Healthcare Communications
Evaluation Checklist

Use the same requirements with each provider. Check an item only after you have evidence, a named owner and an agreed next step.

Practice / locations: _____ **Date:** _____

Provider / reviewer: _____

☐ **1. Map patient call routes**

Document day, night, holiday, urgent and overflow routes. Identify missed-call problems and escalation owners. Test a representative patient call.

☐ **2. Count users and workflows**

List seats, concurrent agents, direct numbers, queues and clinic locations. Confirm transfers, callbacks, supervisor tools and recording needs.

☐ **3. Verify EHR integrations**

Confirm exact software versions, connector scope, data fields, licenses and access permissions. Name the implementation and maintenance owner.

☐ **4. Review safeguards and agreements**

Map where patient information is created, stored or transmitted. Have qualified teams review access, retention, logging and required vendor agreements.

Evidence / open questions: _____

_____

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☐ **5. Test AI and human handoffs**

Try routine questions, unclear requests and urgent-call scenarios. Confirm staff fallback, accuracy review and ownership of assistant updates.

☐ **6. Validate outage recovery**

Test backup internet, power and alternate call routing. Record recovery expectations, monitoring responsibility and how staff continue working.

☐ **7. Compare full costs and migration**

Include licenses, connectors, equipment, installation, number ports, training, support and exit terms. Agree on cutover testing and rollback ownership.

☐ **8. Choose and assign accountability**

Run the same scenarios with every provider. Record remaining tradeoffs, acceptance criteria, project dates and the person responsible after go-live.

Decision / next action: _____

Owner: _____ **Target date:** _____

Need help comparing your options?
Call USA Communications: **817-608-7319**
Schedule a free technology assessment

Consultation: www.usacommunications.us/schedule-a-meeting/
Planning worksheet. Each supplier's scope must be verified in writing. This checklist does not certify HIPAA compliance or replace your privacy, security or legal review.