

Visitor management buyer's checklist

Vendor 1: _____ Vendor 2: _____ Date: _____

Questions to ask any vendor, ours included. The privacy questions are things to check, not legal advice; a clinic should also ask its college or privacy adviser.

Fit

Question	Vendor 1	Vendor 2
How many locations and visitors does the price cover, and what happens if we go over?		
Can we change the questions visitors are asked, and keep them to a few?		
Can staff sign in and out too, so the headcount includes everyone?		

Hardware

Question	Vendor 1	Vendor 2
Does it run on a tablet we already own, or does it need a kiosk, a printer or a contract?		
Is it an app to install, or a web page in the tablet's browser?		
What does the visitor see if the internet drops at the door?		

Notifications

Question	Vendor 1	Vendor 2
How is the host told a visitor has arrived: text, email or an app? Does each host need an account?		
Who is told when a visitor does not name anyone?		

Data and privacy (Canada)

Question	Vendor 1	Vendor 2
Where are visitor records stored, and where are they processed (texts, AI features, support)?		
Will you list your subprocessors, and sign a written agreement for the data you hold for us?		
Can the next visitor see who signed in before them?		
Are photographs and ID scans optional, and off unless we switch them on?		
Clinics: can we keep health details, such as the reason for a visit, out of the sign-in?		

Retention and deletion

Question	Vendor 1	Vendor 2
Can we choose how long visitor details are kept, and are they cleared on that schedule?		
Can we erase one visitor's record when they ask?		

Trial and exit

Question	Vendor 1	Vendor 2
Can we try the whole loop, from sign-in to host alert to sign-out, before paying?		
Can we download every record, for example as a CSV file, at any time?		
When we cancel, what happens to our data, and how soon is it deleted?		
What is the price per location per month, in which currency, and for how long a contract?		