



# The Ultimate EHR Selection Checklist

The Shortlist of Features You Need for Your Practice



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Selecting an electronic health records (EHR) platform for your medical practice is a serious decision. After all, an EHR impacts every aspect of your practice, from appointment scheduling and clinical notes to medical billing. Ensuring you make the right decision requires a disciplined approach to analyzing EHR features and functionality. Use this checklist to take the pain out of selecting the right EHR for your practice.



## Meaningful Use

- **Ensure that your EHR solution is Meaningful Use Stage 1 and 2 Certified.**

Selecting an EHR that is certified for Meaningful Use will allow you to qualify for the Meaningful Use Incentive program. If you are a provider leaving an uncertified EHR or starting from scratch, you can start the next reporting period to avoid penalties. For providers that are leaving a certified EHR, you can combine your data to attest for the current reporting period.



## Workflow Customization

- **Your EHR should be able to be customized to your work style and practice.**

Ensure that your EHR lets you customize your workflow with customizable clinical forms and medical templates. Some EHRs position themselves as built for a specialty but don't offer flexibility while others build custom templates for new clients to make sure your EHR is ready to use from day one.



## Cloud-Based Mobile EHR

- **Maximize your medical practice's flexibility with a cloud-based, mobile electronic health record software that works on iPhone, iPad or web.**

An EHR app allows you to utilize iPad features like the built-in camera, free draw tools, medical speech-to-text dictation and more. A mobile EMR can also help you build a more personal connection with patients. Additionally, web capabilities should offer full administrative access for your staff who may use a laptop or desktop. Because the software would be cloud-based, you can do all of this securely from anywhere.



## Patient Portal

- **Your EHR should provide you with a patient-friendly portal.**

Your EHR should provide patients with a one-stop portal where they can manage essential aspects of their medical experience. This includes the ability to book appointments online, access their medical records & test results and securely message their physician. The patient portal can also streamline scheduling and patient education processes.



## Integrated eRX, Labs and Referrals

- An EHR should allow you to seamlessly refer, order labs and write prescriptions.

eRX, labs and referrals must be integrated into your EHR to create a paperless solution that easily fits in your workflow. Lab and prescription capabilities must be integrated with best-in-class systems, like LabCorp, Quest and SureScripts, to provide patients with a plethora of options.



## Real Time Eligibility and Medical Billing

- Your EHR should provide you with real time eligibility checks so you know your patients' insurance status in seconds.

In addition to Real Time Eligibility checks, the best EHRs should allow you to bill straight from the platform. Ensure that your EHR is integrated with a top tier clearing house, like TriZetto. Your billing dashboard should include easy access to reports like real time claims, denial analysis and HCFA reporting. If you are looking for fully-managed billing services, or revenue cycle management (RCM), check to see if your EHR offers managed billing services.



## Patient Check-In

- Your EHR should provide you with a clipboard free way to check-in your patients.

An EHR should provide you with a comprehensive check-in solution; ideally, the check-in solution is a native iPad app that allows your staff to simply hand an iPad to patients for a seamless check-in experience. Patients should even be able to complete an online check-in process on their way to the appointment if they would like. Additionally, all input data should easily sync with the patient's EHR record upon approval from your front-desk staff.



## Advanced Clinical Features for Efficiency

- An EHR should offer time saving tools like medical speech-to-text, appointment profiles and macros.

Time saving tools like macros, appointment profiles and medical speech-to-text should be easy to set up and use across your EHR. For instance, medical speech-to-text should allow you to take clinical notes easily by voice and adapt to any accent or speech style. Other tools like free draw will allow you to annotate directly onto clinical images on your iPad to improve the effectiveness and efficiency of your charting.



## Data Flexibility & Portability

- Your EMR solution should provide you with unlimited storage, seamless backup and ultimate data portability.

An EHR integrated with a HIPAA-compliant cloud storage system, like Box, allows doctors to sync and back-up files easily between their EHR and the Cloud. Additionally, doctors can safely share files with colleagues and patients. Finally, an EHR should onboard your existing data; similarly, if you choose another solution, you should be able to take your data with you.



## Third Party Integrations Through an FHIR API

- An EHR with an open and secure FHIR API can round out your platform by integrating third party solutions.

The possibilities are nearly endless in an EHR with a well developed API. You can integrate partner applications for things like scheduling, reputation management and more, or if you're a particularly tech savvy organization, you can develop unique solutions on the API for your practice. An FHIR API is perhaps the best way to round out your EHR's capabilities.



## Native Telehealth Software

- Because telehealth is here to stay, your EHR should have a solution for telemedicine encounters.

Telemedicine has become an essential part of healthcare for many providers. Therefore, you should not have to worry about switching across multiple applications to access telehealth visits. Instead, find an EHR with native telehealth software that enables you to view and edit the patient's note without exiting the video visit.



## Structured EHR Implementation Process

- Clearly structured EHR implementation is the foundation of a positive experience with your platform; make sure your vendor has an effective process.

The implementation stage is a crucial but often overlooked piece of the EHR selection process. If your EHR vendor lacks an effective implementation process, you will be struggling from the start. That's why you must make sure that your chosen EHR company has a clearly structured implementation process with training modules, guidance and a library of support articles and videos, so your practice can start strong with the platform.

“ I believe my responsibility as a physician is to purvey the best information to my colleagues which is why I tell people that DrChrono is so much easier to use than other EHRs I've come across. It's incredibly intuitive which is key because the less interaction I have with your EHR to create well crafted documentations of my experience with the patient, the better off I am as a practitioner. ”

- Dr. Ali Sadrieh, Foot Surgeon and DrChrono user

## About DrChrono

Interested in an EHR that meets all of your top requirements? DrChrono meets the needs of tens of thousands of physicians with over 32 million patients in our system.

In fact, DrChrono's EHR was voted #1 mobile EHR 9 years in a row (2013 - 2021) by Black Book, and our FHIR API won a 2022 DEVIES Award!

If you're ready to spend less time in your EHR and more time with your patients, [schedule a demo](#) with one of our product experts to learn how DrChrono can get you there. We would love to tell you more about our solution and how you can customize it to meet the needs of your practice.



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