These questions address issues other than product functionality, which is addressed by the Vendor Function Evaluation Matrix tool. Some of these questions may be important for you to ask early in the vendor selection process, and others may be more appropriate to ask when you are choosing between two or three vendors.

Vendor Name: _____

Date of Meeting: _____

Name of Sales Contact: _____

Questions about the company:

1. How long has your company been in business? How many employees do you have?

2. Of those employees, how many are dedicated to research of new products, sales, and ongoing support? What is the R&D budget?

3. How long has the EHR product been offered. Was it bought from another company? Was the practice management system bought from another company?

4. What were your total sales last year? Last quarter? How many sales people and trainers are assigned to this region?

5. What is your total customer base? What is your total customer base? Of those, how many are new within the last year?

6. Does the company hold regular user meetings?

7. Is your company involved now in any litigation with a customer? Has your company been fired from a job in the past three years?

Questions about the product:

1. Is your software sold modularly or does it need to be purchased as a complete package? What functions are available? Can you add functionality as the need grows?

    __ Practice Management
    __ Inter-office messaging
    __ E-prescribing
    __ Lab viewing/reporting/graphing
    __ Other

2. What operating platform does the product work on?

3. Is the product used anywhere in a multi-site implementation?

4. Will your company guarantee in the contract that the software will comply with all current and future federal and state mandates? HIPAA? Does the software have a HL7 lab interface?

Pricing questions:

1. How are the licenses issued? Concurrent user versus per practitioner?

2. What is the cost per practitioner (or concurrent user), for entire package?

3. What does the price include?

__ Software
__ Hardware
__ Training
__ Maintenance
__ Upgrades/further training/maintenance
__ Travel for your employees
__ Other

4. How much will on-going maintenance and upgrades cost?

Interface questions:

1. Can your software interface with practice management systems? Lab systems? Is there an added cost for these interfaces?

2. What existing interfaces are up and running?

3. Can I speak with a provider or administrator a clinic presently using these interfaces?

Implementation questions:

1. Will your company assume all aspects of implementation (i.e., hardware and software)?

2. Does the training occur onsite or at your facilities? Is this training included in the overall cost?

3. Are you willing to be flexible with your training methods (e.g., individual versus group training based on our needs)?

4. Is your software tailored for physician specialties (e.g., ob/gyn)? What sort of customization, if any, is needed for specialties?

5. Describe the process of transition to EHR. What are some of the difficulties? What can I expect?

6. (If interested in voice recognition) Describe how your voice activated system works. How easy or difficult is the transition? Will I need to have an "auditor" for some time after I move to voice activated notes?

7. At what point in the process does the salesperson transition to implementation specialist?

8. How often will a support person(s) be available once the system goes "live," in case of any system difficulties?

Ongoing support questions:

1. What is the frequency and depth of upgrades?

2. What is your process for enhancement requests?

3. What happens if the system fails? How do I reach you, and how accessible is your decision support?

Technical/maintenance questions:

1. What personnel and qualifications do I need to support and operate this system?

2. Does your system include any database reporting tools or special links to popular reporting products that run under Windows? Which ones?

3. Does this system work over the Internet or do I need to purchase a server?

4. Does the system require regularly scheduled (e.g., daily, monthly) down time for backups, system maintenance, etc.? Briefly explain.

5. What safeguards (e.g., fault tolerance, hardware redundancy) are included that eliminates unplanned downtime?

6. What are your data retention capabilities, if any, and recommendations for maintaining history on-line?