

Vendor Evaluation Worksheet

Compare access, communication, intake, and workflow efficiency across the industry

Use this sheet to narrow down which vendor most aligns with your business goals:

- 1 Start by marking as priority all the capabilities that are important to your organization
- 2 Fill in empty sections with vendors you are considering
- 3 Rate each vendor against the criteria on the left based on your top priorities from 1-5 (with 5 being highest)
- 4 Add up the score in the row at the bottom

Connect with our team to see how Luma can help your organization!

FEATURES	PRIORITY				
Example	✓	5	4	3	5

Platform

FEATURES	PRIORITY				
Comprehensive patient journey management					
Unified platform					
Developed in house					
Developed through acquisitions and partnerships					
Primarily a specialized point solution (not a platform)					
Automated, customizable workflows					
AI-enabled					
TOTAL SCORE					

Efficiency

FEATURES	PRIORITY				
Able to show where it saves staff time					
Able to show completed journey without requiring staff intervention					
Do they automate faxes or do they outsource it to a team?					
TOTAL SCORE					

Access

FEATURES	PRIORITY				
Appointment management					
Actionable reminders					
Customizable reminders					
Automated waitlist					
Self rescheduling					
Patient referrals					
Feedback management					
TOTAL SCORE					

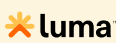
Communication

FEATURES	PRIORITY				
Two-way patient communication					
Emphasis on accessibility					
Only offers comprehensive messaging					
Primarily a voice first technology					
Self rescheduling					
Includes a Hub that provides visibility to all messaging					
AI-powered concierge					
TOTAL SCORE					

Intake, preparation, and payment

FEATURES	PRIORITY				
Patient intake					
Insurance eligibility & verification					
Payment collection					
TOTAL SCORE					

Integration

FEATURES	PRIORITY				
Proven integration with my EHR					
Built on APIs, FHIR APIs, CCL, HL7					
Built on RPAs					
Bidirectional write back					
TOTAL SCORE					

Security

FEATURES	PRIORITY				
ISO 27001:2022 certified					
ISO 42001 compliant (for AI)					
HITRUST certified					
SOC 2 Type II certified					
TX-RAMP Level 2 certified					
Cloud-based infrastructure					
TOTAL SCORE					

Reporting

FEATURES	PRIORITY				
Advanced analytics					
ROI Reports					
TOTAL SCORE					

Analyst criteria

FEATURES	PRIORITY				
KLAS culture rating					
KLAS loyalty rating					
KLAS operations rating					
KLAS product rating					
KLAS relationship rating					
KLAS value rating					
AVIA vendor ratings					
TOTAL SCORE					

Total score

FEATURES				
Platform				
Efficiency				
Access				
Communication				
Intake, preparation, and payment				
Integration				
Security				
Reporting				
Analyst criteria				
TOTAL SCORE				

See how Luma's Patient Success Platform can help you create loyal patients, eliminate manual tasks for staff, and drive revenue with EHR-integrated workflows.

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