

PM System Selection Project
Practice Management Reference Call Form

<p><u>Product Name :</u></p> <p><u>Reference Site Name:</u></p> <p><u>Person(s) spoken to and titles):</u></p> <p><u>Name(s) of callers:</u></p> <p><u>Date of call:</u></p>
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1. Installation and Training

- a. On a scale of 1 to 5 (1- strongly disagree, 5 – Strongly agree), please answer the following questions:

Question	Score
Rate the expertise and helpfulness of the vendor installation staff	
The implementation was well organized with few surprises	
Goals and milestones were met in a timely way	
Rate the expertise and helpfulness of the vendor training staff	
Rate the effectiveness of the training	

- b. What went well during the implementation and training process?

- c. What could have been improved about the implementation and training process?

- d. If you could do it over, what would you do differently?



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- e. What advice would you give other office staff learning to use this system?

- f. Do you attend the vendors User Group? Are the meetings helpful?

- g. Do you access an online customer forum or listserv? Is this helpful?

2. Functionality and Usability

- a. On a scale of 1 to 5 (1- strongly dissatisfied, 5 – Strongly satisfied), please answer the following questions:

Question	Score
Rate your satisfaction with patient scheduling	
Rate your satisfaction with patient recall functions	
Rate your satisfaction with appointment letters and reminders	
Rate your satisfaction with on-line insurance eligibility checking	
How easy is it to access patient information ?	
Rate your satisfaction with patient registration.	
Rate your satisfaction with document scanning features	
Rate your satisfaction with referral management	
Rate your satisfaction with MSP questionnaire functionality	
Rate your satisfaction with the reports you use	
Rate your satisfaction with the office messaging functionality	

- b. If you could change anything about the system, what would it be?

- c. Have you used the system to help with process improvement projects, e.g. tracking wait times?
How well has this worked?



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d. What do you like best about the system?

Other comments:

