

Vendor call *scorecard*

Five questions that separate a good demo from a tool your team can defend in an appeal or an audit. Ask every vendor the same five. **Mark "Showed" only if they demonstrated it on a real case;** a claim is "Said."

Evaluated by

Date

Question	Vendor A	Vendor B	Vendor C
1 Will the same case always get the same answer? Good answer: Exact rules; the same case and policy version always return the same result. Red flag: "Our accuracy is very high." Accuracy isn't consistency.	☐ Showed ☐ Said ☐ No	☐ Showed ☐ Said ☐ No	☐ Showed ☐ Said ☐ No
2 Does every answer show the chart evidence and the policy sentence? Good answer: Each criterion links to the chart page and line, and to the policy text. Missing evidence is flagged. Red flag: An AI-written summary you can't check against the source.	☐ Showed ☐ Said ☐ No	☐ Showed ☐ Said ☐ No	☐ Showed ☐ Said ☐ No
3 How are equivalent codes and drug names handled? Good answer: Equivalents are recognized, and it shows when it matched on one. Red flag: "We search the document for the code."	☐ Showed ☐ Said ☐ No	☐ Showed ☐ Said ☐ No	☐ Showed ☐ Said ☐ No
4 How fast do policy changes show up, and which cases do they affect? Good answer: Every version kept, affected cases flagged, past claims checked against the version in force. Red flag: "We update the policies periodically."	☐ Showed ☐ Said ☐ No	☐ Showed ☐ Said ☐ No	☐ Showed ☐ Said ☐ No
5 Does it work beside Epic and your current tools, or replace them? Good answer: Plugs into your prior-auth tool or Epic via FHIR; starts as a trial on past cases. Red flag: "Your team will work in our platform."	☐ Showed ☐ Said ☐ No	☐ Showed ☐ Said ☐ No	☐ Showed ☐ Said ☐ No
Total Count "Showed" first; it's the only mark that's proof.	Showed / 5	Showed / 5	Showed / 5

Give every vendor the same test

Pick the payer policy family that causes your team the most trouble and a handful of past cases. Ask each vendor to show which denials were preventable, at which step, and what was missing.

Policy family

Payer

Cases to replay

Who reviews results

Before you sign

☐ Where patient data is processed and stored, by whom, and for how long

☐ What your IT and Epic teams would have to build or configure

☐ A trial on your own past cases before anything touches live work