

EAP Software Needs Assessment Checklist™

Listed below are 20 of the most frequently identified EAP software needs. Please rate how important each of these features is to your program, and then rate how well your existing software is performing in those same areas.

	How important is this feature?				How well does your existing software perform?													
	Not Important			Very Important	Not Included			Very Satisfied										
1. User friendly and easy to learn.....	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4
2. Ability to customize software to meet needs.....	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4
3. Ensuring HIPAA compliance.....	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4
4. Facilitating account and contract management.....	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4
5. Connecting EAP satellite offices.....	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4
6. Centralized appointment scheduling.....	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4
7. Integrating call center or intake staff.....	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4
8. Automatically populating HR data into screens....	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4
9. Client tracking and follow-up.....	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4
10. Managing the EAP affiliate network.....	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4
11. Facilitating payments to EAP affiliates.....	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4
12. Managing the outside resources network.....	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4
13. Tracking supervisor and manager consultations....	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4
14. Tracking organizational and non-case services....	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4
15. Facilitating satisfaction surveys.....	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4
16. Easy to prepare customer reports.....	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4
17. Running reports for specific division/departments	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4
18. Benchmarking on key performance metrics.....	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4
19. Measuring workplace outcomes.....	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4
20. Demonstrating business value.....	0	.....	1	.....	2	.....	3	.....	4	0	.....	1	.....	2	.....	3	.....	4