
QUESTIONS TO ASK BEFORE CHOOSING AN AI INTAKE FORM VENDOR

Functionality & Flexibility

- Does the intake form use adaptive logic (e.g., conditional questions based on responses)?
- Can we fully customize the questions to reflect our practice's clinical needs?
- Can the system collect images or documents (e.g., insurance cards, previous prescriptions)?
- Is the form mobile-optimized and accessible (ADA compliant, multilingual)?

Integration with Existing Systems

- Does this platform integrate with our current EMR/EHR and practice management system?
- Is the data imported automatically or manually into the patient record?
- Are there integration fees or additional software required?

Data Privacy & Compliance

- Is the platform fully HIPAA-compliant?
- How is patient data stored and encrypted — both in transit and at rest?
- Can I restrict access to sensitive data or assign user permissions?
- What happens to the data if we cancel the service — can we export it?

Clinical Impact

- Will the adaptive questions help flag high-risk patients or guide clinical priorities?
- Can the intake data support clinical decision-making before the patient arrives?
- Are there analytics tools to review form usage, completion rates, or flagged concerns?

Usability (Patient & Staff)

- How long does it typically take a patient to complete the form?
- What happens if a patient doesn't complete it before their appointment?
- Can the system accommodate patients with limited tech literacy?
- How easy is it for front desk staff to review, edit, or resend a form?

Pricing & Support

- What is the pricing model (flat fee, per-use, tiered plan)?
- Are there onboarding, training, or customization costs?
- Is there a contract or minimum term commitment?
- What kind of technical support is offered — phone, chat, email? During what hours?

Scalability & Future-Proofing

- Can the system scale with our practice if we open new locations or add providers?
- Does the company have a roadmap for updates (e.g., integration with AI triage or scheduling)?
- Are there any current clients in optometry I can speak with or case studies available?