

Vendor Evaluation Matrix



Before evaluating vendors: Categorize each function or usability characteristic as a H (high priority), M (medium priority) and L (low priority). Think of additional functions or characteristics not covered by this tool and use the blank rows at the end of the worksheet to list these.

For each vendor: During demonstrations and interviews, make sure you get answers to high priority questions. Score each vendor on a scale from 1 (poor) to 5 (excellent) on each of your prioritized items. If a numeric result is useful to you, total up your ratings for each vendor for the high priority functions and lower priority functions to help make your comparisons.

Vendor name: _____

Demonstration date: _____

Sales contact name/e-mail: _____

Issue	Priority	Comments
Charting the visit		
Method of data entry/documentation – Forms, dropdown lists, templates, hybrid		
Are there “off-the-shelf” templates available for the conditions/ diseases that my clinic treats?		
Can templates be customized for the clinic and/or provider? Is it easy to customize them?		
When it is necessary to insert free text into the note/ template, is this easy to do?		
(If interested in voice recognition) Describe how your voice activated system works. How easy or difficult is the transition?		
Is it easy to move through the process of creating a note, and flexible if I need to go back to something, or document items in an atypical order?		
Does the system alert me about unfinished portions of the clinical documentation and can I bypass it if necessary?		

Does system support your clinic's desired method of collecting history data from patient? Possibilities include direct patient entry at kiosk, extracting data from "scannable" forms, interviewing patient.		
Is error checking on vital signs supported?		
Can I make subsequent edits and addendums to clinical documentation?		
Does the system allow me to automate referral letters, patient summaries, and other communication via e-mail, electronic faxing, etc.?		
Does the system recommend a level of care code? Does it explain its rationale?		
Customization of screen layout (ie. For MA vs. MD, MD vs. MD)?		
Prescriptions	Priority	Comments
Can I complete a prescription within a few clicks?		
Can I look up medication information and is this information useful and up to date?		
How extensive (and how sensitive) is the system's interactions checking capability, e.g., drug-drug, drug-allergy, drug-food?		
Can I refill a medication within a few clicks? Can previous sigs. be viewed from the refill screen?		
Can the system handle multiple drug formularies (insurance)?		
What is the process for eprescribing to a pharmacy?		
Lab and results management	Priority	Comments
Can I complete a lab order within a few clicks?		
Lab Interfaces – Yes or No <ul style="list-style-type: none"> • Quest • Labcorp • Other 		
Can I pull up and review lab results within a few clicks?		
Does the system notify me of abnormal lab results?		
Can the system show me trending of results over time?		



Can I create and/or customize “off-the-shelf” order sets?		
Are results received in a convenient way in the system and made visible until follow-up action is taken?		
Decision support	Priority	Comments
Does the system alert me when patient data indicates intervention is recommended, such as health maintenance, disease-specific tests, etc.		
Can I access medical literature, clinical guidelines, etc.?		
Is there evidence-based support for Rx writing, and lab ordering?		
How disruptive are alerts, are they customizable and can they be overridden?		
Patient support	Priority	Comments
Are patient education materials available and are they useful?		
What is the available patient portal functionality? (i.e. appointment scheduling, messaging, etc.)		
Is a personal health record available or can the system export to a patient health record?		
Care management	Priority	Comments
Assuming good data entry for all patients, can I query the system and identify patients that have a particular condition, are on a certain medication, etc.?		
Does the system track patients for follow-up and send out reminders?		
Can I create ad-hoc reports or am I limited to ones provided off-the-shelf? Can I customize these reports?		
Are the following queries possible?		
Identify all patients with diabetes who have not been seen in over a year.		
Notify all patients on particular medication, e.g., Vioxx.		
Find patients with a particular lab result, e.g., patients with LDL-C > 130 mg/dL.		



Questions with multiple search parameters, e.g., patients with diabetes who within the past year have had a HbA1C > 9.0%.		
What is the average HbA1C value for a particular provider's patients?		
Task management, etc.	Priority	Comments
Can I access and manage various tasks, e.g., sign progress notes, review labs, etc. within a few clicks?		
Can I task or message someone else in the practice and do it with a few clicks?		
Does system alert me of overdue tasks and urgent lab results?		
Can I manage tasks and messages from a computer other than my own?		
Company stability and reputation	Priority	Comments
How long has your company been in business?		
How many employees do you have? Of those employees, how many are dedicated to research of new products, sales, and ongoing support?		
How long has the EHR product been offered? Was it bought from another company? Was the practice management system bought from another company?		
How many sales people and trainers are assigned to this region?		
What is your total customer base? What is your total customer base in Utah? Of those, how many are new within the last year?		
Does the company hold regular user meetings?		
Can you provide references to other practices similar to ours in the area? Or can you facilitate virtual meetings with another provider (if outside our area)?		
Ability to meet implementation requirements	Priority	Comments
Integrated PMS/EHR or interface? If interface, which PM systems?		
What options do you provide for mobile and/or virtual access to the system? What level of functionality does this provide?		



Do you offer a sandbox or other means to 'test drive' your system during our evaluation and selection process?		
Can I speak with a provider or administrator of a clinic presently using these interfaces?		
Will your company assume all aspects of implementation (i.e., hardware and software)?		
What is your standard training method? Is this training included in the overall cost?		
Are you willing to be flexible with your training methods (e.g., individual versus group training based on our needs)?		
Describe the process of transition to EHR. What are some of the difficulties? What can I expect?		
At what point in the process does the salesperson transition to implementation specialist?		
How often will a support person(s) be available once the system goes "live," in case of any system difficulties?		
What is your current implementation timeline – time from contract to go-live?		
Ability to meet ongoing support needs	Priority	Comments
What is the frequency and depth of upgrades?		
What is your process for enhancement requests?		
What happens if the system fails?		
How do I reach you, and how accessible is your decision support?		
Pricing and flexibility	Priority	Comments
Can you offer an Application Service Provider (ASP) option, purchase option, or monthly subscription option?		
Is your software sold modularly or does it need to be purchased as a complete package?		
Which features/functions, modules are not standard and would be additional costs?		
Can you add modules as the need grows?		
How are the licenses issued? Concurrent user versus per practitioner?		



What is the cost per practitioner (or concurrent user) for entire package?		
What does the price include? <input type="checkbox"/> Software <input type="checkbox"/> Hardware <input type="checkbox"/> Training <input type="checkbox"/> Maintenance <input type="checkbox"/> Upgrades/further training/maintenance <input type="checkbox"/> Travel for your employees		
How much will on-going maintenance and upgrades cost?		
Other	Priority	Comments
What technology infrastructure changes will I need to make for your system?		
Are you able to connect me to the Utah Clinical Health Information Exchange (cHIE)? What is the timeline for this connection?		

Scoring: Now, review your comments and rank each category from 1 to 5, five being the best and one being the worst. Tally your score for this vendor and repeat the exercise for your top three to five vendors.

Category	Rank	Comments
Charting the Visit		
Prescriptions		
Lab and Results Management		
Decision Support		
Patient Support		
Care Management		
Task Management, etc.		
Company stability and reputation		
Ability to meet implementation requirements		
Ability to meet support needs		
Pricing and flexibility		
Other		
TOTAL SCORE		

