Choosing an EMR for a growing clinic. *The checklist.*

Bring this to each demo. Tick each item only when you have seen it working, not just heard it described. Name each option below and compare them side by side.

OPTION A	OPTION B	OPTION C

SEEN WORKING IN THE DEMO	A	B	C
Your growth plan			
Adding a physician: schedule, role, billing and follow-up set up in the system	☐	☐	☐
Part-time and locum coverage	☐	☐	☐
A second location seeing the same patients, with one shared record	☐	☐	☐
The visit			
One complete visit, from the note to the signed paperwork	☐	☐	☐
Requisitions, prescriptions, referrals and forms prepared from the plan	☐	☐	☐
Results, referrals and follow-ups with a clear owner	☐	☐	☐
The whole encounter on a phone or tablet	☐	☐	☐
Scheduling and the front desk			
Provider schedules, visit lengths and appointment types you shape yourself	☐	☐	☐
Online booking and patient reminders	☐	☐	☐
Pre-visit intake, self check-in and health-card capture flowing into the visit	☐	☐	☐
Team access and record-keeping			
Roles for reception, billing, clinicians and administrators	☐	☐	☐
A unique login for every user	☐	☐	☐
Access added for a new hire and removed the day someone leaves	☐	☐	☐
An audit trail showing who viewed and changed a chart, and when	☐	☐	☐
Original content preserved when an entry is changed	☐	☐	☐
Each patient's record displayed and printed in chronological order	☐	☐	☐
Automatic backup and recovery	☐	☐	☐
Locations, billing and reporting			
Each location's schedule, team and workflows	☐	☐	☐
Billing built from the encounter, with claims followed to payment	☐	☐	☐
Private-pay invoices and online payments	☐	☐	☐
Visit volume and capacity by provider and location	☐	☐	☐
Collections and outstanding balances by provider and location	☐	☐	☐
Your records and your team			
Your charts, documents, forms and letterhead brought across	☐	☐	☐
Training for each role, and for new staff later	☐	☐	☐
A clear way to get help	☐	☐	☐