InterFAX

CHECKLIST

AI Implementation Checklist for Healthcare CIOs & CTOs

Do you have the visibility you need to:

NO	SOMEWHAT	YES	
			Strategic Planning & Stakeholder Alignment
☐	☐	☐	**Define clear goals:** Identify which workflows (e.g., patient intake, referrals, billing, lab requests) will benefit most from AI-powered fax automation.
☐	☐	☐	**Secure stakeholder buy-in:** Engage clinical, informatics, and administrative leaders early to ensure alignment and support.
☐	☐	☐	**Assess readiness across departments:** Determine which teams are fax-reliant and where integration will be most impactful.
			Technical Integration & Infrastructure
☐	☐	☐	**Evaluate EMR/EHR compatibility:** Verify that InterFAX+AI can integrate with existing systems, solutions, or custom platforms.
☐	☐	☐	**Ensure secure data routing:** Confirm HIPAA-compliant routing and storage of PHI using TLS encryption, user authentication, and "delete upon delivery" protocols.
☐	☐	☐	**Enable AI-powered OCR and classification:** Use AI to extract, tag, and route documents automatically, reducing manual workload and human error.
			Governance, Compliance & Risk Assessment
☐	☐	☐	**Establish data governance protocols:** Define how patient data will be safely handled, stored, and audited across departments.
☐	☐	☐	**Monitor AI performance:** Create dashboards and reporting tools to track and analyze accuracy, error rates, and workflow efficiency.
☐	☐	☐	**Prepare for audits:** Ensure documentation and logs are available for HIPAA, GDPR, and SOC 2 Type II compliance.
			Change Management & Training
☐	☐	☐	**Create department-level toolkits:** Provide resources to help teams understand benefits and implementation processes to ensure a smooth transition.
☐	☐	☐	**Run pilot programs:** Start with a few departments to test workflows and gather feedback, so IT can address any potential issues before the full rollout.
☐	☐	☐	**Offer training sessions:** Educate staff on using their InterFAX+AI dashboard, automation features, and integration points.

InterFAX

NO	SOMEWHAT	YES	
			Operational Optimization Features
☐	☐	☐	**Automate routine tasks:** Use AI to handle appointment scheduling, lab result routing, insurance claims, and more.
☐	☐	☐	**Track ROI and efficiency gains:** Measure the results, including time savings, processes streamlined, cost reductions, etc., for a full evaluation.
☐	☐	☐	**Scale as needed:** Adjust fax volume and workflows based on department needs and seasonal demand.
			Communication & Advocacy
☐	☐	☐	**Keep your team informed:** Utilize templated emails and customize to your needs to help department heads prepare for onboarding.
☐	☐	☐	**Promote your successes:** Share internal wins and metrics to encourage adoption across departments.
☐	☐	☐	**Educate your users:** Leverage videos, blog content, and other resources to clearly explain the value of InterFAX+AI.
☐	☐	☐	**Engage with peer networks:** Participate in forums such as HIMSS to learn from other CIOs and CTOs.

Tally your score to see where you stand.

Now you have the information you need to consider strategic next steps.

Total Score: _____ ☐

NOT READY

There's no better time to take the first step. Book your consultation to find out how you can get started.

Book my consultation

Total Score: _____ ☐

SOMEWHAT

You're on the right path! Find out what you can do to optimize your digital workflows and technology investments.

Speak with an expert

Total Score: _____ ☐

READY

The sky's the limit! Go beyond basic cloud fax functionalities to support future initiatives for your business.

Show me how

uplandsoftware.com/interfax