



Practice Technology Checklist

A practical review for independent medical practices - designed to surface friction, risk, duplication, and underused capability before you buy anything new.

Use this checklist with your practice manager, clinical lead, and whoever owns day-to-day technology decisions. Check what is true today; circle the items that deserve attention first.

Workflow & Operations

- Staff can complete common workflows without duplicate data entry across multiple systems.
- Scheduling, intake, documentation, billing, and follow-up handoffs are clearly defined.
- Workarounds, spreadsheets, sticky notes, and manual re-entry are tracked and reviewed.
- Technology changes are evaluated against actual workflow impact, not feature lists alone.
- The practice knows which recurring tasks consume the most staff time each week.

Systems & Integration

- Each major system has a clear business purpose and an accountable owner.
- Interfaces/integrations are documented, monitored, and have a known support path.
- The practice knows where the same patient or operational data is maintained in more than one place.
- Unused modules, licenses, devices, or subscriptions are identified at least annually.
- Current systems are configured around the practice, rather than forcing unnecessary process changes.

Security, Access & Continuity

- User access is role-based and removed promptly when staff leave or change roles.
- Multi-factor authentication is enabled wherever practical for sensitive systems.
- Backups and recovery responsibilities are understood, including what vendors do and do not cover.
- The practice has a documented response path for outages, cyber incidents, and critical vendor failures.
- Shared credentials and unmanaged administrator accounts are minimized.

Vendor & Cost Management

- Renewal dates, contract terms, notice periods, and termination requirements are tracked.
- The practice can explain total cost, including implementation, support, interfaces, training, and add-ons.
- Vendor support performance is measured against actual response and resolution experience.

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- New purchases require a defined problem, desired outcome, and accountable decision owner.
 - Optimization of current tools is considered before replacement.
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Priority Action Plan

Priority	Why it matters	Owner / next step
1		
2		
3		

Priority next step: Choose the three unchecked items that create the most operational friction or risk. Define the business outcome you want before evaluating a new product or vendor.

Review cadence: Revisit this checklist at least annually, and again before a major system purchase, renewal, or practice expansion.

Notes / Observations
