Clinical Needs Assessment Checklist

Use this checklist to guide discussions with clinical teams and ensure all key considerations are addressed before selecting or purchasing medical equipment.

1. Clinical Need & Purpose

- √ What clinical problem or workflow challenge will this equipment solve?
- √ Which department(s) will use it?
- √ Which clinical specialties or service lines are impacted (e.g., OR, GI, imaging, anesthesia)?
- √ Is this request driven by patient safety concerns, quality improvement, capacity needs, or regulatory requirements?
- √ Is the equipment replacing an outdated device or adding new capabilities?

2. Patient Population & Volume

- √ What types of patients will use this equipment (age, acuity, procedure type)?
- √ What is the expected daily/weekly/monthly volume?
- √ Will this purchase support projected volume growth or new service expansion?
- √ Does the equipment need to accommodate bariatric, pediatric, or special-needs populations?

3. Clinical Workflow Impact

√ How will this equipment affect clinician workflow?

√ Will it improve efficiency, reduce manual steps, or eliminate bottlenecks?

√ Will it decrease turnover time, reduce procedure length, or support a higher case load?

√ Are there known pain points in the current process that this equipment should address?

4. Essential Features & Specifications

√ What features are required for safe, effective use?

√ What features are nice to have but not essential?

√ Are there specific performance metrics or technical specs that matter (e.g., imaging resolution, weight capacity, battery life, speed)?

√ Does this equipment require specialized disposables or accessories?

5. Safety, Quality, & Compliance

√ Does the equipment support patient safety improvements?

√ Are there infection control considerations?

√ Does it meet current regulatory or accreditation requirements (CMS, Joint Commission, AAAHC, etc.)?

√ Does it require updated policies, competencies, or manufacturer documentation?

6. Staffing & Training Needs

√ Which staff will use or support the equipment (nurses, techs, surgeons, biomeds, anesthesia)?

√ Will new competencies or certifications be required?

√ Does the clinical team prefer hands-on training, in-service sessions, or virtual modules?

√ Is there a training plan for new hires or annual refreshers?

7. Space, Utilities, and IT Requirements

√ What space will the equipment occupy, and does it fit?

√ Are electrical, plumbing, ventilation, or structural changes needed?

√ Does it require IT integration (EHR, PACS, monitoring systems, Wi-Fi, network ports)?

√ Does it impact storage, patient flow, or room turnover?

8. Current Equipment Evaluation

√ What equipment is currently being used for this purpose?

√ What issues or limitations exist with the current equipment?

√ Is the current equipment at end of life or no longer supported by the manufacturer?

√ Could repair, refurbishment, or reallocation solve the problem instead?

9. Financial Considerations

√ What is the estimated purchase cost?

√ What are the operating costs (service, consumables, accessories)?

√ How many departments or service lines benefit from this investment?

√ Is this purchase budgeted for the current fiscal year?

- √ What are the expected ROI or cost-saving opportunities?

10. Vendor & Product Comparison

- √ Have 2–3 vendor options been reviewed?
- √ Have demos or clinical trials been completed?
- √ Are there known issues with certain models or manufacturers?
- √ Which product aligns best with clinical requirements and budget?

11. Implementation & Go-Live Planning

- √ Does the department have a preferred installation timeline?
- √ Will patient care need to pause or be rescheduled?
- √ Are facilities, IT, and clinical engineering aligned on the plan?
- √ Who is responsible for coordinating delivery, staging, assembly, and testing?

12. Long-Term Lifecycle Planning

- √ What is the expected lifespan of the equipment?
- √ Are service contracts or preventive maintenance plans required?
- √ How will the equipment be tracked and managed (asset tagging, inventory system)?
- √ Are future software updates, integrations, or upgrades expected?