Patient Engagement
VENDOR CHECKLIST

Find a patient engagement vendor who can offer expertise, flexibility, integration, and long-term support and training—this checklist can help.

☐ ## COMPREHENSIVE, SINGLE PLATFORM

Can this vendor help you engage patients at every major touchpoint of the patient journey? Can they also accommodate multiple locations and multiple specialties on one platform?

☐ ## INTEGRATION

Can this vendor integrate with your scheduling, EHR, or practice management system? Is patient data easily accessible so staff can respond appropriately?
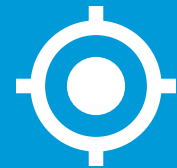
☐ ## DIGITAL PATIENT EXPERIENCE

Does this vendor offer solutions that empower patients with self-service tools in order to schedule appointments, chat with clinic staff, register and check-in, and pay their bills? Can these self-service tools be completed from a mobile device without a username or password?

☐ ## MULTI-MODALITY: TEXT, EMAIL, VOICE

Text messages have a 98% open rate, which makes them the best communication method, but not the only one. Patients still utilize voice and email, so a truly best-practice strategy incorporates all three.

☐ ## APPOINTMENT CONFIRMATION

Does this vendor offer patients the option to confirm, cancel, or reschedule their appointments from the appointment reminder? Is it intuitive and easy?

☐ ## NO-SHOWS REENGAGEMENT

Does this vendor automate outreach when a patient no-shows for an appointment? This is crucial to keeping patients current in their care and preventing outmigration to another source of care

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☐ **UNLIMITED MESSAGING / FLAT COST**

Does this vendor offer unlimited messaging, regardless of modality? Unlimited messaging encourages the use of best practices and prevents a spike in no-shows towards the end of the billing cycle.

☐ **TCPA, HIPAA, AND PRIVACY COMPLIANCE**

Are patient privacy laws and regulations incorporated into the patient messaging platform to ensure compliance?

☐ **HANDS-ON IMPLEMENTATION RESOURCES**

How does this vendor equip their customers for successful go-live projects? Does the team include technical experts, project management, and training?
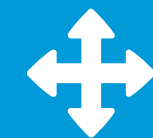
☐ **CUSTOMER SERVICE EXCELLENCE**

How accessible will this vendor be after go-live? Does the support process offer access to live technical experts? Can this vendor offer references and case studies to validate the value and service they provide their customers?

☐ **FLEXIBILITY**

Is this vendor willing to work with me long-term, to add capabilities as my priorities and budget allow? How will be able to adapt when I make changes to my other systems, add or change my setup, etc.?