choosing to take the plunge from paper charts to an electronic medical records (EMR) system can be a daunting task for both new and established practices. The options for software particularly suited to aesthetic surgery practices is growing day by day. This addition to a practice is not for everyone, so there are a few things to keep in mind when trying to make your decision.

**WHY DO YOU NEED AN EMR?**

The first thing to consider is why you need an EMR. An EMR in an aesthetic practice is very different from that of an insurance-based practice and can be a way of saving precious time and money in the long term. Most newer programs can include built-in algorithms to give automatic patient reminders for appointments and treatments, as well as give automatic emails or text messages for certain occasions. For example, the system could generate a discount during the month of your patients’ birthdays. This keeps your patients engaged with your office while maximizing the time your staff has with them when they are in the office.

Most EMRs also itemize revenue based on specific treatments and products so that detailed financial reports can be generated on a monthly or weekly basis. Yes, this can be done without an EMR, but you are often relegated to keeping track of an endless list of spreadsheets susceptible to human error. Another reason to make the switch to EMR is to track marketing efforts in a proactive way. Each patient can be required to fill out exactly how they heard about the office. Over time, this can aid in decisions to keep or discard marketing investment based on data collected.

As you can see, for the small practice, actually writing and storing medical documents is often the least important reason to decide to use an electronic system versus paper charts.

**HOW DO I CHOOSE AN EMR?**

The first things to consider when choosing an EMR is your budget and what software or technical support will be required. In the past, systems required you to buy a large server and to maintain that server with fulltime tech support. Now that most software companies offer cloud-based solutions, that is no longer necessary. At the same time, you may still be required to upgrade your office computers and printers and/or add tablets depending on your software capabilities. Simplifying technical concerns leaves you to focus on the software functionality most important to your particular practice. Do you need to be able to bill to insurance companies? Do you want to have charges go directly through your EMR or just track revenue from it? Do you want your patients to be able to access a personal portal for their medical records?
The more systems you can demo the better. Choosing the right software program for your office should never be a hasty decision. It is much more difficult to move to a different EMR later on. Always remember that once you sign with a company you will never be talking to the salesperson again. They may give inaccurate information just to get a sale. Because of this, be sure that everything that you agreed to during the negotiation phase is in writing in a contract and not just a handshake agreement. Also, any long-term time commitments are a red flag that their product may not be the best in the end. A good software system will speak for itself without a three- to five-year contract.

WHAT IS THE EMR TRANSITION LIKE?

Implementation is what software companies call the phase in which all setup and staff training is done. This is when you will decide how your EMR will work for you. Most programs allow you to customize your own templates for patient notes, consents, emails, and intake forms. This is a lengthy process, but the stronger the foundation is at this phase the more time you will save once you start using the software. Keep in mind that most companies do all of their training via teleconferencing. A trainer will allow themselves to see what you are seeing on your screen and walk you through how everything works. On-site training usually comes with a hefty fee that most newer practices can’t afford. Teleconference sessions are generally limited to one hour at a time, and you may not get another chance to ask a question or make any changes for several days or even a week after the session.

How a company organizes their implementation process and the quality of technical support is, in my opinion, the most important aspect of choosing an EMR. It is in this phase that you see what type of customer support you will have versus what was sold to you. A good EMR software company should be able to get you through implementation in six to eight weeks. After the infrastructure is built during implementation you will be ready to transition any existing medical records and patient information into your EMR. Depending on how long you have been in practice, this may take several months to scan in paper charts. If the process seems too daunting, there are companies that can do this for you in much less time.

FLEXIBILITY TO GROW

Inevitably, there will be kinks to work out over time. With the right system; however, you should have flexibility to grow your practice while maximizing the amount of work your staff can do during office hours as well as keep accurate and concise records of your aesthetic procedures.

SARAH SAXON, MD

Sarah Saxon, MD is a double board-certified facial plastic and reconstructive surgeon who recently transitioned from academic medicine to a private office in downtown Austin, TX.

She is one of the few experts in facial feminization surgery and uses the most advanced techniques available to transform self-doubt into self-confidence.