Rubric for Evaluating and Choosing an EHR

Healthie

01 Core Functionality

These are the non-negotiables you need for day-to-day operations.

Weight

HIGH

Checklist

- ○ Scheduling & calendar management
- ○ Charting / documentation
- ○ Client portal
- ○ Secure messaging
- ○ HIPAA-compliance & data security
- ○ Billing & claims (insurance and/or private pay)
- ○ Telehealth capabilities (if relevant)

Evaluation Tip

Rank each feature on a **1–5 scale** for how intuitive and complete it feels. Don't just check the box — ask: "Would I actually want to use this every day?"

02 Practice Growth & Efficiency

Features that support growth, scale, or better client engagement.

Weight

MEDIUM-HIGH

Checklist

- ○ Client onboarding automations (forms, consents, workflows)
- ○ Outcome tracking or goal-setting tools
- ○ Group sessions / programs support
- ○ Payment plans & recurring billing
- ○ Custom branding
- ○ Treatment plan templates
- ○ Multi-provider support

Evaluation Tip

Consider your practice in 6–12 months. Will this EHR help you grow into your future needs?

03 Integrations & Ecosystem

Look at how well the EHR fits into the rest of your tech stack.

Weight

MEDIUM

Checklist

- ○ Calendar sync (Google, iCal)
- ○ E-prescribe integrations
- ○ Labs, fax, or other clinical integrations
- ○ Clearinghouse integrations (Office Ally, Claim.MD)
- ○ Marketplace of vetted partner tools

Evaluation Tip

Even if you're not using these now, future-proof your setup with tools that **play well with others**.

04 Support & Community

How helpful is the company beyond the software?

Weight

MEDIUM

Checklist

- Live chat or email support
- Help docs and training library
- Webinars or onboarding calls
- Community / peer support network
- Dedicated account rep (for larger practices)

Evaluation Tip

Test their support team before buying. How fast and thoughtful is their response?

05 Pricing & Flexibility

Transparency and value for money.

Weight

MEDIUM-LOW

Checklist

- Monthly vs. annual pricing
- Add-on fees (extra providers, claims, support seats)
- Free trial or demo available
- Easy cancellation or downgrade options
- Scalability with your practice size

Evaluation Tip

Make sure you're comparing total cost of ownership, not just sticker price.

Final Step
Build a Comparison Table

Use a table or spreadsheet to score each EHR across these categories (1–5 or color code). Tally the weighted scores and review them side-by-side.

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