

# 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.

## 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- ☐ Is the equipment replacing an outdated device or adding new capabilities?

## 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?

## 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?

## 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?

## Safety, Quality, & Compliance

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- ☐ 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?

## Staffing & Training Needs

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- ☐ Which staff will use or support the equipment (nurses, techs, surgeons, biomed, 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?

## Space, Utilities, & IT Requirements

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- ☐ 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?

## Current Equipment Evaluation

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- ☐ 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?

## Financial Considerations

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- ☐ 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?

## Vendor & Product Comparison

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- ☐ 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?

## Implementation & Go-Live Planning

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- ☐ 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?

## Long-Term Lifecycle Planning

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- ☐ 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?



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