# Switching software: moving essentials checklist

**Thinking of moving from your current software?
We asked clinic professionals what their top requirements
were so you don't have to.**

## Set Up Costs

- ☐ Account set up essentials are included in the cost of my subscription

- ☐ I have options to bring over my current patient data

- ☐ There's a dedicated team to help import my existing data

- ☐ Self-serve resources and live support are available to help me get started

- ☐ There are options for paid, full-service set up

## Support

- ☐ Support is included at no additional cost

- ☐ There are multiple support channels (email, chat, phone) that allow me to speak to a human

- ☐ There are resources (videos, guides, webinars) to help me learn about new features on my own time

- ☐ There's a community or forum of professionals I can turn to for advice

## Budget

- ☐ I'm not being locked into a contract or up-sold with promotional pricing

- ☐ Staff members that don't see patients can be added with no extra cost (front desk, billers, etc.)

- ☐ Key features, like text reminders or email notifications, are not an additional or per-use cost

- ☐ I can pay for my monthly usage in under 3 sessions

## Security, Privacy, & Compliance

- ☐ Their Terms Of Service are clear, compliant, and easy to understand

- ☐ I can confirm I'm in control of my data

- ☐ My core regulatory compliance needs are met (HIPAA, PIPEDA/PHIPA, GDPR)

## Booking & Scheduling

- ☐ Automatic reminders for appointments and pre-appointment paperwork are included

- ☐ I can manage no-shows, cancellations, and waitlists

- ☐ I can offer online or virtual appointments

## Customization

- [ ] I can create a variety of appointment types

- [ ] I can create a variety of different automated patient forms

- [ ] I can bill and collect payments in ways that work for my business

- [ ] I can customize the language and design in patient-facing areas, like an online portal or email, to fit my practice's tone and branding

## Documentation

- [ ] I can complete my daily notes quickly and easily see any appointments I haven't charted on

- [ ] I can send intake forms and outcome measure forms via email

- [ ] I can easily track and manage billing information in each client's profile, as well as on a practice-wide level

## Billing & Payments

- [ ] I have access to integrated payments to accept payments, prevent no-shows, and collect any outstanding fees

- [ ] I have access to integrated insurance billing and/or features to help my patients get reimbursed by insurance

## Billing and Payments (cont'd)

☐ I have access to reports to help me understand the financial health of and make decisions for my business

☐ I have the option to manage payments online or in person via terminal

---

**Switching software feels daunting but it went so seamlessly for us. Worth it!**

- Sarah Wells, Office Manager with Jane

**IN CASE YOU'RE CURIOUS**

Jane meets all these clinic-recommended criteria, and we're happy to help figure out the next steps for your clinic!

[f] [in] [◉] [▶] @janerunsclinics