# 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.

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| **Vendor name:** |  |
| **Demonstration date:** |  |
| **Sales contact name/e-mail:** |  |

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| **Issue** | **Priority** | **Comments** |
| **Charting the visit** |  |  |
| 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? |  |  |
| Are drawings, free hand and on top of an image supported, and easy to access and refer back to? |  |  |
| Does the system support all of the data entry options that my clinic will need,, e.g., dictation, voice recognition, structured notes, etc.?  |  |  |
| (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? |  |  |
| 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? |  |  |
| Can I access other such clinical information as previous labs, progress notes, problem list, etc. from a patient’s “electronic chart” while charting? |  |  |
| Does the system allow me to multi-task, e.g., create task, order lab, etc. while charting? |  |  |
| 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? |  |  |
| **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? |  |  |
| Can the system send prescriptions electronically to pharmacies in my local market? |  |  |
| **Lab and results management** | **Priority** | **Comments** |
| Can I complete a lab order within a few clicks? |  |  |
| Can the system send lab orders electronically to laboratories, hospitals, etc. in my local market? |  |  |
| Can I pull up and review lab results within a few clicks? |  |  |
| Can the system receive lab results electronically from laboratories, hospitals, etc. in my local market? |  |  |
| Does the system notify me of abnormal lab results and provide normal ranges?  |  |  |
| 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? |  |  |
| Can the system facilitate letter generation for communicating results to patients?  |  |  |
| **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? |  |   |
| Is a patient portal for scheduling available or under development?  |  |  |
| Is a personal health record available or under development?  |  |  |
| **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?  |  |  |
| Does reporting module handle “and/or” queries together? |  |   |
| 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 is for a particular provider’s patients? |  |  |
| Will the system automatically submit measure-related data to CMS for the DOQ-IT program. |  |  |
| **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? |  |  |
| Is wireless networking possible? |  |  |
| Is remove connectivity possible? Are there any limitations? |  |  |
| **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? |  |  |
| What is the R&D budget? |  |  |
| How long has the EHR product been offered. Was it bought from another company? Was the practice management system bought from another company? |  |  |
| What were your total sales last year? Last quarter? |  |  |
| 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? |  |  |
| Is your company involved now in any litigation with a customer? Has your company been fired from a job in the past three years? |  |  |
| **Ability to meet implementation requirements** | **Priority** | **Comments** |
| Can your software interface with practice management systems? Lab systems? Is there an added cost for these interfaces? |  |  |
| What existing interfaces are up and running? |  |  |
| Can I speak with a provider or administrator a clinic presently using these interfaces? |  |  |
| Will your company assume all aspects of implementation (i.e., hardware and software)? |  |  |
| Does the training occur onsite or at your facilities? 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? |  |  |

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| 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? |  |  |
| What functions are available? |  |  |
| Can you add functionality 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?\_\_ Software\_\_ Hardware\_\_ Training\_\_ Maintenance \_\_ Upgrades/further training/maintenance\_\_ Travel for your employees |  |  |
| How much will on-going maintenance and upgrades cost? |  |  |
| Other | **Priority** | **Comments** |
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**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.

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| **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** |  |  |

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