



Checklist:

As independent healthcare practices increasingly rely on digital communications, choosing the right unified communication platform has become critical. Such a solution doesn't just streamline phone calls, secure texts, faxes, and video calls. It directly improves your operational efficiency, reduces clinician burnout, and enhances patient satisfaction.

Follow this comprehensive checklist to confidently evaluate vendors, ensure robust HIPAA compliance, and seamlessly implement a communication solution that delivers secure, efficient, and patient-centric care.

1

Vendor Evaluation Criteria

When considering a unified communication solution, ensure the vendor meets these essential criteria:

User Experience & Adoption

- ☐ **Intuitive Interface:** Easy-to-use design requiring minimal training & fast staff adoption.
- ☐ **Unified Platform:** Single solution for voice, text, fax, video - eliminating frustration from juggling multiple apps.
- ☐ **Customizable Templates:** Quick-reply templates simplify everyday tasks like appointment reminders & follow-up messages.
- ☐ **Mobile Accessibility:** Robust mobile access for efficient patient communication from any location.

Patient Experience Benefits

- ☐ **Automated Appointment Reminders:** Reduce no-shows significantly (typically 15-25%) by offering patients timely, convenient notifications.
- ☐ **Integrated Telehealth:** Easy-to-use virtual visits that seamlessly integrate into your existing scheduling and EHR workflow.
- ☐ **Efficient Call Routing:** Smart routing connects patients quickly to the right staff member, reducing hold times and frustration.
- ☐ **Secure Patient Messaging:** Offer secure, HIPAA-compliant texting for enhanced patient-provider communication and satisfaction.

Integration Capabilities

- ☐ **Native Integration:** Connect seamlessly with your existing EHR system (Epic, NextGen, athenahealth, eClinicalWorks).
- ☐ **Seamless Connectivity:** Link effortlessly with your Practice Management, Billing/RCM, Telehealth, and Patient Portal tools.
- ☐ **Essential Tools:** Integrate smoothly with critical platforms, including Billing/RCM, Telehealth, and Patient Portals.
- ☐ **Open APIs:** Utilize open APIs and interoperability standards (HL7/FHIR support) for flexibility as your practice expands.

Transparent Pricing & Cost Structure

- ☐ **Clear Pricing:** Offer straightforward monthly per-user pricing without hidden fees.
- ☐ **Cost Transparency:** Provide details on setup, integration, training, upgrades, and ongoing support costs.
- ☐ **Flexible Scalability:** Clearly outline scalability options to avoid unexpected future costs.
- ☐ **Total Ownership:** Present the total cost of ownership (TCO) clearly for a 3–5 year period.

Reliability & Uptime

- ☐ **Guaranteed Uptime:** Deliver a minimum uptime guarantee of 99.9% (ideally 99.99%).
- ☐ **Robust Backup:** Maintain robust backup systems, redundancy, and clearly defined disaster recovery plans.
- ☐ **Proactive Monitoring:** Conduct real-time monitoring with proactive notifications about system status and performance.

HIPAA Compliance & Security

- ☐ **Signed BAA:** Ensure a comprehensive Business Associate Agreement (BAA) covers all communication features.
- ☐ **Strong Encryption:** Maintain AES-256 encryption for all data in transit and at rest.
- ☐ **Secure Authentication:** Use multi-factor authentication (MFA) and role-based access controls.
- ☐ **Detailed Auditing:** Keep comprehensive audit trails and documented incident response and breach notification processes.

Support & Implementation

- ☐ **Clear Timeline:** Define an implementation timeline (ideally 1–3 months) tailored for small practices.
- ☐ **Dedicated Onboarding:** Provide customized onboarding and staff training designed for healthcare-specific workflows.
- ☐ **Responsive Support:** Ensure accessible, knowledgeable 24/7 support with guaranteed response times for urgent issues.
- ☐ **Continuous Optimization:** Offer continuous support & system optimization after launch.

2

Essential Questions to Ask Vendors

Use these targeted questions to vet each vendor thoroughly:

User Experience & Adoption

- ☐ "How easy is your system for clinicians and front-desk staff to learn and use?"
- ☐ "Do you provide role-specific training and resources to ensure smooth adoption?"

Patient Experience Benefits

- ☐ "How does your platform improve patient satisfaction through secure messaging, reminders, and telehealth?"
- ☐ "Can patients easily manage appointments and communicate securely using your integrated system?"

Customer Support & Data Migration

- ☐ "What support channels (phone, chat, email) do you offer, and what are your guaranteed response times?"
- ☐ "How securely and efficiently will you handle migration of our existing data & phone numbers?"

HIPAA Compliance & Security

- ☐ "Can you provide documentation validating HIPAA compliance and data security measures?"
- ☐ "What are your procedures for data breaches, and how quickly do you notify practices?"

Implementation & Integration

- ☐ "Can you provide a clear, detailed breakdown of all costs, including implementation, monthly subscriptions, training, and ongoing support?"
- ☐ "Are there hidden costs or extra fees for essential features like secure fax, texting, or integrations?"

Contract & Data Portability

- ☐ "What are your standard contract terms, and are there penalties for early termination?"
- ☐ "How easily can we access and export our data if we decide to switch to another platform?"

3

Healthcare Integration Requirements

Ensure the chosen platform integrates with these essential categories to maximize workflow efficiency:

Integration Category	Why It Matters
Electronic Health Records	Centralizes clinical records & streamlines documentation.
Practice Management & Scheduling	Automates scheduling and reduces no-shows.
Billing & Revenue Cycle	Enhances billing accuracy & speeds payment processing.
Patient Portal & Engagement	Improves patient experience & reduces admin workload.
Telehealth & Virtual Care	Expands patient access with integrated virtual visits.
Insurance Verification	Reduces claim errors & streamlines patient intake.
Lab & Diagnostic Systems	Enables fast results reporting & clinical decision-making.
Accounting & Financial Management	Simplifies financial oversight & integrates reporting.

4

Best Practices & Common Pitfalls

Best Practices

- ☐ Engage key stakeholders early for better buy-in and smoother adoption.
- ☐ Conduct phased rollouts starting with smaller teams.
- ☐ Regularly measure performance and communicate improvements.

Pitfalls to Avoid

- ☐ Underestimating training requirements and timelines.
- ☐ Missing hidden costs during vendor evaluation.
- ☐ Neglecting thorough data migration planning and testing.
- ☐ Choosing overly complex solutions that don't match the practice size and resources.

5

Measuring Success & ROI

After implementation, regularly track:

- ☐ Reduced administrative overhead
(Target: 15–30% reduction)
- ☐ Improved patient satisfaction
(Target: 20–30% increase)
- ☐ Lower no-show rates
(Goal: 15–25% reduction)
- ☐ Reduced clinician burnout
(Target levels below 13.5%)
- ☐ Financial savings from platform consolidation
(Typical cost savings: 30–50%)

6

Implementation Timeline (Sample)

Use this typical implementation timeline as a benchmark for your project:

- ☐ **Weeks 1–2:** Kickoff meeting, clarify expectations, audit current systems, define goals.
- ☐ **Weeks 3–6:** Port phone numbers, set up auto-attendants, configure call routing, and initial system testing.
- ☐ **Weeks 7–10:** Staff training, finalize security audits, ensure user readiness and compliance checks.
- ☐ **Weeks 11–12:** Official platform launch, closely monitor performance, fine-tune integrations, and celebrate initial successes.



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