



Buying a digital tool: a checklist for care and health teams

Questions to ask before buying software, so it fits the work, is safe and lasts.



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About this PDF

This guide is a tagged PDF with headings, bookmarks and alternative text. You can also read it online at caresque.co.uk/guides/buying-a-digital-tool-checklist. Need this in another format? Email hello@caresque.co.uk.

Start with the job and the people

Before you look at any product, write down the job you need done and the people who will do it. A tool that fits the work will be used. One that does not will be worked around.

- ☐ We can describe the problem in one or two sentences.
 - ☐ We know who will use the tool every day, and we have asked them what they need.

Map today's workflow

- ☐ We have followed the work from start to finish with the people who do it.
- ☐ We know where information is typed more than once.
- ☐ We know where work waits, and why.

Must haves and nice to haves

- ☐ We have a short list of must haves, agreed by the people who will use the tool.
- ☐ Nice to haves are listed separately, so they do not decide the choice.

Data protection and security

- ☐ We have considered whether we need a Data Protection Impact Assessment, using the ICO's guidance. [\[S48\]](#)
- ☐ We know where the supplier stores our data, and who can see it.
- ☐ We have checked whether the DSPT applies. [\[S47\]](#)
- ☐ If the tool is a digital health technology, the supplier can give us a completed DTAC form. [\[S27\]](#)

Watch out

The ICO notes that its DPIA guidance is under review following the Data (Use and Access) Act. [\[S48\]](#) Check the latest version before you rely on it.

Accessibility

- ☐ The supplier says the tool meets WCAG 2.2 AA, and can show how.
- ☐ We have tried it with a keyboard and on a phone.
- ☐ Staff and clients with access needs can use it.

Integration and a single source of truth

The UK government's Technology Code of Practice is written for public sector projects, but its points are good tests for any organisation, including "Make use of open standards" and "Integrate and adapt technology". [\[S44\]](#)

- ☐ We know where each important piece of information will live.
- ☐ The tool connects to the systems we already rely on, or we know how it will.
- ☐ Information is entered once, not copied between systems.

Exit, data export and ownership

- ☐ We can export all our data in a standard format, at any time.
- ☐ The contract says we own our data.
- ☐ We know what happens to our data if we leave.

Training and support

- ☐ Training is included, and works for new starters as well as the first team.

☐ We know how to get help, and how quickly it comes.

Total cost

☐ We know the full cost: licences, set up, training, support and the cost of leaving.

☐ We know how the price changes as we grow.

A one page scoring sheet

Score each product from 1 to 5 on each line below, with the people who will use it. Talk about any line where scores differ widely.

1. Fits the job and the workflow
2. Meets our must haves
3. Data protection and security
4. Accessibility
5. Integration
6. Exit and data export
7. Training and support
8. Total cost

Sources

1. **[S48]** Information Commissioner's Office, Data Protection Impact Assessments (DPIAs), marked as under review following the Data (Use and Access) Act. <https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/accountability-and-governance/data-protection-impact-assessments-dpias/>
2. **[S44]** Government Digital Service and Central Digital and Data Office, The Technology Code of Practice, last updated 7 July 2025. <https://www.gov.uk/guidance/the-technology-code-of-practice>
3. **[S27]** NHS England Digital, How Digital Technology Assessment Criteria (DTAC) works, last edited 21 September 2026. <https://digital.nhs.uk/services/digital-technology-assessment-criteria-dtac/how-dtac-works>
4. **[S47]** NHS England, Data Security and Protection Toolkit. <https://www.dsptoolkit.nhs.uk/>

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About Caresque

Strategy, product design and digital delivery, with specialist knowledge of the NHS and social care.

Talk to Caresque

Tell us where you are and what you need. A free discovery call is the easiest way to find out whether we can help.

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