A&G Technology Vendor Evaluation Table

Selecting the right A&G technology partner is too important to leave to gut feeling or marketing promises. Use this table as a structured evaluation tool for every vendor you're considering.

For each factor, mark whether the vendor delivers on the requirement (Yes = 2 points, Partial = 1 point, No = 0 points). Add up the total score at the end to get the vendor's overall fit.

- 16–18 points (High Fit): Vendor meets critical compliance, oversight, and experience needs. Strong candidate for enterprise adoption.
- 9–15 points (Moderate Fit): Vendor covers some areas but leaves gaps in audit readiness, reporting, or delegated oversight. Proceed with caution or consider phased use.
- 0–8 points (Low Fit): Vendor lacks essential capabilities. Risky choice with potential compliance and member trust impact.

Factor	Question	Yes	Partial	No
Audit readiness	Can the platform auto-generate CMS universes, scrub data, and log every action for audits?	☐	☐	☐
Structured intake	Does it capture and classify cases from portals, phone, mail, and DEs in a unified system?	☐	☐	☐
SLA monitoring	Does it provide real-time dashboards to flag SLA risks and automate escalations?	☐	☐	☐
Delegated oversight	Can DEs submit through a secure portal, with scrubbed and validated data?	☐	☐	☐
Root cause analytics	Does it surface repeat issues (provider, denial, benefit) and share insights enterprise-wide?	☐	☐	☐
Scalability	Can it scale across Medicare, Medicaid, and Commercial without custom builds?	☐	☐	☐
Integration	Does it integrate seamlessly with claims, UM, CRM, and provider systems?	☐	☐	☐
CMS expertise	Has the vendor supported plans through CMS audits and CAPs before?	☐	☐	☐
Reporting	Does it offer configurable, self-service reporting for compliance and executives?	☐	☐	☐

The vendor you choose should not only pass this checklist but also demonstrate domain expertise, scalability across lines of business, and proven success with CMS audits. For most plans, the right partner is one that doesn't just provide tools but delivers continuous audit readiness, operational efficiency, and measurable improvements in member experience. That's the difference between technology as infrastructure and technology as strategy.