Considerations When Purchasing Occupational Health Software

1. Introduction

It is increasingly common for Occupational Health (OH) services to use some form of electronic record management system. The right programme will help meet record keeping standards, implement and audit clinical protocols, deliver management information and through this, provide a demonstrable return on investment.

There are many software providers to choose from, with different configurations and technologies. Here is a simple guide to choosing the one that best suits your needs.

2. Where to Start

Assemble a selection team, comprising users & stakeholders of the software.

Assemble a tight, multi-faceted and relevant team. While solo decisions and progress are often quicker and easier, there is a significant risk (and potential cost/loss) if an OH professional, in the course of software selection, makes decisions impacting Human Resources (HR), Information Technology (IT), Administration and ultimately the end users, without their involvement.

For efficiency and effectiveness, select the minimum number of team members possible, whilst still providing the broadest knowledge base. This team should be aligned with a clear and achievable objective.

Consider other related departments.

Other departments such as Health & Safety or HR will potentially need to be involved as they may want to have an interface with the OH system or require specific information from it. Therefore, consideration needs to be applied as to what features the OH system needs to have to support their requirements. If appropriate ask the provider whether they have other software applications that could work alongside the OH solution to deliver services to related departments.   In the case of IT, their approval of new software may often be a company policy requirement necessary to avoid subsequent technical problems.

Actual users & stakeholders can aid proper selection.

The people who will use the software are unsurprisingly a valuable resource in effective selection. It is an opportunity to broaden this group's involvement, in order to "reality check" the selection process to date and incorporate feedback from a practical perspective.

Seek to understand existing users' views on the limitations of existing systems and what improvements could aid business efficiency and effectiveness. For example:

- Ask your administration team about the limitations of your current processes.

- Does invoicing take too long resulting in decreased productivity?

- What other features would your internal users like to have? For example, OH is often an employer and should consider that its own staff may have disability needs that software may need to adapt to meet e.g. screen reading capability, altered fonts or colours etc.

- How would they save time and increase profitability?

- Reporting and displaying management information is increasingly an important requirement. The ability to report regular KPIs and easily undertake detailed searches for specific data, hot stops and trends is also important.

- A key issue that the FOM Ethics Committee Chair is asked a number of times each year is that of data migration at the end of a contract – can records be easily exported? Does this function require an additional fee to achieve from the host provider or support team? This will be addressed in more detail in a SOM Guidance note.

This will quickly point to any inefficiencies in your current processes and alert you to the features you should look for in potential packages. Furthermore, this has the added benefit of accelerating internal support when implementing your new software. Employees will be much more receptive to a package that improves their workflow.

Similarly, other stakeholders' input can now be broadened. HR, IT, Administration, and others impacted by this software implementation will all have potentially constructive input.

While this broad inclusion can be tremendously beneficial in effective selection, it equally needs to be managed towards clear conclusions within specified time periods. The downside risk is that, **without robust leadership**, this stage could degenerate into unfocused and circular noise.

3. Context

Why do you need OH software?

The first step is clearly understanding your reasons for shopping for new software. Make a list of the challenges you'd like the software to address (and ultimately solve) and then separate it into two categories: Needs and Wants.

I. *Needs:* Review your existing processes and workflows. This will help you to identify software requirements most suitable for your current objectives and future needs.

II. *Wants:* These can be much broader. Features should be listed in order of importance, encompassing all of the capabilities that will make life easier. For instance, you may need a specific reporting format. Every business is unique – ensure the system you choose is flexible and customizable enough to meet the majority of your needs and wants. Don't forget to ask the software provider if their product can be adapted to fit your unique needs.

4. Affordability

Determine your budget.

Calculate how much you can afford to spend, including any new hardware needed as well as first-year support. The cost of the software is important and knowing the recurring costs is essential.

Typically, there will be need for a business case justifying the commercial validity of this project. This may just be for yourself playing "devil's advocate", although it is more likely to be for the benefit of third parties (department, committee or the board). What information do you need to complete it?

At its simplest, the project's benefits should outweigh its costs, both quantitatively and qualitatively.

Remember the internal costs.

In addition to the costs applied by each software provider, don't forget to ask internally within your organisation about any potential costs that could be cross-charged to your department. Does your IT Department levy a cost for sourcing/installing hardware or installation of software? Will there be a charge by IT for assisting with software upgrades? Likewise for your Data Team, do they cross-charge for their input and assistance?

Ask about potential additional costs.

Some software providers apply additional costs to upgrade to a newer version of software while others include upgrades within the Support or Subscription cost. Make sure to confirm with the provider before purchasing.

Are there any start-up costs or maintenance fees? Providers might have fees that have to be paid before getting started. Ensure to ask about this before buying.

Ensure end user training does not incur additional costs for participants.

5. First Cut

Identify potential providers and software.

When you are equipped with your Needs list and preliminary budget, you should be able to quickly identify which providers you would like to provide you with a demonstration. All of the software providers should have websites available allowing you to review key features and benefits. It is a good idea to pay attention to providers who are clearly designing products with the future in mind. This is evident if they are using platforms and technologies that are supported by industry leaders.

Select 3 to 4 providers that exhibit a good fit based on factors such as:

- Size or type of business, relevant to you and your business.

- Provider longevity: the supplier and its product(s) are expected to remain in business.

- Depth of product line: more than one relevant product helps ensure best fit for you and demonstrates supplier knowledge and capability in the subject area.

- Breadth of product support: Software that lacks ongoing customer support can easily become unusable.

