Checklist

Transitioning To Online Forms

☐ **What problems can we solve with online forms?**

First, and foremost, determine what issues you are most trying to address. Get as much organizational feedback and buy-in as possible, from as many stake-holders as possible, to be sure you have the correct solution. Is it schedule adherence, patient or staff satisfaction through ease of submission, entry accuracy, or even safety through reduced-contact patient intake, etc? Not every vendor addresses these issues equally, and few do them all, or do them all well.

☐ **What forms do we need to put online?**

Inventory your forms and pages for each. Many online vendors use the form or page count to establish pricing (and hide hidden fees and up-charges).

☐ **Who will convert the forms?**

Ascertain if you have the time and resources to create your own forms. They cost money to create one way or another and it is often a better value choice to go to a full-service vendor that will convert and maintain your forms for you.

☐ **Which vendor will best fit our needs?**

Once you have seen the demos and gathered your options and pricing, evaluate the online form vendors and pick the one that gives you the best value for solving your issues now and for your planned needs in the future.

☐ **What do we need in a vendor contract?**

Know what you are signing, for how long, and what protections you have (guaranteed uptime and success, how long is your data kept, what happens if you cancel the contract, etc). Make sure in the contracting process you get a free trial or better, an opt out period if it's not a monthly contract. Unfortunately, free trials sound great, but they often lead to implementation issues as neither side is fully motivated to drive change and ultimately you never get started seeing the benefits of the product.