**Must-Have List (not in order of importance) and Second Round Demo Questions/Evaluation**

**User Interface, Patient Setup**

1. **Easy to omit/hide** **features that we won’t use (e.g. Billing section).**
2. **Easy to add a new patient.**
3. **Easy to create and edit our own unique forms** (Medical History, Consent, Good Faith Medical Review, etc.) without knowing a programing language**.**
   * 1. Supports Prior Exam process, once paperwork is completed and returned electronically by patient, a video appointment can be set up with a medical provider for review with patient before treatment.
   1. **Sending and receiving documents, mobile-optimized design**
      1. Ability for patient to complete forms on mobile phones.
      2. Ability to text/email using temporary/disappearing links (We won’t be using Patient Portal, requiring patients to set up w/LI and PW).
      3. Reminder to complete forms, email/text available options.
      4. We are alerted when forms are completed.
      5. Once completed and returned electronically the forms auto populate the patient’s file as needed.
4. **Charting**
   1. Create/edit - Templates - (Form Builder/Editor) no programing language needed.
   2. Template Library (Prior Exam, Procedures, etc.).
   3. Portrait/face picture of patient for chart, how collected and where placed?
   4. Multiple procedures during the same appointment.
      1. Ability to have at least 4 - 5 different treatments per session - all on the same template (page) and each recorded separately in its own space, with machine settings, other procedure details, and picture(s) etc.
      2. Ability to label each procedure’s corresponding before and after photo.
      3. Compare Visits Visually, comparing progress for a patient across multiple visits.
   5. Photo upload (related to each specific treatment).
      1. Size/number of photos we can upload.
   6. Photo mark-up (related to each specific treatment).
   7. Photo before and after viewing (related to each treatment).
   8. Demonstrate smart phrases/auto text what type Smart phrases/auto text do you use? And if more than one is an option, name and demonstrate each.
   9. Replicate associated patient’s previous procedure - Pull forward notes from a previous appointment for the same procedure and edit for today’s procedure saving time.
5. **Scheduling/Client Communication**
   1. **Set an appointment**
      1. Ability to have more than one patient per time slot. How many?
      2. Texting available to create appointments? Integrated? Populated fields?
      3. Two-Way Texting? If no, what's the workaround? (Is an API available for third parties?) Nice to have.
      4. Email available to create appointments? Integrated? Populated fields?
   2. **Text appointment reminder - Automated?**
      1. Ability to create / edit ourselves.
      2. Two-Way Texting? In no, what's the workaround? (Is an API available for third parties?) Nice to have.
   3. **Email appointment reminder - Automated?**
      1. Email appointment reminders?
   4. **Appointment changes** 
      1. Walk us through the different options.
   5. **Follow-up appointments**
      1. Show how we can email and/or text to create appointments? Integrated? Populated fields?
      2. If not, is an API available for third parties?

**Miscellaneous:**

1. What does guided onboarding include? Get details.
2. Forms/Templates:
   1. Will you create our forms and templates for us with our input?
   2. Form Builder/Editor, proprietary or third party? Language? How long in use?
   3. Is your Form Builder/Editor designed for a lay person to use? Explain.
3. Customer service: How do we make contact? Phone, instant messaging, email, screen sharing, other? What’s the process availability, turnaround time? Support hours of operation: Days of the week? Hours of the day? Converted to our time zone. Assigned rep or not? Is it included in the quoted cost? No extra cost? Is the support US based?
4. Multiply Locations/Offices: Using the same software license and package, each of our locations can independently use software for their site, and the main office can view all locations individually and together, and create reports individually and together?
5. Medical Director chart review: Show us how that’s done. Also, how is it tracked and how do we know that the needed percentage has been reviewed and we’re in compliance?
6. Reports: What reports do you suggest we regularly run, frequency and why?
7. Is a free trial login for further exploration on our own beyond demo an option, before making a commitment?
8. Training: We want the ability to have orientation/training that consists of screen shots and instructions step-by-step allowing the provider to become a competent user of the software by reading the instructions, flat learning curve. Follow the instructions, simple and easy. Colleague providers can walk new providers through the first time at most. Is this need realistic and doable? Explain.