

Selecting a new Electronic Health Record (EHR) system is **one of the most consequential decisions** your organization will make. The right EHR can transform how your team delivers care by streamlining documentation, reducing billing errors, improving compliance, and giving leadership the data they need to make smarter decisions. The wrong one can do the opposite.

This checklist is designed to help you evaluate EHR platforms against the criteria that matter most in home health, hospice, and behavioral health settings. As you review each vendor, use the scoring column to rate how well their system meets each requirement — from 1 (poor) to 5 (excellent). When you're done, tally your score to see where each platform stands.

Keep in mind: this checklist is a starting point, not a finish line. The EHR that earns the highest score on a generic rubric may still not be the best fit for your organization's specific workflows, patient population, payer mix, or growth plans. That's why the most successful EHR transitions don't start with a product demo; they start with a deep understanding of **who you are** and **what you need**.

HOW TO USE THE SCORING SYSTEM

Rate each criterion from **1 to 5** based on your evaluation of the vendor's offering:

- 1** *Does not meet the requirement*
- 2** *Partially meets it*
- 3** *Adequately meets it*
- 4** *Meets it well*
- 5** *Exceeds expectations*

Complete this checklist for each EHR you are evaluating and compare totals.
A maximum score of 50 points is possible.

CRITERIA
Score (1–5)

CLINICAL WORKFLOW & USABILITY		Poor —→ Excellent
Workflow Alignment: The system supports your clinical workflows without requiring staff to adapt their process to the software.		1 2 3 4 5
Ease of Use: The interface is intuitive enough for clinical staff to adopt quickly, with minimal disruption to productivity.		1 2 3 4 5
COMPLIANCE & REGULATORY READINESS		
Regulatory Updates: The system is updated regularly to reflect the latest CMS requirements or state-specific regulations.		1 2 3 4 5
BILLING & REVENUE CYCLE		
Billing & Claims Management: Clinical documentation flows seamlessly into billing, and the system supports efficient claims submission, tracking, and denial management across your payer types.		1 2 3 4 5
REPORTING & ANALYTICS		
Operational Reporting: You have access to real-time dashboards and reports that give leadership visibility into performance, outcomes, and productivity.		1 2 3 4 5
Quality & Outcomes Tracking: The system tracks quality metrics and outcome data relevant to your accreditation and value-based care requirements.		1 2 3 4 5
IMPLEMENTATION & TRAINING		
Onboarding & Training: The vendor provides robust implementation resources, go-live support, and training programs to get your team up to speed.		1 2 3 4 5
Data Migration Support: The vendor has a documented, tested process for migrating your existing patient data accurately and securely.		1 2 3 4 5
INTEROPERABILITY & INTEGRATION		
Data Exchange: The system can exchange data with hospitals, referral sources, payers, and other care partners via HL7/FHIR standards.		1 2 3 4 5
INNOVATION & AI CAPABILITIES		
AI Capabilities: The system offers AI-driven features, such as automated documentation, predictive analytics, clinical decision support, or intelligent scheduling, that could meaningfully improve efficiency and outcomes for your organization.		1 2 3 4 5
TOTAL SCORE (50 points possible)		____ / 50

SCORE INTERPRETATION GUIDE

45 – 50 <i>Excellent Fit</i>	35 – 44 <i>Strong Candidate</i>	25 – 34 <i>Needs Evaluation</i>	Below 25 <i>Reconsider Options</i>
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Note:

We recommend completing this checklist independently for each EHR under consideration and comparing scores side by side. Involve key stakeholders (clinical, operational, billing, and IT) in the evaluation for a more complete picture.

ONE SIZE DOES NOT FIT ALL

No two healthcare organizations are the same, and no generic checklist can fully capture what your organization needs. A small rural hospice has different priorities than a large multi-site home health agency. A behavioral health provider operates under entirely different documentation and compliance requirements than a skilled nursing facility. The EHR that earns the highest score today might still not be the right fit for how your team works, who you serve, or where you're headed.

That's why the organizations that make the most successful EHR transitions don't rely on a checklist alone, they **rely on experienced guidance**. At SimiTree, we start every EHR engagement not with a product comparison, but with a thorough understanding of your organization. We learn your workflows, your pain points, your goals, and your team before we ever start evaluating platforms. That means every recommendation we make is grounded in your reality, not a vendor's pitch.

We can help you find the perfect EHR that fits the needs of your practice.

From selection and implementation to optimization and beyond — SimiTree is your partner at every step. Our consultants bring hands-on expertise across the leading EHR platforms in home health, hospice, and behavioral health so you can switch with confidence.

Ready to find your fit?

GET STARTED

