

## Reference Checking Worksheet for EHR Vendors

**Presented By:** The National Learning Consortium (NLC)

**Developed By:** Health Information Technology Research Center (HITRC)  
Iowa Foundation for Medical Care (IFMC)

**Version:** 1.0

**Date:** March 31, 2012

**Description:** This reference checking worksheet is intended to aid providers and health IT implementers in conducting vendor selection for EHR systems. It can be used prior to selecting an EHR vendor, to structure and facilitate conversations with references for vendor systems that are being considered for an EHR implementation. This worksheet includes criteria to discuss with references ranging from general questions, implementation, interfaces, training, customer support and upgrades. It includes the ability to rate each criterion on a scale of 1-5, where 1 equals very dissatisfied and 5 equals highly satisfied. The results of this activity can be used to inform the EHR vendor selection process.

**Table of Contents:** [Reference Checking for Vendor 1](#)  
[Reference Checking for Vendor 2](#)  
[Reference Checking for Vendor 3](#)

*The National Learning Consortium (NLC) is a virtual and evolving body of knowledge and tools designed to support healthcare providers and health IT professionals working towards the implementation, adoption and meaningful use of certified EHR systems.*

*The NLC represents the collective EHR implementation experiences and knowledge gained directly from the field of ONC's outreach programs (REC, Beacon, State HIE) and through the Health Information Technology Research Center (HITRC) Communities of Practice (Cops).*

*The following resource is a tool used in the field today and recommended by "boots-on-the-ground" professionals for use by others who have made the commitment to implement or upgrade to certified EHR systems.*

*The material in this document was developed by Regional Extension Center staff in the performance of technical support and EHR implementation. The information in this document is not intended to serve as legal advice nor should it substitute for legal counsel. Users are encouraged to seek additional detailed technical guidance to supplement the information contained within. The REC staff developed these materials based on the technology and law that were in place at the time this document was developed. Therefore, advances in technology and/or changes to the law subsequent to that date may not have been incorporated into this material.*

## Reference Checking for EHR Vendor #1

**Instructions:**  
 Insert the name of the vendor you are evaluating and the corresponding references you plan to contact in the appropriate fields. In speaking with references, note their responses to the open ended questions. In the second part of the tool, ask each reference to rate the vendor on a scale from 1 (very dissatisfied/ strongly disagree) to 5 (very satisfied/strongly agree) for each of the criterion. Each column will calculate a total score that can be used to help make comparisons among vendors after interviewing various references. You may insert blank rows at the end of the worksheet to ask your own questions.

[Vendor Name]	Reference 1	Reference 2	Reference 3	Reference 4
<b>Background Information (not included in score total)</b>				
1. Number of months using current system:				
2. Version of system currently using:				
3. Length of implementation (in months)				
4. Number of interfaces practice currently has installed:				
5. Estimated time to install each interface				
6. Training conducted on-site or remote?				
<b>Overview</b>				
1. The system is reliable				
2. Overall satisfaction with vendor				
3. Overall satisfaction with system				
<b>Implementation</b>				
1. Knowledge and skill of implementation staff				
2. Vendor's ability to accommodate customization requests				
3. Adherence to timeline and budget				
4. Time and effort spent developing and customizing templates was acceptable				
5. Time and effort spent preparing and customizing system was acceptable				
6. Process for managing issues during implementation				
7. Handling of post-implementation problems and their resolution				
<b>Training</b>				
1. Satisfaction with the number of hours/days of training provided				
2. Training met our needs for different audiences/user types				
3. Knowledge and skill of trainers				
<b>Customer Support</b>				
1. Availability of support staff				
2. Knowledge and skill of support staff				
3. Support after hours, on weekends, or holidays				
<b>Upgrades</b>				
1. Frequency of upgrades meets our needs				
2. Satisfied with the process for enhancement requests				
3. Upgrades have been easy to use and seamlessly integrated				
<b>Total Score (Maximum score of 95)</b>				
	0	0	0	0
<b>Additional open ended questions</b>				
1. Three things that would make system better:	<i>type responses provided here</i>			
2. Are physicians and staff using full capability of system?				
3. Lessons learned and advice:				
4. Other questions here				

## Reference Checking for EHR Vendor #2

**Instructions:**  
 Insert the name of the vendor you are evaluating and the corresponding references you plan to contact in the appropriate fields. In speaking with references, note their responses to the open ended questions. In the second part of the tool, ask each reference to rate the vendor on a scale from 1 (very dissatisfied/ strongly disagree) to 5 (very satisfied/strongly agree) for each of the criterion. Each column will calculate a total score that can be used to help make comparisons among vendors after interviewing various references. You may insert blank rows at the end of the worksheet to ask your own questions.

