

## Things to Consider when Selecting a Charter/Approved OSCAR Service Provider

OSCAR EMR is affiliated with a network of Charter and Approved OSCAR Service Providers (OSPs) who have demonstrated they are capable of, and have committed to, installing and supporting the OSCAR software in compliance with relevant regulations and certifications. As a result, when you choose OSCAR, you have freedom of choice with respect to which Charter/Approved OSP you deem best fit for your needs. To support you in exploring your options, we've prepared a checklist of things to inform your assessment and decision-making process. **This checklist is provided as a guide only** – it is paramount that you exercise due diligence throughout the process as you would for all other key relationships that are critical to your practice.

For information on the differences between Charter and Approved OSPs, see the [Get OSCAR](#) Page on the OSCAR EMR website. For the purposes of the document, Approved OSPs refers to both Charter and Approved OSPs.

### Getting Started

1. Talk to other physicians using OSCAR and ask them what they like about their Approved OSP. If you don't know any OSCAR users or if you are looking for additional opinions, you could consider posting a question to the open-source OSCAR community via the OSCAR mailing list (<https://lists.sourceforge.net/lists/listinfo/oscarcmcmaster-bc-users>).
2. Be clear on what is important to you in an Approved OSP such as degree of on-site versus remote service, user training and related support, capability to do development/customizations, demonstrated success in migrating from another EMR or a different version of OSCAR, and software and hardware/network support versus software only. All Approved OSPs meet OSCAR EMR's minimum standards for service, training and ongoing support, but may choose to differentiate by delivering beyond minimum standards in some or all areas.
3. Review the Approved OSP's websites to get a sense of their company, the positioning of OSCAR relative to other applications and services they may offer, and the degree of alignment with OSCAR EMR's brand and vision – "One Cause. One Team. One OSCAR."

### Engaging with Your Preferred Approved OSPs

1. Before inviting Approved OSPs to provide a demo and meet with you in person, you may wish to consider sending a questionnaire to all on your shortlist to request their responses to questions that capture what is important to you (per Getting Started #2). You could also

- include with the questionnaire a request for customer testimonials.
2. Once you have identified the Approved OSPs you'd like to engage further, arrange a meeting for them to assess your needs and understand your context before preparing a quote.
  3. If based on the meeting you wish to proceed to a quote, request a detailed quote that covers the following categories and any others specific to your setting or needs. **Require that the quote provide written confirmation that all software, hardware and services quoted are in compliance with the requirements specified in OSCAR EMR's Quality Management System for OSCAR as an Affiliated Product of OSCAR EMR.** Please note that OSCAR EMR is not involved in the commercial pricing decisions of Approved OSPs so you may experience variance in pricing and other commercial terms between Approved OSPs.

Category	Items	Considerations
Main Hardware	Main server	<ul style="list-style-type: none"> <li>▪ Specify what hardware is included</li> <li>▪ Identify any items that will need to be purchased from a source other than the Approved OSP</li> <li>▪ Identify any items for which there are different options available with corresponding prices (e.g. options for off-site back-up)</li> </ul>
	Backup server	
	Off-site backup	
	USBs	
	Routers	
	Other	
Peripheral Hardware	Printers	<ul style="list-style-type: none"> <li>▪ Identify peripheral hardware you will require for your clinic workflow, and whether it will be supplied by the Approved OSP or will need to be sourced separately.</li> </ul>
	Scanners	
	Fax machines	
	Other	
Labs	CML	<ul style="list-style-type: none"> <li>▪ Identify which labs are relevant to your needs and context.</li> <li>▪ Specify whether required labs are included in the contract pricing versus charged incrementally.</li> </ul>
	Gamma-Dynacare	
	Life Labs	
	OLIS and HRM	
	Other	
EMR Transition and Data Migration	Demographics	<ul style="list-style-type: none"> <li>▪ Document EMR transition/data migration plan, specifying scope, method, timeline and risk mitigation strategies (e.g. data validation before go-live; minimized downtime; etc.).</li> <li>▪ Request confirmation of Approved OSP's previous experience with similar EMR transitions, supported by references.</li> </ul>
	Schedule	
	Billing	
	eChart	
	Other	

