

Summary of Results of AFHTO EMR Survey:

- PSS serves the majority of FHTs, accounting for 52.5% (2,510) of all users.
- PSS ranked lower than the overall average ratings in Purchase Experience, Implementation Experience and Clinical Satisfaction.
- The biggest area for complaint is with PSS Change Management and Support. Most comments mention that it takes a long time to talk to a PSS representative, resolve issues, and to meet FHT specific needs.
- Based on comments, the #1 bone of contention for users is a lack of communication from PSS
- PSS users are most satisfied with the Usability of the product.

Account Manager Proposal:

**To be supported by the FHT PSS User Group.

To address the communication issues, and many others, initially what we are proposing is that all members of AFHTO have the right to a 'proper' Account Manager process, as described below. It is only by this fundamental shift that we together can enact change in the unacceptable state the PSS/MD Physician Services is now in, plus enable those participating groups to have direct input into a mutual process. Further, would be the mutual selection and participation within acceptable working groups or forums between the client and PSS that looks at the needs of both vendor and client organizations going forward.

Included are the guidelines on an effective interaction/support process that needs to be in place. The Account Manager becomes the voice, the advocate and champion of the client – all areas that are currently an issue with the vendor can be resolved using this process – Support, Change Management, Communication, Purchase Experience, Implementation Experience etc. If used successfully it will also increase Clinical Satisfaction – and finally Usability and sales will be increased thru the continued endorsement of a satisfied group of clients.

1. Vendor should assign an Account Manager to the client.
2. Vendor should provide client with a Support Policy and Procedures Manual which clearly describes the services which are covered by your annual maintenance fees
3. The Account Manager should phone and introduce themselves to begin the relationship.
4. The Account Manager should visit clients to introduce themselves, view the site and to review the Support Policy and Procedures Manual with the client.
5. The Vendor should provide the client with a list of all the clients open tickets (frequency of report to be determined; depending on severity of issues, this could be weekly, monthly or quarterly). The report should include:
 - Ticket number, description, date opened, priority, type, status, scheduling priority, targeted delivery date, and a comment area
6. The Account Manager should set-up scheduled conference calls with the client. Discussion points could include:
 - Review of open ticket report – this is maintained by the vendor and includes all tickets throughout the vendor organization. Tickets are not closed by the vendor unless reviewed with the client.
 - Identification of top 5 priority tickets (client must identify these)
 - Severity levels of the tickets reviewed by the Account Manager with the client – clear understanding of the process on both sides and a methodology for clients to advocate for priority assignment
 - Updates on top priority tickets
 - Clear understanding of service (billable) requests (e.g. training) that the client wishes for their organization
 - Coordination of scheduling installation of software patches in development and live environments

- Enhancement requests that the client or group wants to advocate towards
 - Updates on new features, functionality and products
 - Request input from the client as to what they would like to see and have achieved
7. The Account Manager should **always** work towards the vendor resolving the client's top 5 issues (This is incredibly important).
 8. The Account Manager is responsible to work with their internal processes to escalate the client top priority issues.
 9. The Account Manager should provide schedule dates for each of the client's top priority issues.
 10. As each top priority issues is resolved, the Account Manager should ask the client to provide an additional priority issue so that there are always 5 issues in the queue.
 11. If additional services are requested, the Account Manager should provide timely, simple and concise cost estimates and contractual assistance if necessary.

Above all, the Account Manager is the voice of the client to the vendor. They should be your advocate and have the authority to enact change in their organization and have accountability to both the client and their own organization. **If client issues do not get resolved, it would indicate to me the vendor is not committed to the process.**