



EHR Evaluation Checklist

This checklist will help you think about what you need from an EHR. Use this or create your own to help you decide which features are crucial to your practice.

HINT: SimplePractice checks all the boxes! [Try it free for 30 days.](#)

Scheduling

- New and existing clients can request appointments online
- Set recurring appointments
- Easily manage no-show and cancellations
- Schedule a telehealth appointment
- Sync my EHR calendar with my Google Calendar, Outlook or iCal

Customization

- Customize paperwork, documents, progress notes, and templates
- My logo can be added to billing documents

Client Communication

- Clients can fill out paperless intakes and sign consent forms online
- Clients can access documents and billing online
- Securely message my clients directly

Billing

- Billing is integrated into the system
- Easily create and share Invoices, Statements, and Superbills
- File insurance claims electronically
- Fees for insurance claims and ERAs are within my budget
- Store credit cards on file and set up autopay

Mobile App

- Access my schedule, notes, reminders, and billing
- Securely send and receive messages from clients using a mobile app
- Access telehealth from our phone, tablet, or computer

Support

- Detailed articles and videos can be easily found in a help center for quick answers
- Live classes, demos, and screen shares where I can ask questions and learn from a product specialist
- Online community of customers that I can bounce questions and ideas off of and network with

Cost

- Fees for office staff and additional clinicians are within my budget
- No hidden fees for the main features
- Total costs are less than 1% of my income