

Practice Management Checklist For Group Practices

Use this checklist to compare your practice needs to what practice management systems offer. Extra space is included for your own notes.

Practice Management System: _____

I NEED IT OFFERS

BASICS

<input type="checkbox"/>	<input type="checkbox"/>	Group practice capabilities
<input type="checkbox"/>	<input type="checkbox"/>	Scheduling capabilities
<input type="checkbox"/>	<input type="checkbox"/>	Admin/Biller account
<input type="checkbox"/>	<input type="checkbox"/>	Intern account
<input type="checkbox"/>	<input type="checkbox"/>	Mobile app
<input type="checkbox"/>	<input type="checkbox"/>	Helpful support team and video support
<input type="checkbox"/>	<input type="checkbox"/>	Credit cards can be saved and charged (fee)
<input type="checkbox"/>	<input type="checkbox"/>	Its HIPAA compliant
<input type="checkbox"/>	<input type="checkbox"/>	Email appointment reminders (free or not)
<input type="checkbox"/>	<input type="checkbox"/>	Text or voice appointment reminders (free or not)
<input type="checkbox"/>	<input type="checkbox"/>	Price per clinician _____
<input type="checkbox"/>	<input type="checkbox"/>	Price for text or voice reminders: _____
<input type="checkbox"/>	<input type="checkbox"/>	Ability to use system on phones, iPad, non computer
<input type="checkbox"/>	<input type="checkbox"/>	Policy on transferring client data if you leave
<input type="checkbox"/>	<input type="checkbox"/>	Clearinghouse used: _____
<input type="checkbox"/>	<input type="checkbox"/>	Ability to bill under multiple locations
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	

SCHEDULING

<input type="checkbox"/>	<input type="checkbox"/>	Ability to schedule appointment
<input type="checkbox"/>	<input type="checkbox"/>	Ability to have an intake account that's free
<input type="checkbox"/>	<input type="checkbox"/>	Master schedule to see everyone's appointments
<input type="checkbox"/>	<input type="checkbox"/>	Can clients see clinician's schedule online?
<input type="checkbox"/>	<input type="checkbox"/>	Ability to sync calendar with other applications
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	

CLIENT PORTAL

<input type="checkbox"/>	<input type="checkbox"/>	Client portal option available
<input type="checkbox"/>	<input type="checkbox"/>	Clients can see and pay their balances on portal
<input type="checkbox"/>	<input type="checkbox"/>	Clients can schedule or cancel appointment on portal
<input type="checkbox"/>	<input type="checkbox"/>	Clinicians can disable portal features if desired

<input type="checkbox"/>	<input type="checkbox"/>
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<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Credit cards can be saved
Client intake packet in portal

BILLING AND ACCOUNTING

<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
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Ability to send insurance claims electronically (free or not)
Ability to have ERA (free or not)
ERA auto-posting (free or not)
Clinician commission tracking
What reports do they have (aging report, note count...)
Price for claims: _____
Price for ERA: _____
Ability to bill as supervisor
Ability to bill groups
Ability to create superbill
Ability to send out of network claims
Ability to disable features for clinicians (like billing)
Can customize client superbills and statement

NOTES

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Progress notes and treatment plans available
Ability to customize notes
Get notification to update treatment plans
To do list
Get notification to do a progress note
Customizable notes
Customizable treatment plans