Practice software demo scorecard

Give every vendor the same synthetic tasks and record what was demonstrated, claimed, not verified or unsuitable.

This worksheet helps organize a decision and its evidence. Enter the exact source, date and context. Unknown information remains an open question. The worksheet does not establish admission, professional authorization, legal compliance or financial viability. Keep completed records privately and do not send client or patient information to this website.

HOW TO USE IT

01 List your required workflows first (page 1). A long feature list is less useful than seeing the actual tasks done.

02 Give every vendor the same scripted tasks with synthetic data (page 2). Never upload real patient data for this test.

03 Ask for contract and pricing context, not only a sales demonstration (page 3). Include migration and exit costs.

04 Summarize the evidence and keep open items with an owner (page 4). The scorecard does not declare a winner.

01 Requirements

Requirement area The question to answer in the demo	**Your requirement** What your practice actually needs	**Must have or nice to have**	**Notes**
Scheduling Can the actual appointment, staff, location and reminder workflow be demonstrated?			
Records and forms Can required administrative and documentation workflows be configured? Use synthetic data in trials.			
Billing What payment, invoice and insurance workflows are available in the exact plan and jurisdiction?			
Roles and security Which access controls, logs, contracts and administrative responsibilities apply?			
Migration/export What can be imported/exported, in what format, at what cost, and after cancellation?			
Integrations Is the required connection native, paid, limited or unavailable? Verify the actual workflow.			
Total cost Base plan, extra users, transaction fees, messaging, add-ons, migration and support.			

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02 Scripted tasks

Ask every vendor to complete the same tasks with synthetic data. Mark each task demonstrated, claimed, not verified or unsuitable. Never upload real patient data for this editorial test.

No.	Task (synthetic data only)	**Vendor 1** Name _____ Plan, region _____ Demo date _____	**Vendor 2** Name _____ Plan, region _____ Demo date _____	**Vendor 3** Name _____ Plan, region _____ Demo date _____	**Vendor 4** Name _____ Plan, region _____ Demo date _____
T1	**Create a synthetic staff role.**	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U
T2	**Schedule and reschedule a fictional appointment.**	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U
T3	**Enter a synthetic administrative record.**	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U
T4	**Produce a test invoice without charging.**	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U
T5	**Locate role permissions.**	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U
T6	**Export the sample record.**	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U
T7	**Identify cancellation and retrieval steps.**	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U
T8	Your own task	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U
T9	Your own task	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U	☐ D ☐ C ☐ NV ☐ U

TICK ONE BOX PER TASK

- D **demonstrated** · You saw the task completed in the product, with synthetic data.
- C **claimed** · The vendor said it works, but you did not see it done.
- NV **not verified** · Not shown or not answered yet: an open item.
- U **unsuitable for this requirement** · Shown, and it does not fit what your practice needs.

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03 Commercial, security and export questions

Ask for contract and pricing context, not only a sales demonstration. Record the answer, who gave it and the date. Include migration and exit costs.

No.	Area	Question	Vendor 1 Answer, source, date	Vendor 2 Answer, source, date	Vendor 3 Answer, source, date	Vendor 4 Answer, source, date
Q1	COMMERCIAL	Exact plan name, billing period and region of the price you were given.				
Q2	COMMERCIAL	Total cost: base plan, extra users, transaction fees, messaging, add-ons, migration and support.				
Q3	COMMERCIAL	Contract term, renewal, notice period and cancellation terms.				
Q4	COMMERCIAL	Payment, invoice and insurance workflows available in the exact plan and jurisdiction.				
Q5	SECURITY	Which access controls, logs, contracts and administrative responsibilities apply?				
Q6	SECURITY	Who administers roles and permissions, and how is access removed when someone leaves?				
Q7	EXPORT	What can be imported, in what format, at what cost?				
Q8	EXPORT	What can be exported, in what format, and what access remains after cancellation?				
Q9	EXPORT	Is each required integration native, paid, limited or unavailable?				
Q10	SUPPORT	Support channels, hours and help with migration.				

Vendor claims are not a legal determination that a particular practice configuration complies with every applicable rule. The buyer must evaluate contracts, configuration and responsibilities with appropriate advisers.

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04 Final evidence and open items

Count each rating from page 2 and summarize what you actually saw. Unverified items stay open until someone checks them.

Vendor	D demonstrated	C claimed	NV not verified	U unsuitable for this requirement	What you saw demonstrated	Unresolved requirements	Next step
Vendor 1							
Vendor 2							
Vendor 3							
Vendor 4							

OPEN ITEMS

No.	Open item	Vendor	Owner	Due	Resolved: date and evidence
1					
2					
3					
4					
5					

This scorecard does not declare a winner. Commercial relationships do not change the questions or turn an untested platform into a recommendation. License: Personal study and internal use within one practice permitted. Share unmodified blank free files with attribution; no resale, removal of attribution or implied certification.