

REQUEST FOR PROPOSAL (RFP) OUTLINE

A request for proposal that follows an outline like the one below will tell prospective vendors what they need to know about your practice to provide you with useful information about their products, and it will help to ensure that the responses you receive can be more easily compared.

- I. Cover letter
- II. Introduction and selection process
- III. Background information about your practice
 - a. Size and location
 - b. Current practice management system and any EHRs
 - c. Current computer hardware
 - d. Current network information
- IV. Your practice's desired EHR functionality (prioritized)
- V. Vendor information
 - a. Company history
 - b. Number of employees (separate numbers for sales, support, research and development, and management)
 - c. Financial statements
 - d. History of their EHR product
 - e. List of all current EHR users and list of users similar to your practice in size and type (including how long they've been using the software and, ideally, what version they're using currently)
- VI. Product description
 - a. How it performs the functions described in section IV
 - b. Other functions it performs
 - c. Product brochures, etc.
 - d. Software versions and release dates
- VII. Hardware and network requirements
- VIII. Customer maintenance and support
- IX. Vendor training
- X. Implementation plan
- XI. Interface history and capabilities
- XII. Proposed costs and payment schedule
- XIII. Warranties
- XIV. Sample contract



FPM Toolbox To find more practice resources, visit <https://www.aafp.org/fpm/toolbox>.

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