- Produce scalability and evolution: focus on companies that are clearly designing products with one eye on the future, i.e. they are building products that will easily integrate with other software packages and they are using platforms and technologies that are supported by industry leaders.

- Project implementation services and specialist subject matter expertise are important factors too.

I. Contracts/SSAs.

Before making a purchase make sure to ask about software and support contracts. Some providers may not have a contract but could require you to sign a support contract for a year or longer.

II. On Premise vs Hosted Solution.

You will need to decide whether to have the software installed on your own premises, or to take advantage of the provider's hosted solutions. Both can have their benefits but will require some IT input to decide the most appropriate. An on premise solution allows you to keep control of all the data and security controls yourself, but would require significantly more input from your local IT team. A hosted solution passes the responsibility for managing and securing the system to the provider who will be experts in managing their own software.

III. Data.

Provider Accreditations.

Data is the most important aspect of your computer system. It is vital that any potential provider share in this understanding and do all they can to evidence that they take seriously the safety, security and resilience of your data. Don't hesitate to ask for physical evidence of any accreditations, such as certifications of ISO 27001, Cyber Essentials Plus, etc.

Data Protection

What password protection / entry systems are available within the system (ideally two factor authentication) and does the system enable you to easily set up different levels of user access according to role? It is also important to ensure that you are compliant with The General Data Protection Regulation (GDPR) to avoid keeping information that is not actively needed; can you selectively delete data?

Data Backups.

Hardware can fail for any number of reasons, data can be corrupted, and computers can be lost, stolen or destroyed. Ensure there are backups of your data that do NOT reside on your computer. Whether you purchase a hosted or on-premise solution it is important that you understand how your data is backed up and how often.

Penetration Testing.

Penetration testing is a core tool for analysing the security of IT systems. Ensure that the provider regularly performs penetration testing using a CREST accredited company.

Support Policies.

Each software provider could have very different Support Policies so be sure to obtain copies of policies beforehand. Pay close attention to the hours of Support Help Desk availability, including the process for out-of-hours requests and any additional associated costs. What methods of support does the provider offer (phone, email, online, face-to-face, etc.)? The support you receive on an on-going basis is just as important as that provided initially. Ask to speak to other customers to find their experiences of utilising the Support services.

Some providers may levy additional costs for specific medical devices (audiometry, spirometry) so you need to ask.

Does the software work on single or multiple locations?

You may need to access the software from multiple locations. Some providers might make claims that their software supports multiple locations, but you need to look at what is actually provided.

Training.

If this is your first software system or you are considering a change, there is always a learning curve. Make sure you know what type of training will be provided. Will the training be delivered to all end users or will there be a train-the-trainer approach? Will the training be held in an environment that encourages participation and questions can be asked?

Ask the tough questions.

Don't be afraid to ask potential providers why some of their customers chose to leave. Remember, every company is going to have customers leave so don't let their answer scare you. But how a provider responds will let you know how involved they are with their customers and how they view themselves as a provider. Speak with other businesses who are using their software, join social media sites that have consignment/resale groups and ask questions through LinkedIn groups.

6. Evaluate

Here are some potential questions to ask yourself:

a. How well do the software products meet your Needs & Wants?

b. Which software packages satisfy most features highlighted on your Wants list?

c. Can the product expand to meet your anticipated future requirements? Even if not in your budget now, you may be able to purchase add-on modules in the future.

d. What product enhancements are planned? Are they features that will be useful to you and how quickly will they become available?

7. Second Cut

Select the software providers that best fit you.

Ensure that you have had demonstrations of each of the product for selection. This will allow you to familiarize yourself with the actual interface and see how some of the key functions work in real life, rather than just through the prism of a marketing presentation.

Some facets to look out for:

• Look for good design and clearly marked functions.

• Is it easy to figure out how to record the data you collect?

• Can you easily switch functions and does the software allow you flexibility in creating new records or are you restricted to following a prescribed data entry procedure?

This is a real test of which products are going to be a good fit. You should rule out software that is under-or over-qualified for your business and narrow down to two or three products that you are comfortable with.

8. Final Cut

Actual users & stakeholders can aid proper selection.

Before making a final decision, ensure that you are comfortable with both the product and the vendor. If you feel that the salesperson is not able to provide you with the information you need, don't be afraid to ask to speak with someone else.

It is important that you feel comfortable with your decision - you will be spending money and, more importantly, time in implementing your new software and will ultimately have to work with it.

9. Who will make it happen?

Select your internal implementation team.

Consider appointing an internal implementation team and an internal project manager. Implementation, especially of something new, is a time of great change and needs to be managed effectively.

As mentioned earlier, it is important to involve your IT resource (department, contractor, relatively most knowledgeable person in the office, etc.) at an early stage. If you are hosting the system locally, they will also need to appoint an implementation team.

10. Double check

Final review that it all makes sense.

Review the information from both the vendor and implementation service provider to ensure that the products you are purchasing dovetail with the services you have planned. This should prevent gaps at the implementation stage and provide an opportunity to both finalise upfront costs and project ongoing costs for training, support and maintenance on a yearly basis.

11. Countdown to launch

Map out an effective and realistic timeline.

Plan your implementation carefully to avoid peak busy times and to allow for system downtime, ensuring that no data is lost during the transition period. Schedule the implementation during less stressful times and let your provider work to ensure a seamless transition from your old system to your new one.

Most systems will allow you to begin implementation at any time, without any loss of data or additional work.