SUGGESTED QUESTIONS FOR SOFTWARE VENDORS WHO SELL ELECTRONIC HEALTH RECORDS, PRACTICE MANAGEMENT SYSTEM, AND OTHER SOFTWARE

1. What is the history of your company? We are looking for experience and stability.

2. Are you the company that creates the software or a "reseller" that represents the vendor that creates the software?

3. What are your company's plans for growth and change within the next 5 years? Are there any mergers or acquisitions on the horizon? We want to avoid signing with a vendor that is likely to merge with another within the foreseeable future.

4. If your company has experienced corporate changes (e.g. mergers, acquisitions, etc.) within the past two years, how have those changes affected your business?

5. What distinguishes your company, your products, and your services from that of your competitors?

6. Has your company received KLAS or any other special recognition for your services and products?

7. What is your company's experience with psychiatry practices and practices that include psychiatry, psychology, social work, etc.?

8. What is your company's experience in working with psychiatry practices that are organized and operate in a way similar to ours (clinical organization, billing set-up, staff responsibilities, in/out-of-network with insurance)?

9. What is the full list of products and services that you provide? (e.g. practice management system, EHR, patient portal, billing and collections, IT support, revenue cycle management, other). Not all vendors offer the same services. If a practice purchases software from different vendors, it's essential that the systems are integrated with each other. Integration is not the same as interface; interface is the less efficient of the two.

10. Some vendors require that providers buy a complete package that includes E H R, practice management, and sometimes billing and collections. Does your company require that a practice buy a complete package or are various functions available on an a la carte basis?

11. Do you have existing relationships with particular labs, etc? Is there an additional charge for adding labs with which you do not currently have relationships?

12. Does your E H R integrate with North Carolina Health Information Exchange? Is there a cost?

13. Do you offer both cloud-based and on-site server options?

14. If a practice is shifting from other software to yours, what is the process for making the transition?

    a. Tell me about your company's experience in transitioning from (Vendor X) to your system.

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15. Eligibility for Medicare and Medicaid incentive programs requires use of 2015 Certified Electronic Health Record Technology (CEHRT). Do you currently meet this requirement?

16. How has your company assisted clients with MACRA, MIPS, and other quality incentive programs? Based on your experience to date, do you plan to make any changes in the ways in which you provide assistance?

    a.   Does your system integrate with the APA PsychPro registry?

17. North Carolina is in the process of privatizing Medicaid. How will you assist your clients in in making the transition?

18. How do you price your products: initial cost (if any), implementation, customization of templates, upgrades, integration of various devices (e.g. computer, tablet, phone)?

19. During what hours is technical support available? Is the support free to the entire practice or limited to a particular number of users?

20. Do you offer both on-line and on-site training? Is there a cost to each?

21. If we were to select your company, what would be the steps steps in the implementation process?

22. Once an agreement has been signed, what is the current wait time for implementation?

23. How do you assign responsibilities for clients within your company?

24. Do you recommend that our practice designate a "superuser" to help us implement your software?

25. Not all relationships with clients work smoothly. Tell us about some of the client relationships that have worked well and about some that have not worked well. For those that have not worked well, what have learned from those experiences?

26. What happens if we decide that this is not the right product for us after all? How long is the commitment and what are the terms for getting out of the contract if needed?

27. Is it possible for us to have access to the software to test out prior to making the purchase? Or is it possible to have a pilot trial with one or two providers before we go to full implementation?

28. From your perspective, what can a practice do to make implementation go well?

29. Please provide the names of three references that we can call and/or visit. We would like to speak with (Describe practice—solo, group, in or out-of network, psychiatry only, psychiatry plus other professionals) preferably in North Carolina.

30. Do you pay practices for providing a reference for your company?