



Vendor Assessment Questionnaire

As you are planning and implementing a care management program to address the needs of complex patient populations, you may wish to leverage a software solution to enable your intervention to have the greatest impact. However, there are hundreds of health management technology vendors available in the market. Selecting one vendor that is the right for what your organization needs can be a daunting task.

Using an organized, clear approach to evaluate your organization's needs and the options available can help vendor decision-making considerably. This resource lays out criteria for evaluating technology vendors and questions for consideration internally or for discussion with a vendor that will help your organization narrow the list of potential partners and ultimately make their vendor selection.

The following template can help you think through your current needs, desired features and functions, expectations, and items to follow up on. Leverage the table to track internal and external discussions, inserting your own team's notes about decisions that are made or questions that need to be raised.





Internal Assessment

Complete this table prior to assessing individual vendors.

Question or Consideration	Status	Notes and Decision Points
What key problems must this software solution solve for my organization?	<input type="checkbox"/> Confirmed <input type="checkbox"/> Discuss Internally <input type="checkbox"/> Discuss Externally	
What features are a must for my organization?	<input type="checkbox"/> Confirmed <input type="checkbox"/> Discuss Internally <input type="checkbox"/> Discuss Externally	
What features would be 'nice-to-have' for my organization?	<input type="checkbox"/> Confirmed <input type="checkbox"/> Discuss Internally <input type="checkbox"/> Discuss Externally	
Who will be the primary users of the software (e.g. nurses, office managers, care managers)?	<input type="checkbox"/> Confirmed <input type="checkbox"/> Discuss Internally <input type="checkbox"/> Discuss Externally	



Vendor Assessment

Complete this table for each software vendor under consideration.

Question or Consideration	Status	Notes and Decision Points
Do features have to be customized for our organization or are they 'turn-key' ready?	<input type="checkbox"/> Confirmed <input type="checkbox"/> Discuss Internally <input type="checkbox"/> Discuss Externally	
What features require additional costs?	<input type="checkbox"/> Confirmed <input type="checkbox"/> Discuss Internally <input type="checkbox"/> Discuss Externally	
How well does this solution interact with my organization's existing systems (e.g. EHR, billing)?	<input type="checkbox"/> Confirmed <input type="checkbox"/> Discuss Internally <input type="checkbox"/> Discuss Externally	
Are there additional costs to integrate with source systems?	<input type="checkbox"/> Confirmed <input type="checkbox"/> Discuss Internally <input type="checkbox"/> Discuss Externally	
Are there native integrations already in existence?	<input type="checkbox"/> Confirmed <input type="checkbox"/> Discuss Internally <input type="checkbox"/> Discuss Externally	
What trainings and implementation supports are provided?	<input type="checkbox"/> Confirmed <input type="checkbox"/> Discuss Internally <input type="checkbox"/> Discuss Externally	
Are trainings and additional technical support extra costs or included?	<input type="checkbox"/> Confirmed <input type="checkbox"/> Discuss Internally <input type="checkbox"/> Discuss Externally	
What maintenance supports are available?	<input type="checkbox"/> Confirmed <input type="checkbox"/> Discuss Internally <input type="checkbox"/> Discuss Externally	



<p>Are maintenance supports included in the cost or are those extra?</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Confirmed <input type="checkbox"/> Discuss Internally <input type="checkbox"/> Discuss Externally 	
<p>What report can be generated and exported out of the platform?</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Confirmed <input type="checkbox"/> Discuss Internally <input type="checkbox"/> Discuss Externally 	
<p>Are the reporting capabilities customizable to our organization?</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Confirmed <input type="checkbox"/> Discuss Internally <input type="checkbox"/> Discuss Externally 	
<p>Are customizations requests subject to additional fees?</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Confirmed <input type="checkbox"/> Discuss Internally <input type="checkbox"/> Discuss Externally 	
<p>Can the vendor demonstrate the value of the tool specifically?</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Confirmed <input type="checkbox"/> Discuss Internally <input type="checkbox"/> Discuss Externally 	

