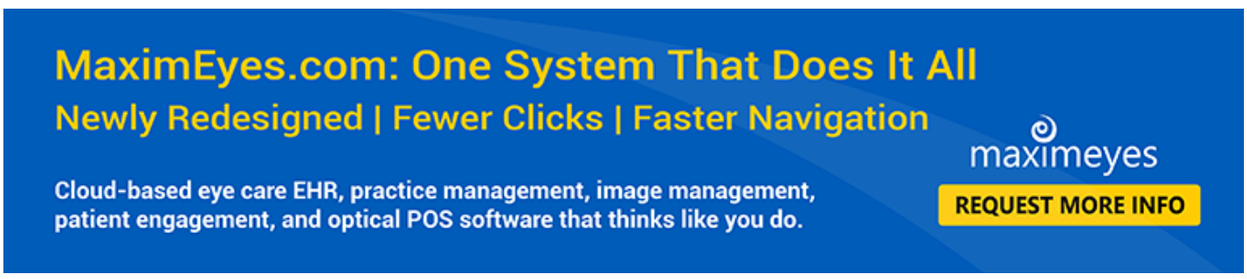
40 Questions to Ask an Eye Care Software Vendor

If you are in the market for new eye care software, there are several factors you may want to consider in addition to software features and price. We recommend asking the companies you evaluate about data security, training, customer service, and any termination or "out clause" should you need to leave that vendor.

With the above in mind, MaximEyes by First Insight has compiled a list of questions that optometrists and ophthalmologists have asked us over the years. We hope at least some of these questions will help you compare software vendors and products as you search for a long-term EHR and practice management software solutions partner.

No.	Question	Category
1	What can I customize (on my own) in your EHR (forms, data points, letters, value lists, etc.)?	Customization
2	Does your EHR allow me to duplicate data fields so they can be viewed in multiple areas or screens during the encounter?	Customization
3	Does your EHR allow me to create a one-page exam form?	Customization
4	What parts of the practice management system (outside the EHR) can be customized?	Customization
5	Does the system have customizable reports?	Customization
6	Does your EHR automatically trigger or suggest diagnostic and procedure codes based on my exam findings?	EHR
7	Does your EHR allow me to FREE TEXT type in any fields I want to?	EHR
8	Can two users enter data in the EHR at the same time? If so, what are any limitations?	EHR
9	Does your EHR have a built-in chat tool to communicate with staff?	EHR
10	Are there extra fees for diagnostic equipment integrations? If so, what are they?	EHR
11	Does the system allow for check-in and check-out of patients and tracking patients through the office?	Patient Check-in
12	Does your EHR include a secure patient portal? If so, is there an add-on fee?	Patient Engagement
13	Does your EHR allow patients to complete an online intake (check-in) form using any device (home computer, mobile phone, etc.)? If so, is there an add-on fee for this feature?	Patient Engagement
14	Does your software include built-in text/email reminders, online scheduling, recalls, and more for patients (not via a third-party vendor)? If there is an extra fee for this, what is that fee?	Patient Engagement
15	Does your scheduler offer a weekly view of appointments?	Scheduler
16	Does your practice management software include online scheduling for patients? If there is an extra fee for online scheduling, what is that fee?	Scheduler
17	Does your scheduler include a waitlist feature?	Scheduler
18	Does the practice management part of the system allow electronic ordering for contact lenses? If so, what distributors or suppliers?	Optical
19	Does your system have a quick way to see which optical jobs and bills or claims are outstanding/overdue?	Optical
20	Does your software integrate directly with VSP? If so, what does the integration do?	Insurance
21	Is there the ability to set up benefit plans to calculate patient copays and coinsurance? How easy is it to set up? How does this work with eligibility and authorizations for vision or medical insurance?	Insurance
22	How many eye doctors use your software in the United States?	Company

No.	Question	Category
23	How long has your company offered software solutions to eye doctors?	Company
24	How many full-time employees work for your company?	Company
25	How large is your software development team (number of full-time employees at your company)?	Company
26	What training resources do you provide (built-in learning center, videos, documentation, online instruction, etc.) as part of your basic package? And do you offer personalized onsite training as an added package?	Training
27	What does a typical implementation process look like? How long do offices like mine take from the purchase date to the GO LIVE date on your system?	Training
28	Do you assign a single coordinator or trainer to a new customer for phone and email communication or questions?	Training
29	What initial software setup is required in the system for an office like mine, and how many hours should we set aside for this?	Training
30	What is your typical response time for support assistance?	Customer Support
31	What are your customer support days and hours?	Customer Support
32	Does your software run in a browser, OR is it connected to the cloud via some sort of remote desktop software instead?	Performance
33	Does your software allow me to run split screens to view and enter data in the scheduler and EHR, for instance, in the same window?	Performance
34	If I needed to restore data from any point in time, how far back (# days) could I go to restore it with your system?	Data Security
35	How long are daily and weekly backups of my data stored?	Data Security
36	Is your price based on the number of doctors, locations, users, workstations, or combinations?	Pricing
37	What modules or features are NOT included in the standard package for your software, and what is the price for **each** add-on option?	Pricing
38	What are your termination or “out clause” terms should I wish to stop using your software?	Termination
39	What data can I get from your system in a format (not PDF) that can be converted by another vendor directly into a different EHR should I leave your system?	Termination
40	How much, if anything, will your company charge me to get my data upon termination in a convertible format?	Termination



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