[Vendor Name]	Reference 1	Reference 2	Reference 3	Reference 4
<b>Background Information (not included in score total)</b>				
1. Number of months using current system:				
2. Version of system currently using:				
3. Length of implementation (in months)				
4. Number of interfaces practice currently has installed:				
5. Estimated time to install each interface				
6. Training conducted on-site or remote?				
<b>Overview</b>				
1. The system is reliable				
2. Overall satisfaction with vendor				
3. Overall satisfaction with system				
<b>Implementation</b>				
1. Knowledge and skill of implementation staff				
2. Vendor's ability to accommodate customization requests				
3. Adherence to timeline and budget				
4. Time and effort spent developing and customizing templates was acceptable				
5. Time and effort spent preparing and customizing system was acceptable				
6. Process for managing issues during implementation				
7. Handling of post-implementation problems and their resolution				
<b>Training</b>				
1. Satisfaction with the number of hours/days of training provided				
2. Training met our needs for different audiences/user types				
3. Knowledge and skill of trainers				
<b>Customer Support</b>				
1. Availability of support staff				
2. Knowledge and skill of support staff				
3. Support after hours, on weekends, or holidays				
<b>Upgrades</b>				
1. Frequency of upgrades meets our needs				
2. Satisfied with the process for enhancement requests				
3. Upgrades have been easy to use and seamlessly integrated				
<b>Total Score (Maximum score of 95)</b>				
	0	0	0	0
<b>Additional open ended questions</b>				
1. Three things that would make system better:	<i>type responses provided here</i>			
2. Are physicians and staff using full capability of system?				
3. Lessons learned and advice:				
4. Other questions here				

## Reference Checking for EHR Vendor #3

**Instructions:**  
 Insert the name of the vendor you are evaluating and the corresponding references you plan to contact in the appropriate fields. In speaking with references, note their responses to the open ended questions. In the second part of the tool, ask each reference to rate the vendor on a scale from 1 (very dissatisfied/ strongly disagree) to 5 (very satisfied/strongly agree) for each of the criterion. Each column will calculate a total score that can be used to help make comparisons among vendors after interviewing various references. You may insert blank rows at the end of the worksheet to ask your own questions.

[Vendor Name]	Reference 1	Reference 2	Reference 3	Reference 4
<b>Background Information (not included in score total)</b>				
1. Number of months using current system:				
2. Version of system currently using:				
3. Length of implementation (in months)				
4. Number of interfaces practice currently has installed:				
5. Estimated time to install each interface				
6. Training conducted on-site or remote?				
<b>Overview</b>				
1. The system is reliable				
2. Overall satisfaction with vendor				
3. Overall satisfaction with system				
<b>Implementation</b>				
1. Knowledge and skill of implementation staff				
2. Vendor's ability to accommodate customization requests				
3. Adherence to timeline and budget				
4. Time and effort spent developing and customizing templates was acceptable				
5. Time and effort spent preparing and customizing system was acceptable				
6. Process for managing issues during implementation				
7. Handling of post-implementation problems and their resolution				
<b>Training</b>				
1. Satisfaction with the number of hours/days of training provided				
2. Training met our needs for different audiences/user types				
3. Knowledge and skill of trainers				
<b>Customer Support</b>				
1. Availability of support staff				
2. Knowledge and skill of support staff				
3. Support after hours, on weekends, or holidays				
<b>Upgrades</b>				
1. Frequency of upgrades meets our needs				
2. Satisfied with the process for enhancement requests				
3. Upgrades have been easy to use and seamlessly integrated				
<b>Total Score (Maximum score of 95)</b>				
	0	0	0	0
<b>Additional open ended questions</b>				
1. Three things that would make system better:	<i>type responses provided here</i>			
2. Are physicians and staff using full capability of system?				
3. Lessons learned and advice:				
4. Other questions here				