

Patient Management Vendor Comparison Tool

Program Goals	
What are our primary objectives ? (e.g., improve adherence, reduce hospital readmissions, expand specialty programs)	
What patient populations/disease states do we serve or intend to serve?	
What specialty pharmacy accreditations are being pursued?	

Current Program Overview	
Approximate number of patients managed annually?	
Number of disease-state programs concurrently?	
What clinical outcomes are most important?	
What workflows are already in place that must be supported or replaced?	

Program Size and Disease States			
	Vendor 1	Vendor 2	Vendor 3
What patient volume can the platform support?			
Does the vendor specialize in certain disease states?			
Are templates available for common therapy areas? (e.g., oncology, MS, Hepatitis C)			
Can the system scale with growth ?			
Limits per subscription tier			
Disease-state modules included			
Plans for future expansion			

IT Onboarding, Integration, and Security			
	Vendor 1	Vendor 2	Vendor 3
What is the average onboarding timeline ?			
Is there an API for data exchange?			
Can this integrate bi-directionally with our EHR/EMR ?			
How are data migrations handled?			
What security controls are in place? (HIPAA, encryption, segmentation)			
IT onboarding checklist or needs			
EHR integration requirements			
Security certification documentation			

Cost and Contract Terms			
	Vendor 1	Vendor 2	Vendor 3
What are the total costs ? (licensing, onboarding services, training, integrations)			
Is pricing based on per patient, per user, flat fee, or module-based ?			
What is the term length? Renewal terms?			
Are discounts available for multi-year or bundled services?			
Are there certain privileges that are limited to a certain number of users?			
Price escalation terms			
Cancellation policy			

Maintenance, Support, and Customer Service			
	Vendor 1	Vendor 2	Vendor 3
What support is included? (phone, email, portal)			
Are dedicated support reps available?			
What are response and resolution times ?			
Is training included? How frequent and at what cost?			
Support hours			
SLAs for support			
Dedicated onboarding specialist			
Ongoing training availability			

Usability and Workflow Support			
	Vendor 1	Vendor 2	Vendor 3
How intuitive is the user interface and experience?			
Can users accomplish core tasks in fewer steps?			
Are role-based dashboards available?			
Is the system accessible via mobile?			
Request demos with your end users			

Customizability			
	Vendor 1	Vendor 2	Vendor 3
Can forms, alerts, and workflows be customized?			
Can clinical paths be tailored for our therapies?			
Can the vendor configure intake workflows?			
Conditional logic in patient outreach?			

Conditional task automation?			
------------------------------	--	--	--

EHR Integration			
	Vendor 1	Vendor 2	Vendor 3
Does it integrate with major EHRs (Epic, Cerner, etc.)?			
Does the vendor support bi-directional data exchange ?			
How are clinical notes synchronized?			
Ask for sandbox EHR proof-of-concept			
List supported connectors			

Accreditation Support			
	Vendor 1	Vendor 2	Vendor 3
Are accreditation workflows pre-built ?			
Does the vendor provide templates for policies, procedures, and documentation ?			
Can it produce audit-ready reports ?			
Has the vendor successfully supported other pharmacies through URAC/ACHC?			
Accreditation support library			
Accreditation checklists built-in			
References from accredited customers			

Patient Engagement & Messaging			
	Vendor 1	Vendor 2	Vendor 3
What messaging options are supported? (SMS, voice, email, portal)			
Are templates available by disease state?			
Does it support two-way messaging?			
Can automated reminders be configured?			
Message delivery & read rates tracking			
Patient preference capture			

Reporting & Analytics			
	Vendor 1	Vendor 2	Vendor 3
What reports are available out of the box?			
Can you build custom reports ?			
Can the system export data to BI tools?			
What outcome metrics are tracked by default?			
Adherence rates			
Clinical outcomes			
Outreach performance			
Accreditation metric reporting			

Developed by Workgroup Members:

Olivia Crabtree, PharmD, MBA, MHA

Bernice Man, PharmD, BCPS, CPHQ, CSP

Chelsea Maier, PharmD, CSP, DPLA