Questions to Ask Vendors

Use this checklist to guide vendor conversations and ensure their solution meets the unique needs of your home healthcare workforce.

System Integration & Compatibility

- [ ] Does your system integrate with our existing payroll, scheduling, and timekeeping tools?
- [ ] Is your platform compatible with Electronic Visit Verification (EVV) requirements?
- [ ] Can your solution connect with healthcare credentialing or licensing platforms?
- [ ] Do you offer open APIs for custom integration if needed?

Mobile Accessibility & Field Use

- [ ] Is your platform fully mobile-optimized for caregivers in the field?
- [ ] Can employees clock in/out using geolocation or geofencing?
- [ ] Does the employee self-service portal work on all device types (iOS, Android, etc.)?

Compliance & Reporting

- [ ] How do you stay current with federal, state, and local compliance requirements?
- [ ] Does your system track training completion and expiration dates for certifications?
- [ ] Are you equipped to handle multi-state payroll and overtime regulations?
- [ ] Can you generate audit-ready reports (e.g., wage history, tax filings, EVV logs)?

Security & Data Protection

- [ ] What encryption and security protocols do you use to protect employee data?
- [ ] Are you HIPAA-compliant?
- [ ] How is user access managed? Do you offer role-based access controls?
- [ ] How long is data retained, and is it accessible during audits?

Features & Functionality

☐ Do you offer healthcare-specific features, such as caregiver credential tracking or shift differential pay?

☐ Is your scheduling tool optimized for part-time, full-time, and 24-hour rotating shifts?

☐ Does your ATS support license verification and pre-employment background checks?

☐ Can the LMS deliver HIPAA, OSHA, and industry-specific training modules?

Support & Implementation

☐ What does your implementation process look like, and how long does it take?

☐ Will we have a dedicated account manager or support rep?

☐ What kind of training and onboarding do you provide for our staff?

☐ What is your average response time for support requests?

Pricing & Contract Terms

☐ What's included in the base price, and what features cost extra?

☐ Are there hidden fees (e.g., per-user, per-admin, data exports)?

☐ Do you offer scalable pricing as we grow or add locations?

☐ What are the cancellation terms or contract minimums?

Performance & Results

☐ Do you provide dashboards or real-time analytics on workforce performance?

☐ Can your platform track turnover, engagement, and cost per hire?

☐ Do you have case studies or success stories with other home health agencies?