CHIROPRACTIC SOFTWARE DEMO
CHECKLIST ⬅

BEFORE THE DEMO

- ☐ List must-have vs. nice-to-have features
- ☐ Identify daily pain points (e.g., SOAP notes, reactivating patients, billing, payment processing, etc.)
- ☐ Involve front desk, billing, associate doctors, or other providers
- ☐ Prepare practice-specific questions (cash vs. insurance, PI vs auto accident, mobile needs, etc.)
- ☐ Review vendor reputation (Capterra, G2, Google reviews)

DURING THE DEMO

User Interface & Mobility
- ☐ Is the software easy to use and navigate?
- ☐ Does it work well on desktop, tablet, and Mac computers?
- ☐ Can providers access the schedule or notes on the go?

Scheduling & Appointments
- ☐ Can patients book online?
- ☐ Are recurring appointments, waitlists, and provider calendars supported?
- ☐ Are appointment reminders automated via text/email?

SOAP Notes & Documentation
- ☐ Are templates customizable by chiropractic technique (e.g.,
- ☐ Diversified, Gonstead)?

  Are macros/smart phrases supported?
- ☐ Can treatment plans and documentation be reused or modified?

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DURING THE DEMO

Billing & Payment Processing

- ☐ Is insurance billing built-in with clearinghouse integration?
- ☐ Does it handle claim scrubbing, ERA/EOB posting, and rejections?
- ☐ Can patients pay via text, email, or patient portal?
- ☐ Are card-on-file, payment plans, and membership tracking available?

Patient Communication & Engagement

- ☐ Does it include 2-way texting and email communication?
- ☐ Can you send broadcast/bulk messages to specific patient groups?
- ☐ Does it support automated patient recall (missed or dropped-off patients)?
- ☐ Are online review requests triggered after visits?

Reporting & Analytics

- ☐ Can you track revenue, AR, cancellations, patients, payments, appointments, and provider productivity?
- ☐ Are custom reports available for services, patients, providers, or payers?

Integrations & Data Migration

- ☐ Does it integrate with payment gateways, email tools, or imaging systems?
- ☐ Can existing patient data be imported easily?
- ☐ Is there a data export option if you leave the platform?

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DURING THE DEMO

Training & Support

- ☐ Is onboarding included (live or recorded)?
- ☐ What are the support hours and channels (phone, chat, email)?
- ☐ Are help guides, webinars, or ongoing training available?

AFTER THE DEMO

Review internally, test functionality, and compare options.

- ☐ Score each area (1–5) and total the score
- ☐ Collect team feedback and red flags
- ☐ Review plans, pricing, and support

📣 **Pro Tip**

Use this checklist to compare chiropractic EHR software vendors side-by-side. A well-documented demo process helps you avoid costly mistakes and ensures you choose the best chiropractic software for your practice.

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