

**General**

- Main contact at company
- Year company was established
- Years in business as EHR vendor
- Company privately held or publicly traded
- Background of executive team
  - Did they start company
  - How long have they been with company
- Background of founders
  - Still with company or build/sell
- Long term goals for product
- Long term goals of company
- Total number of employees directly associated with EHR product
- Number of employees dedicated to implementation (e.g., project management, system installation, etc.)
- Number of employees dedicated to training
- Number of employees dedicated to customer support
- Annual sales
- Annual revenue
- Number of systems sold annually
- Number of systems implemented annually
- Total number of implementations to date (including each year for last two years)
- Size of existing user base (physicians and staff)
- Number of physicians currently using system
- Geographical distribution of customers
- Number of similar customers by size, specialty, etc.

**Product**

- Frequency and depth of upgrades
- Process for enhancement requests
- Frequency of service packs, patches, etc.
- Existing interfaces/integration with practice management systems and/or billing systems
- Existing interface with lab vendors (e.g., LabCorp, Quest, etc.)
- Existing interface with transcription vendors
- Existing interface with local hospitals
- Product Surescripts/RxHub certified
- Product certified HIPAA compliant by third party
- Product compliant with Consolidated Health Informatics (CHI) standards for interoperability (e.g., ICD, CPT, LOINC, NDC, SNOMED, etc.)

## **Implementation**

- Average length of implementation
- Implementation resources company will provide
- Implementation resources practice will require
- Days on site for implementation and customization
- Days on site for training
- Days on site for workflow and template design
- Test/training system or environment provided

## **Customer Support**

- Normal customer support hours (note time zone)
- Support available after hours, weekends, and holidays
- Local support available
- Different levels of support provided
- Process for resolving software problems
- User group meetings held and, if so, how often
- Regional support groups available
- Discussion forum available to share ideas and solutions
- User and technical documentation provided