

Beyond the Demo

A Checklist for Evaluating Behavioral Health EMRs

Every EMR looks capable in a demo. Use these questions to dig deeper and evaluate how a system performs where it matters most.



Clinical Documentation

Was the system built for behavioral health, or adapted to it?

Ask to see group documentation, level-of-care transitions, and treatment plan reviews using workflows that reflect your organization.

Can the system connect the full clinical story?

Follow the path from assessment to treatment plan, progress note, and claim. Your team shouldn't have to maintain those connections manually.

How does the system handle Part 2 data?

Watch consent capture, segmentation, redisclosure, and consent revocation in action.

Is the audit trail easy to access?

Ask your vendor to pull an audit trail and generate a survey-ready documentation packet during the demo.



Revenue Cycle

What's the vendor's clean claim rate?

Ask for results from organizations like yours, segmented by payer mix and level of care.

Where does the claim originate?

Understand how documentation flows into billing and where information can be lost along the way.

What happens after a denial?

Review worklists, appeal tracking, and reporting that help identify root causes.

Can the vendor demonstrate real performance?

Request live customer metrics, including days in A/R, days to bill, and denial trends.



Data & Contracts

Who owns your data?

Look for a clear answer in the contract—not a verbal promise.

Is the system certified for EHI export?

Confirm certification and understand what's included in an export.

What does it take to leave?

Review export format, timeline, fees, and any contractual limitations before signing.

How is your data migrated and protected?

Ask how historical records are preserved during migration and where your data is stored once you're live.

Before You Decide

If a vendor can't answer these questions clearly, or can't demonstrate the answer during your evaluation, you've learned something important.

You can only trust what you can verify.

These questions are designed to guide your evaluation. For a deeper look at why they matter, what evidence to request, and what to watch for along the way, download **The EMR Trust Test**.

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