COMPANION GUIDE · OPEN SANDBOX

An E-Prescribing Integration Evaluation Guide

Seven vendor questions, a comparison worksheet and a practical checklist for platform teams.

HOW TO USE THIS GUIDE

An open sandbox can help your developers explore an API. To evaluate an e-prescribing partner, your team also needs a clear view of the workflows, implementation effort and ongoing support involved.

Use this guide during vendor discussions. Record specific answers and supporting materials, then revisit unresolved questions before committing to the build.

01 Platform needs brief

02 Seven partner questions

03 Vendor comparison worksheet

04 Evaluation-to-launch checklist

05 Cost & decision record

STEP 01

Start with your platform's needs

Complete this brief before comparing vendors so each discussion begins with the same requirements.

Who should weigh in

Product, engineering, clinical operations and the people responsible for privacy and security, where their input is needed.

01	Who will prescribe, and in which care settings?	
02	Which prescribing workflows are needed for the initial launch?	
03	Which additional workflows are planned for later phases?	
04	Is controlled substance prescribing in scope?	
05	Do you need an embedded interface, a native API integration or a combination?	
06	Which platform records and workflows must connect to prescribing?	
07	What is the target launch date, and what drives it?	
08	Who owns implementation and provider support internally?	

STEP 02

Seven questions to ask every integration partner

Record specific answers and supporting materials, then revisit unresolved questions before committing to the build.

01 What experience do you have taking platforms like ours live?

Ask for examples relevant to your care setting, product architecture and intended prescribing workflows. Find out how much of the proposed approach is already in use and where your project would require new development.

REQUEST

A comparable implementation example, references where available and a walkthrough of the workflows you need.

RECORD

Relevant experience, any new development and questions requiring follow-up.

02 How is the sandbox managed, and what can we test?

Clarify who can access the environment, which functions it supports and how closely it reflects production behavior. Ask what test data is permitted, how credentials are managed and what agreements apply to each stage. Establish the rules before sending data.

REQUEST

Sandbox documentation, test-data instructions, access requirements and a list of differences from production.

RECORD

Available tests, restrictions, known gaps and who will review the data requirements internally.

03 How do you measure reliability and handle disruptions?

Ask how the partner distinguishes sandbox availability from production performance. Discuss failed transactions, incident escalation, planned maintenance and communication during an outage.

REQUEST

Documented service commitments, available performance history, status communications and an incident escalation process.

RECORD

Measurement definitions, exclusions, response commitments and your platform's responsibilities.

04 How will prescribers get set up and complete their work?

Walk through the provider journey from account setup to the first prescription. If controlled substance prescribing is in scope, include identity verification, authentication and the associated onboarding steps in that discussion.

REQUEST

A demonstration of setup, routine prescribing and an exception or failed step.

RECORD

Provider steps, configuration needs, workflow limitations and support ownership.

05 What evidence supports the quality of the prescribing experience?

Ask how the partner evaluates transaction quality and identifies issues affecting providers or pharmacy communication. Explore how feedback leads to fixes and how changes are tested before release.

REQUEST

Defined quality measures, relevant independent recognition and examples of issue resolution or product improvement.

RECORD

What the evidence measures, how recent it is and how it relates to your intended use.

06 What is a realistic path to production for our scope?

Ask for a plan based on your actual requirements. Include agreements, technical work, testing, provider setup and any certification or approval activities that apply. Make ownership explicit rather than assuming a vendor's existing certifications remove every platform responsibility.

REQUEST

A milestone plan with owners, dependencies, acceptance criteria and the assumptions behind the estimated timeline.

RECORD

Work required from each team, unresolved dependencies and likely causes of delay.

07 Who supports developers during the build and providers after launch?

Discuss day-to-day implementation help, technical escalation and provider support. Establish what happens when the source of an issue is unclear or involves both systems.

REQUEST

Named roles, support channels, coverage hours, escalation procedures and the handoff plan for launch.

RECORD

Included support, additional fees, response commitments and responsibility for communicating with providers.

Ask every partner the same seven questions, in the same order, and capture the answers on the worksheet that follows.

Request evidence rather than assurances, and note what each document measures and how recent it is.

NOTES FROM VENDOR CONVERSATIONS

STEP 03

Vendor comparison worksheet

Same standard
Use the same requirements and evidence standards for each partner.

Status
Mark answers as confirmed, pending or unavailable.

No assumptions
An unanswered question is a follow-up item.

EVALUATION AREA	PARTNER A: _____	PARTNER B: _____
Relevant platforms live and comparable experience		
Initial workflow coverage and limitations		
Sandbox access and permitted test data		
Differences between sandbox and production		
Production reliability and incident handling		
Prescriber setup and controlled substance workflows		
Quality measures and supporting evidence		
Implementation milestones and dependencies		
Certification and approval responsibilities		
Developer and provider support		
Setup, recurring and usage-based fees		
Estimated internal engineering and operational effort		
Open questions and follow-up owner		

STEP 04

Checklist: From evaluation to launch

Work through each stage in order. Tick items as they are confirmed.

01 Before choosing a partner

- [ ] Define launch requirements and separate later-phase needs.
- [ ] Demonstrate the required workflows, including exceptions.
- [ ] Review relevant implementation examples and supporting evidence.
- [ ] Confirm sandbox access, permitted data and production differences.
- [ ] Review privacy, security and agreement requirements with the appropriate internal owners.
- [ ] Compare vendor charges alongside internal implementation effort.
- [ ] Assign owners and due dates to unanswered questions.

02 Before committing to a launch date

- [ ] Agree on scope, milestones, responsibilities and acceptance criteria.
- [ ] Identify required testing, certification or approval activities and their owners.
- [ ] Confirm prescriber onboarding steps and dependencies.
- [ ] Establish technical support channels and escalation procedures.
- [ ] Plan for failed transactions and service disruptions.
- [ ] Set the launch date against confirmed dependencies and resource availability.

03 Before providers begin prescribing

- [ ] Complete the agreed validation and resolve launch-blocking issues.
- [ ] Confirm that required agreements and approvals are in place.
- [ ] Verify provider setup and access for the initial launch group.
- [ ] Give providers clear instructions and support contacts.
- [ ] Confirm monitoring and incident communication responsibilities.
- [ ] Assign owners for launch-day support and the initial post-launch review.

STEP 05

Compare the full implementation commitment

A useful cost comparison includes the vendor's fees and the work your own team must complete. Use ranges where estimates remain uncertain, and document the assumptions behind them.

COST OR RESOURCE	YOUR ESTIMATE	ASSUMPTIONS OR FOLLOW-UP
Vendor setup and implementation fees		
Recurring, usage-based and optional service charges		
Internal engineering and testing effort		
Product, clinical and operational coordination		
Provider onboarding and training		
Ongoing maintenance and support		
Potential rework if requirements or assumptions change		

Close the evaluation with a documented decision

Capture the outcome so the decision, its reasoning and its follow-ups stay with the project.

PREFERRED PARTNER

REASONS THIS PARTNER FITS OUR LAUNCH REQUIREMENTS

REMAINING QUESTIONS OR DEPENDENCIES

OWNER AND DUE DATE FOR EACH FOLLOW-UP

NEXT MILESTONE

NEXT STEP

Discuss your integration with DAW Systems

Evaluating ScriptSure Cloud E-Prescribing (eRx) for your platform? Bring your workflow requirements and questions to a conversation with DAW Systems. We can discuss the integration approach, implementation responsibilities and support your team needs.

Contact DAW Systems dawsystems.com