Category	Items	Considerations
Settings	Standard forms	<ul style="list-style-type: none"> <li>Identify which forms and templates are relevant to your needs and context.</li> <li>Identify any forms or templates that are recommended to be developed to meet your needs and context.</li> </ul>
	Templates	<ul style="list-style-type: none"> <li>Specify which forms and templates are included in base pricing versus charged incrementally.</li> <li>Where forms or templates require development, confirm option for you to do the development in-house (where relevant) or engage a developer other than Approved OSP if preferred.</li> </ul>
eForms	Pre-made eforms	<ul style="list-style-type: none"> <li>Identify which of the pre-made eforms freely available from the open-source OSCAR community will be loaded into your OSCAR system.</li> </ul>
	Custom forms	<ul style="list-style-type: none"> <li>Identify any custom eforms that are recommended and corresponding cost if developed by Approved OSP.</li> <li>Confirm option for you to do the development in-house (where relevant) or engage an alternate developer if preferred.</li> </ul>
Ongoing Support Services	Hardware	<ul style="list-style-type: none"> <li>Specify terms of ongoing support services for software and hardware.</li> </ul>
	Software	<ul style="list-style-type: none"> <li>Identify if pricing includes regular maintenance of the OSCAR software (e.g. application of fixes as relevant) and upgrade to new versions, or if these are charged incrementally.</li> </ul>
Customizations	Software modification	<ul style="list-style-type: none"> <li>Identify required and/or desired customizations that require modifications to the core OSCAR software.</li> </ul> <p><b>Note:</b> OSCAR EMR strongly encourages this category be separated from the main contract for servicing and supporting the OSCAR system. Quotes should include requirements, mock-ups (where relevant), a workplan, an <b>approved OSCAR EMR Change Request</b>, and corresponding costs <b>prior to</b> signing a contract to proceed with development. Also recommend the development contract explicitly require compliance with OSCAR EMR's code management processes and contribution of modifications to OSCAR EMR for inclusion in the core OSCAR software, with final contract payment contingent on confirmation of successful receipt of the code by OSCAR EMR.</p>

## Evaluating Quotes and Selecting Your Approved OSP

1. Once you have received the requested quotes and have narrowed your selection to a final list (e.g. 1-2), you may want to request permission from your preferred Approved OSPs for the following to further inform your decision-making:
  - i. Speak or meet with references provided by the Approved OSP
  - ii. Share the quote provided with OSCAR EMR for independent verification that the software, hardware and support services are compliant with OSCAR EMR's requirements (*Note: OSCAR EMR will not make a recommendation pertaining to Approve OSP selection, but we are happy to support you in verifying that the quoted services meet requirements.*)
2. You may also consider asking the Approved OSPs for disclosure of any outstanding Corrective Action Requests (CAR). A CAR is issued by OSCAR EMR when an area for improvement is noted related to compliance with the requirements of the Quality Management System. A CAR alone does not signal concern in the context of a commitment to continuous quality improvement, however, understanding any CAR that the Approved OSP is addressing ensures the relationship is founded on full disclosure, building trust and understanding.
3. Consideration of the commercial terms of the service contract with the respective shortlisted Approved OSPs may also be of value, as there may be differences that inform your assessment of fit and alignment.
4. Upon selecting your preferred Approved OSP and reviewing the service contract, we strongly recommend including the explicit requirement that the Approved OSP at all times ensure compliance with the terms of OSCAR as an Affiliated Product of OSCAR EMR, and that breach of such compliance be grounds for termination of the service contract.

**Welcome to the OSCAR community! We hope this checklist is helpful to you, and invite you to contact OSCAR EMR if at any point we can support you with further information or clarification. We can be reached by phone at (905) 385-3378 ext. 101 or by email at [info@oscar-emr.com](mailto:info@oscar-emr.com).**