

## Appendix A

### Research Methodology

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For these assessments, Sujansky & Associates, LLC collected data from FOSS EHR project leaders, third-party support firms, and practice sites via telephone interviews. Also reviewed were the projects' organizational websites and existing product reviews. Following data collection, an initial analysis was undertaken to determine the general characteristics of the projects and to array them into groups for subsequent detailed reviews, high level overviews, or no further evaluation.

**Data Collection:** Data was collected via interview guides specific to the types of respondent interviewed. 1 and 2 provide an overview of the topics addressed by these interview guides.

**Table 1 – Data Collection Surveys Used (Project Leaders)**

Respondent Type	Survey Category	Topics Addressed
Project Leaders [Interviewed For Detailed Assessments and High-level Overviews]	Background	Project History
		Thought Leaders and Funding
		Organization Description
		Data Migrations
		Licensing Model
	Architecture	Overview and Open Source Stack
		Compatible Open Source Add-ons
		Compatible proprietary Add-ons
	Development Community	Data Migrations
		Feature Prioritization
		Testing and Bug Tracking Methodology
	Available Services	Hardware and Software Installations
		Data Migrations
		Interface Development
		Training Options
		Support Plans
		Updates and Patches
	Functionality	Practice Management Features
		EHR Features
		Reporting Capabilities
		Billing Integration
		API/HL7 Interfacing
		Patient Record Import/Export
		Document Management
	Costs	Hardware, Network Infrastructure, and Backups
		Installation, Data Migration and Configuration
		Customization and Interfacing
Training and Support		
Future Directions	Long Term Goals of Project	
	New Features	
	CCHIT Certification Plans	

**Table 2 – Data Collection Surveys Used (Support Vendors and Practice Sites)**

<b>Respondent</b>	<b>Survey Category</b>	<b>Topics Addressed</b>
Third Party Support Vendors [Interviewed For Detailed Assessments Only]	Background	Support Firm Description
		Involvement with FOSS EHR Project
		Contributions to Code Base
		Other FOSS HIT Support
	Available Services	Hardware and Software Installations
		Data Migrations
		Interface Development
		Training Options
		Support Plans
		Updates and Patches
	Costs	Hardware, Network Infrastructure, and Backups
		Installation, Data Migration and Configuration
		Customization and Interfacing
Training and Support		
Practice Site [Interviewed For Detailed Assessments Only]	Background	Practice Demographics
		Reasons for Choosing FOSS HER
		Existing Systems
		IT Experience and Resources
	Implementation	Duration of Use
		Degree of Use
		Satisfaction Level and Identified Gaps
		Projected EHR Lifespan
		Transition to Paperless Medical Records
		Cost to Date
	Functionality	Practice Management Features
		EHR Features
		Reporting Capabilities
		Billing Integration
		API/HL7 Interfacing
		Patient Record Import/Export
	Document Management	
	Use of I.T. Support	Self Support vs. Hired Support
		Hardware and Software Installation
		Data Migration
		Interfaces with Existing Systems
Training		
Support		

Information was collected from project leaders, support vendors, and system users exclusively via telephone interviews. Contact information for practice sites and third-party support vendors was obtained directly from the FOSS EHR project leaders that participated in the interviews. In many cases, the practice sites interviewed were the primary reference site(s) of the EHR FOSS projects, which obviously may have introduced bias into the analysis. However, the practice sites did not hesitate to describe

the ways in which an EHR application failed to meet their expectations, so the degree of bias, if any, was likely minimal.

***Data Analysis:*** Information gathered from participant interviews was reviewed and analyzed to identify the common characteristics, both positive and negative, of the FOSS EHR market and the specific projects. Special attention was paid to identifying the benefits of the FOSS EHR model, as well as its limitations and gaps. The principals of each project reviewed these assessments for accuracy prior to the publication of this report.