Questions to Ask When Looking for in an eProcurement, Supply Management & AP Automation Platform

Feature Area	Question
Flexibility & Configuration	Can the platform be configured to align with your business rules and preferred supplier list?
Flexibility & Configuration	Can you create approval workflows that match your internal processes?
Flexibility & Configuration	Does the system allow for multi-site or multi-location setup with site-specific rules?
Budget & Contract Awareness	Can the platform support departmental budgets and budget controls?
Budget & Contract Awareness	Does it pull in item-level pricing from contracted vendors?
Budget & Contract Awareness	Can it provide alerts when purchasing off-contract or over budget?
Affordability	Does the pricing model fit within your organization's budget?
Affordability	Are there any hidden costs such as integration or maintenance fees?
Support & Implementation	Is white-glove implementation included?
Support & Implementation	Do they offer ongoing support and training for end users?
Support & Implementation	Will your team need to become the system admin, or is support built-in?
Support & Implementation	How many releases does the system complete a year and is that cost included?
Vendor Fee Transparency	Do they charge vendors transaction or access fees?
Vendor Fee Transparency	Is there a published vendor fee structure available?
System Integration	Does the platform integrate with your EHR and AP systems?
System Integration	Are integration costs included or separate?
Ease of Use	Is the user interface intuitive for both clinical and administrative staff?
Ease of Use	Can users easily search and order supplies?
Ease of Use	Are dashboards and reporting easy to navigate and customize?
All-in-One Platform	Does the system include eProcurement, supply management, charge capture, and AP automation tools?
All-in-One Platform	Can the platform replace multiple legacy systems to avoid tech stacking?
Reporting & Analytics	Does the system provide real-time reporting and analytics?
Reporting & Analytics	Can reports be customized by user role or department?
Security & Compliance	Is the system HIPAA compliant?
Security & Compliance	Does it provide audit trails and user permission controls?

Features	Yes	No	Additonal Comments
Order Products	☐	☐	
EDI	☐	☐	
Punchouts	☐	☐	
Emailed PO	☐	☐	
Supplier/Manufacture Product Content	☐	☐	
Product Cross Reference	☐	☐	
Real-Time Budget Viability	☐	☐	
Budgets - GL Coding/Category/Charge Code	☐	☐	
Order Approvals	☐	☐	
Metrics	☐	☐	
Can it be tied to Budgets	☐	☐	
Devliery Method	☐	☐	
Control Order Guides	☐	☐	
Receiving Module	☐	☐	
Update QOH	☐	☐	
Agreements	☐	☐	
GPO Agreements per Line Item	☐	☐	
Local Agreements per Line Item	☐	☐	
3 Way Match - PO to Receiving to Invoice	☐	☐	
GL Coding	☐	☐	
Per Location	☐	☐	
Per Department	☐	☐	
Per Line Item	☐	☐	
Invoice Automation	☐	☐	
Interactive Reporting	☐	☐	
AP Automation	☐	☐	
API - Import/Export	☐	☐	

Features	Yes	No	Additonal Comments
In-App Help (hints, guides, videos)	☐	☐	
Support	☐	☐	
End User Support	☐	☐	
Hours of Support	☐	☐	
Support Phone Number	☐	☐	
Support Chat	☐	☐	
Support Email	☐	☐	
Support Ticketing System	☐	☐	
Inventory Management and Charge Catpure	☐	☐	
Central Supply - Requisitions and Transfers	☐	☐	
Par Notification	☐	☐	
Internal - Requestions and Transfers	☐	☐	
Product Expiration Reports and Notifications	☐	☐	
Patient Charging	☐	☐	
EHR - Import and Exporting	☐	☐	
API - Import/Export	☐	☐	