

EHR/PM Selection Project  
IT Reference Call Form

<u>Product Name:</u>
<u>Reference Site Name:</u>
<u>Person(s) spoken to and titles):</u>
<u>Name(s) of persons making call</u>
<u>Date of call:</u>

**1. Product/Version**

- a. Version of product currently installed:
- b. How long have you been live on the product:
- c. How long have you been live on the current version?

**2. Sales and Contracting**

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

Question	Score
The product lived up to promises made during the sales process	
The vendor was flexible during the contracting process	
I would buy this product again	

**3. Installation and Training**

- a. What was the elapsed time between contract signing and project kick-off?
- b. What was the elapsed time between kick-off and go-live?
- c. Did you use a phased implementation approach (if so, describe)?
- d. Did you convert data from an existing system? (if so, which one)?
- e. Do you have interfaces to external systems? (if so, which ones)?
- f. 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	

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Question	Score
Rate the expertise and helpfulness of the vendor training staff	
Rate the effectiveness of the training	
The hardware configuration proposed by the vendor was complete and adequate to support the processing load of the system	
The conversion process was smooth and data was converted accurately	
The vendor delivered working interfaces on time	

- a. What went well during the implementation process?
- b. What could have been improved during the implementation process?
- c. If you could do it over, what would you do differently?

**4. Support, upgrades and enhancements.**

- 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 support staff	
The support staff returns calls within the agreed upon timeframe	
The support staff resolves issues within the agreed upon timeframe	
The support staff listen to and understand my issues	
When support staff resolve an issue the problem is fixed	
“Fixes” to problems do not cause other problems to occur.	
Product upgrades are delivered in a timely manner	
The process of installing product upgrades is problem free	
Product upgrades work well when installed	
The vendor notifies me and receives permission before making changes to the production environment	
The vendor delivers requested customization or enhancements in a timely way	
The customization or enhancement works as specified	

- b. Do you have any issues or concerns regarding support (if so, what)?
- c. Do you have an escalation path for support issues? Have you needed to use it? Was it helpful?
- d. Do you attend the vendors User Group? Are the meetings helpful?
- e. Do you access an online customer forum or listserv? Is this helpful?

**5. Security and User Administration**

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

Question	Score
It is easy to add and delete users	

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Question	Score
It is easy to change user access and privileges	
The system audit logs are easy to run and interpret	
The system can be set up to force password changes at preset times	
The system forces a minimum password length	

**6. Current Operations**

- a. Is system response time adequate?
- b. Do your users have remote access to the system, e.g. from home? Any response time or support issues?
- c. Do you run the system over data communication lines to geographically distant locations? Any response time issues?
- d. Have you added processing hardware capacity since the system was first installed?
- e. What is your biggest user support headache with this system?
- f. If you could change anything about the system, what would it be?