AI Tool Evaluation Checklist

Use this checklist to confidently evaluate AI tools—especially those that affect clinical documentation. These questions help ensure the solution is secure, compliant, and usable in the field. **For more on how Patrium's AI solutions can support your agency, visit patriumhealth.com**

1. HIPAA & Data Security

- ❑ Does the vendor sign a Business Associate Agreement (BAA)?
- ❑ Do they offer policy templates or guidance to support HIPAA-compliant AI adoption?
- ❑ Is all Protected Health Information (PHI) encrypted at rest and in transit?
- ❑ Where is data stored?
    - ❑ U.S.-based servers
    - ❑ Compliant with HIPAA/HITECH)
- ❑ Does the vendor conduct regular security audits and penetration testing?
- ❑ Is there role-based access control and audit logging?

2. Regulatory Compliance

- ❑ Does the documentation output meet CMS, CHAP, and relevant state or payer standards? (Check for CHAP verification)
- ❑ Has the tool been reviewed or validated by clinical compliance experts?
- ❑ Is documentation considered audit-ready, meaning it's complete, traceable, and time-stamped?
- ❑ Can you track and attribute any manual changes to AI-generated documentation?
- ❑ Does the tool support QAPI goals with measurable quality or compliance metrics?

3. EHR Integration & Workflow Fit

- ❑ Can the AI tool integrate with your current EHR or systems?
- ❑ Does it fit into your existing workflows, or would it require significant change management?
- ❑ Can it populate documentation using existing clinical data or templates?
- ❑ Is the interface optimized for use in the field, including mobile or tablet use?
- ❑ Does the tool have an offline mode or will it require internet access?

4. Customization & Clinical Relevance

- ❑ Are templates, terminology, and documentation logic customizable to reflect your agency's specific workflows?
- ❑ Can it support various visit types, such as SOC, Recert, PRN, or Discharge?
- ❑ Is the tool designed to reflect both home health and hospice-specific clinical workflows?
- ❑ Can it be tailored to accommodate specific patient populations, diagnoses, or clinical disciplines?
- ❑ Does it support a team-based care model with appropriate clinical nuance?

5. Training & Support

- ❑ Is training (both technical and behavioral) tailored to different roles—such as clinicians, QA, and intake coordinators?
- ❑ Does the vendor offer multiple types of training, including live sessions, on-demand materials, and written guides?
- ❑ Is there ongoing support after implementation, not just during onboarding?
- ❑ Will there be internal "super users" or clinician champions to support adoption?
- ❑ Are follow-up trainings or onboarding refreshers available for new hires or after go-live?

6. Ongoing Improvement & Transparency

- ❑ Is the AI model updated based on your agency's specific feedback and usage data?
- ❑ Do you have visibility into how the AI system is evolving or being improved?
- ❑ Can you understand how outputs are generated or edited (e.g., through transparent AI logic or change logs)?
- ❑ Does the vendor provide regular product performance updates or usage insights?
- ❑ Is there a commitment to keeping the technology aligned with both clinical workflows and regulatory expectations?

How to Use This Checklist

Use this guide when exploring new vendors, conducting demos, or reassessing current tools. It helps ensure you're asking the right questions, aligning your internal teams, and choosing a solution that fits your clinical, operational, and compliance needs—not just your IT wish list.

CHAP