# Vendor Evaluation Matrix Tool

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

**Developed By:** Health Information Technology Research Center (HITRC)

Vendor Selection and Management Community of Practice

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**Description:** The Vendor Evaluation Matrix tool is a general evaluation tool that rates the basic functionalities of an electronic health record (EHR) using a scale from 1 (poor) to 5 (excellent).

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*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.*

# Vendor Evaluation Matrix

**Instructions**: Score each vendor on a scale from 1 (poor) to 5 (excellent) on each of your prioritized items. Total up your ratings for each vendor to help make your comparisons. Write the names of the vendors you are comparing in the watermark space provided in vendor columns. Use the blank rows at the end of the worksheet to ask your own questions.

| Functionality/Usability | Priority | Vendor A | Vendor B | Vendor C |
|---|---|---|---|---|
| **Charting** | | | | |
| Can the system accommodate (and potentially improve) my workflow? | | | | |
| Can I easily build and/or customize "off-the-shelf" templates? | | | | |
| Does the system offer a variety of data entry options, e.g., dictation, voice recognition, structured notes, etc.? | | | | |
| Can I make subsequent edits and addendums to clinical documentation? | | | | |
| 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, 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 the system allow me to forward patient information to staff, other physicians, etc. via e-mail, electronic faxing, messaging, etc.? | | | | |
| Does the system ensure that only authorized clinicians can sign clinical documentation? | | | | |
| **Prescriptions** | | | | |

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|---|---|---|---|---|
| Can I complete a prescription within a few clicks? | | | | |
| Can I look up medication information and is this information valuable? | | | | |
| How extensive (and how sensitive) is the system's interactions checking capability, e.g., drug-drug, drug-allergy, drug-food? | | | | |
| How accurate is the system in identifying drug-condition warnings, e.g., pregnancy? | | | | |
| 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** | | | | |
| 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? | | | | |
| **Decision Support** | | | | |
| Does the system utilize clinical information from all parts of the chart to provide decision support? | | | | |
| Does the system alert me when patient data indicates intervention is recommended? | | | | |

| | | | | |
|---|---|---|---|---|
| Can I access medical literature, clinical guidelines, etc.? | | | | |
| **Disease and Population Management** | | | | |
| 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? | | | | |
| **Health Record Management** | | | | |
| Can I look up a patient by a number of different criteria, e.g., name, MRN, SSN, etc.? | | | | |
| Does the system provide a summary view of a patient's health status? | | | | |
| Does the system handle other such clinical documents as x-rays, reports, etc.? | | | | |
| Does the system allow me to maintain patient lists, e.g., problems, allergies, medications, etc.? | | | | |
| Can I organize patient information within the system in a similar way to my paper charts? | | | | |
| **Clinical Tasking & Messaging** | | | | |
| 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? | | | | |
| How disruptive are the alerts, are they customizable and can they be overridden? | | | | |
| Can I manage tasks and messages from a computer other than my own? | | | | |
| **Financial considerations** | | | | |

| | | | | |
|---|---|---|---|---|
| Roughly how much could the system cost my clinic? | | | | |
| Can you offer an Application Service Provider (ASP) option, purchase option, or monthly subscription option? | | | | |
| Roughly how much do the software licenses cost? | | | | |
| About how much will on-going maintenance and upgrades cost? | | | | |
| How often will a support person(s) be available once the system goes "LIVE" in case of any system difficulty? | | | | |
| How are the licenses issued? Concurrent user versus per practitioner? | | | | |
| **TOTAL SCORE** | | | | |