

Comprehensive Vendor Demo Evaluation



Date:	Company:	Review By:		
		Demo'd		Comments
		Yes	No	
A. Appointments				
1. Different ways to look up patient				
2. View multiple doc schedule				
3. View last physical & Td				
4. Search open time slot/dr/day				
5. Block longer appointment time				
6. Schedule room or equipment				
7. Notify med records for chart				
8. New patient				
9. Next appointment & reschedule				
10. Walk-ins				
11. Balance due alert				
12. Recurring appointment				
13.				
14.				
15.				
B. Registration				
1. Look up patient in multiple ways				
2. Register new patient				
3. Register est. patient – change info				
a. Updates flow to EHR real time?				
4. Link insurance to encounter				
5. Family billing – multiple insurances				
6. Alert balance due				
7. Alert med staff patient is here				
8. Track patient location & time				
9. Link family members by account				
10. Minors with different addresses				
11. Set up new insurance company				
12.				
13.				
14.				
C. Patient Care – Nurse				
1. View schedule & notify pat. is here				
2. Record vitals				
3. Enter complaint & history				
4. Alert provider patient has questions				
5. Change a demographic				
6. Previous health & shot alert				
7. Handout & immunization consent				
8. Alert provider patient is ready				
9.				
10.				
11.				

	Demo'd		Comments
	Yes	No	
D. Patient Care – Provider			
1. Customize chart view by provider			
2. Review recent note & meds			
3. Move around in chart			
4. Find last labs, pap & mammogram			
5. Graph HgA1c over time			
6. How lab data is entered			
7. Compare EKGs			
8. Recent H&P, d/c summary, x-rays			
9. General search for information			
10. Show data entry via:			
a. Free text			
b. Pop-up menu			
c. Template			
d. Smart text			
e. Cut & paste			
f. Bring last note forward			
g. Pick dx for med from a list			
h. Track missing notes			
11. E-order labs and x-rays			
a. Alert staff of orders			
b. Test done & ready to review			
c. Results flagged as abnl/critical			
d. Critical labs to on-call provider			
e. Send results to MD/Pt/Refer			
f. Normal letter request			
g. Sign off on lab result			
h. Documentation of above			
12. Admit patient to hospital			
a. Generate H&P for hospital			
b. Orders for hospital			
13. Patient education handouts			
14. Template letter generation			
15. Reminders for patient visit or tests			
16. Show patient care guidelines			
17.			
18.			
19.			
E. Patient Care – Provider and Nurse			
1. Prescription refills			
a. Provider refill process			
b. Interaction checking			
c. Active problem interactions			
d. Medication formulary checking			
2. Triage calls			
a. Document call			
b. Show if/how to route to provider			
c. Last depo or tetanus shot			
d. Provide immunization list to pt.			

	Demo'd		Comments
	Yes	No	
3. Referrals			
a. Entering referrals			
b. Authorization			
c. Documentation			
d. Report of referrals			
4. X-ray			
a. Link to hospital PACS			
b. Interface with current X-ray			
5. Labs			
a. Interface to hospital lab system			
b. Interface to clinic machines			
c. Order & result to on-call provider			
6.			
7.			
8.			
F. Posting Charges & Payments			
1. Assign charges per encounter			
a. E&M bullets			
b. Pull lab charges			
c. Add collection / handling fee			
d. Diagnosis linked to CPT code			
2. Apply correct insurance to visit			
3. Encounter on HCFS & EOB			
4. Batch posting charges-visit			
5. Batch posting			
a. Post by claim number			
b. Allowed amount by insurer			
c. Check if not balanced			
6. Posting in real time			
7. Charge for office & hospital			
8.			
9.			
10.			
G. Accounts & Collections			
1. View pat. account for multiple charges			
a. View pending & paid charges			
2. Work old account			
a. Tickler file			
b. Aged report by date of xx-xx-xxxx			
3. Split account			
4. Take payment before charge is posted			
5. Amount in patient balance / ins. pending			
6. Print charges for date of service for pat.			
7. Split global OB charges			
8. Flag active vs. inactive			
9. Example of aged insurance list			
10. Generate collection letters			
11. Follow-up collection letters			
12. Statistics for outside Medicare lab			
13. Workman's comp billing			
14. Billing different than payor			

	Demo'd		Comments
	Yes	No	
15. Carve out PE/PBLM billing			
16. Split billing to two accounts			
17.			
18.			
19.			
H. Reports			
1. Pull patient list for medication recall			
2. Create customized reports			
3. Download a report to Excel			
4. Examples			
a. ID patient based on XXX			
b. Create lists based on XXX			
c. Number of appointments/MD/day			
d. Gross prod. by adj/ins/pers			
e. CPT by mo/yrdr/dr/location			
f. Pt. type by CPT, total, ins, dx			
g. Pull by provider not posting dt			
h. RVU by provider			
i. Insurance co recap by month/ytd			
j. Receipts / adj			
k. Specific CPT			
l. Track ins. contracts -allowed			
m. Active vs. inactive patients			
n. Patient by employer			
o. Print end of day / month/ year			
5.			
6.			
7.			
I. Administrative Questions			
1. Set up CPT codes			
2. Set up provider #s for different ins. co.			
3. Set up RVUs			
4. Show "block all providers from 7 – 9"			
5. Set up 2 provider schedules			
6. Set up			
a. Account type			
b. Transaction codes			
c. Patient types			
d. Insurance companies			
7. Submit electronic claims			
8. Electronic billing			
9.			
10.			
11.			
J. Security & Technology			
1. Report on daily activities			
2. Remote access to patient records			
3. Pocket PC / Palm interface			
4. Access user's manual help			
5. Show web site access			

	Demo'd		Comments
	Yes	No	
6. Securely exchange e-information			
7. Upgrade process			
8. Data backup process			
9. Chart conversion process			
10.			
11.			
12.			
K. Contracting			
1. Software escrow			
a. Element included			
b. Release event			
c. Cost			
2. Data base schema			
3. License			
a. Concurrent vs. named			
b. Perpetual vs. named			
4. Third party interfaces / data			
a. Maintained by vendor			
b. Additional costs			
c. Restrictions on licenses			
d. Supporting by vendor			
5. Warranties			
a. Vendor by litigation			
b. System meets specs			
c. RFP responses honored			
d. Services per agreement			
e. Install per implementation sched			
6. Payment linked to milestones			
7. Support			
a. SLA available			
b. Hours & types of support			
c. Named live contact			
d. Hours of live contact			
e. Severity level classification			
f. Escalation process			
g. Onsite support available			
h. Response time goals			
i. Support for previous version			
j. Number of versions supported			
8.			
9.			
10.			
L. Additional Demonstration Questions			
1.			
2.			
3.			
4.			
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7.			
8.			

