

EHR Evaluation Scorecard

A side-by-side framework for comparing behavioral health EHR platforms before starting a trial.

Use this scorecard while you research, demo, and trial each EHR you're considering. Score every criterion from 1 to 5 (1 = doesn't meet this need, 5 = exceeds expectations). If a criterion doesn't apply to your practice — CARF documentation if you're not accredited, for example — leave it blank and subtract 5 from that category's maximum instead of scoring it a 1.

Platforms being compared:

Platform A: _____ Platform B: _____

Platform C: _____

Evaluation Criteria	Platform A	Platform B	Platform C
Clinical Documentation (max 20 pts)			
Behavioral-health-specific note templates			
Templates customizable without developer help			
Reasonable time-to-complete a note			
Covers all your note types			
Category Subtotal (max 20)			
Billing and Insurance (max 20 pts)			
Native behavioral health CPT code support			
Automated ERA/EOB processing			
Acceptable denial-rate track record			
Medicaid/Medicare billing support			
Category Subtotal (max 20)			
Compliance and Security (max 20 pts)			
ONC certified under Cures Edition criteria			
Detailed, accessible audit trail			
HIPAA-compliant messaging and document storage			
CARF/Joint Commission documentation support (if applicable)			
Category Subtotal (max 20)			
Scheduling and Practice Management (max 15 pts)			
Group therapy scheduling (recurring groups)			
Recurring appointments, reminders, no-show tracking			

Evaluation Criteria	Platform A	Platform B	Platform C
Self-service patient portal			
Category Subtotal (max 15)			
Implementation and Support (max 20 pts)			
Structured onboarding plan			
Dedicated implementation contact			
Clear post-go-live support path			
Realistic time-to-live for your practice size			
Category Subtotal (max 20)			
Demo and Trial Results (max 20 pts)			
Documentation workflow held up under a real note			
Billing process was transparent, not deflected			
Support responded usefully and on time			
No unresolved red flags			
Category Subtotal (max 20)			
TOTAL SCORE (max 115)			
STRONG FIT	SOLID FIT	NEEDS SCRUTINY	
100-115	70-99	Below 70	

A high score doesn't replace the trial — it tells you which platforms have earned one.

Treat as deal-breakers, regardless of total score:

- Billing that needs third-party workarounds (spreadsheets, bolted-on clearinghouses, manual claim scrubbing)
- Note templates that need heavy customization just to be clinically usable
- Vague answers about data migration or contract exit terms
- Support only available by ticket, with no path to a live person during go-live

Notes

Use this space for anything that didn't fit neatly into a score — things you noticed in a demo, follow-up questions for a vendor, or details to compare later.

Once you've scored your shortlist, [start a free trial with ICANotes](#) and run it against this exact scorecard.