

**Vendor Checklist**

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Name \_\_\_\_\_  
Practice \_\_\_\_\_

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Use this checklist to keep track of information you will hear and see during vendor product presentations and demonstrations.

Add requirements particular to your needs to the checklist.

**Key considerations in selecting EMR and office management software:**

To be effective, software must:

1. Support your practice goals.
2. Enhance your ability to care for your patients and make treatment decisions.
3. Reduce the overall effort required to manage current and future workload.

To be confident in the future:

1. The vendor's product development plan should align with your practice goals.
2. You, the customer, should have input into the product development plan.
3. The vendor must have a good reputation for meeting its published product plan.
4. The vendor must offer comprehensive training and change management support.

Always do reference checks!

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Name \_\_\_\_\_

Practice \_\_\_\_\_

Topic	C'care	Med-A	N'gale	Wolf	Comments & Notes
Look & Feel: Easy to read Fields fill "intuitively" Short Cuts Critical Data Stands Out I could follow the flow Common across "business process"					
User Interface: Hand-writing Touch Function/Hot Keys Voice Point & Click Typing <i>Providers will have to know how to type /or learn to type with this product</i>					
Integration: Appears seamless Minimum "clicks" to next task Data travels appropriately					
Data: Mostly structured Minimum of superfluous data Diagnostic coding is quick & easy Suitable for multi-disciplinary providers Minimum of text-based data					
Privacy/Security: Access permissions by type of user and business need Access permissions at data element or group as necessary Complete, unalterable, reportable audit log Data is stored encrypted Remote access over unsecured network (internet) uses 2 factor authentication (password/SSL/fob, etc)					

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Supports User Customization (move things around, add data fields, etc.)					
Interfaces:      MoH Health Registry      MoH CDM Website MoH PharmaNET              PathNET MediNET                              Hospital Lab/MI Available Today?              Cost to me the customer?					
Reports:              Majority of reporting requirements are available reports Majority of reporting requirements are not available and, <i>I see using a report writer as a benefit / as unnecessary work</i>					
Report Writer:      All data is reportable      Complex arithmetic Boolean Logic              Easy to use					
Can be installed in my office & I want to manage my own sw/hw/network Can be installed in my office & vendor offers management services ASP Installation so I wont have to manage my computing environment					
This product has special features that I would like to use in my practice.					
The sales rep understands the business of a (multi-disciplinary) medical practice					

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Topic	C'care	Med-A	N'gale	Wolf	Comments & Notes
The sales rep was able to answer <b>all</b> my questions					
Overall this product suits the size and scope of my practice.					
<b>Follow-Up</b>					
<b>Un-decided</b>					
<b>Rule-Out</b>					



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Topic	C'care	Med-A	N'gale	Wolf	Comments & Notes
Referral Management: Consolidates referral documentation Tracks referrals					
Consultation Management: Consolidates documentation Tracks (o/s) consults					
Patient Information & Education Features					
I would be confident using this product in the exam room with a patient present					
I can access my system from home or a remote location, securely					
I can securely give access to other providers in my "primary care network"					

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Topic	C'care	Med-A	N'gate	Wolf	Comments & Notes
<b>Resource Scheduling: by Providers, Rooms, Equipment, Staff</b> Flexible slots    user rules/preferences Optional views & reports					
<b>Appointment Booking: fast, efficient, searches, auto reminders, alerts</b>					
<b>Arrival/Check-in: fast, efficient, handles walk-ins, alerts</b>					
<b>Patient Registration / Review</b>					
<b>Teleplan Billing: integrated with EMR, MSP compliant</b>					
<b>3<sup>rd</sup> Party &amp; Direct Patient Billing: integrated with EMR</b>					
<b>Other Office Management Functions:</b>					
Other: Easy to use backup tools Good user manuals On-line help information Un-limited Help Desk					