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Your Skill-Building EMR

Replacing a Therapy EMR:
A Guide to Making an Informed Decision

How to Assess, Select, and Implement the Right Therapy EMR for Your Organization

"Did you know? Over 60% of therapy providers say their EMR lacks flexibility, increasing admin burden and therapist frustration."

Content

Dear Therapy and Rehab Leaders,

Transitioning to a new Therapy EMR is a big decision—one that impacts workflows, efficiency, and patient care. We've seen firsthand the challenges therapy teams face when making this switch. Over the past 12 months, we've onboarded over 150 buildings, learning what works, what doesn't, and what truly makes a difference.

We wrote this guide to share that knowledge. At RESTORE-Insights, we believe in transparency and collaboration. We don't just provide software—we're here to be a trusted partner in helping therapy teams work smarter, document more efficiently, and focus on what matters most: patient care.

We hope this guide helps you navigate your journey. If you'd like to discuss your specific needs, we're here to help.

Eran Arden
CEO, RESTORE-Skills

Why Many Therapy Providers Are Replacing Their EMR?

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Therapy providers aren't alone in seeking better technology. Across healthcare, organizations are moving away from legacy EMR systems—platforms that once served their purpose but no longer keep up with today's needs. In hospitals, outpatient clinics, and specialty care, teams are upgrading to more flexible, efficient, and user-friendly solutions that support better workflows and collaboration. Therapy teams are part of this shift. As the need for seamless documentation, real-time data access, and smooth system integration increases, more providers are choosing EMRs that truly work for them.

"73% of healthcare organizations still operate legacy systems, which are costly to support and hinder efficiency."
healthcareitnew

Common Pain Points with Legacy EMRs:

- **System Performance Issues** – Slow load times, freezing, and lost documentation disrupt daily workflows.
- **Inefficient Documentation** – Rigid, outdated workflows increase administrative time for therapists.
- **Integration Gaps** – Many EMRs don't have LIVE API sync with facility systems, leading to double documentation.
- **Vendor Support Limitations** – Long response times and lack of proactive customer service impact operations.
- **Compliance & Reporting Challenges** – Limited automation makes tracking therapy minutes and outcomes more difficult

Key Factors to Consider When Evaluating a Therapy EMR

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↘ What Matters Most in a Modern Therapy EMR?

Choosing the right Therapy EMR is a critical decision that impacts clinical efficiency, data accuracy, and operational success. A modern EMR should do more than just store documentation—it should simplify workflows, improve compliance, and integrate seamlessly with facility systems.

Therapy providers who transition to a new EMR often cite the need for better flexibility, automation, and real-time data access. The right platform should reduce administrative work, not add to it.

↘ Key Considerations When Choosing a Therapy EMR:

- **System Performance & Reliability** – The system should be fast, stable, and responsive with real-time auto-save to prevent data loss.
- **Customizable Documentation –** Structured and free-text options should allow therapists to document efficiently without unnecessary clicks.
- **Seamless Integration** – A LIVE API sync with facility EMRs eliminates double documentation and streamlines data exchange.
- **Automation & AI Capabilities** – Smart workflows, AI-generated progress notes, and real-time tracking reduce manual workload.
- **Training & Support** – Access to 24/7 AI support chat, Live support during US work hours - so your team doesn't need to wait! A dedicated Clinical Success Manager, and on-platform training tools.
- **Development Flexibility** – The ability to tailor the system to your needs with a dedicated development team and clinical product experts ensuring quick turnaround times for enhancements and workflow adjustments.
- **Contract Flexibility** – Transparent pricing with month-to-month agreements, not restrictive long-term contracts.

The Bottom Line: A modern Therapy EMR should work for your team, not against it. By focusing on speed, flexibility, and seamless integration, you can improve efficiency and patient care.

Customizable Documentation:
Your EMR Should Adapt to Your Workflow, Not the Other Way Around

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Why It Matters?

Every Skilled Nursing Facility (SNF) operates under unique documentation requirements based on state regulations, payer policies, and facility workflows. Yet, many EMRs offer rigid, one-size-fits-all templates, forcing therapy teams to work around the system instead of having a system that works for them.

A modern Therapy EMR should be fully configurable, allowing SNFs to define, structure, and customize documentation to meet clinical, operational, and compliance needs without extra steps or unnecessary workarounds.

A multi-facility SNF group provides therapy services for Medicare, Medicaid, and managed care patients, each requiring different levels of detail and reporting. A rigid EMR forces all therapists to use the same structured format, even when not needed, leading to:

- *Extra documentation steps for payers that allow flexibility.*
- *Compliance risks if documentation doesn't meet Medicare's strict guidelines.*
- *Frustration and inefficiency for therapists spending more time on paperwork.*

With a flexible EMR, the SNF can:

- **Customize documentation template**s based on payer and facility policies
- **Define structured or free-text workflow**s for different cases
- **Adjust documentation fields and compliance requirements** without relying on long deployment time on the vendor's end

When choosing an EMR, make sure it provides:

- **Configurable documentation** templates to match compliance requirements.
- **Custom workflows** to align with SNF therapy processes.
- **The ability to mix structured and free-text documentation**.
- **Adaptive forms** that adjust based on treatment progress.
- **Quick modifications** without a long waiting period.

The Bottom Line: Your documentation should match your SNF's workflow—not force you into unnecessary steps. The right Therapy EMR provides the flexibility to align with your needs.

Training & Support:
Your Team Shouldn't Have to Wait for Help

Why It Matters?

In your facilities, therapy teams work in fast-paced environments where documentation, billing, or compliance delays can impact patient care and reimbursement. Yet, many Therapy EMRs offer slow, unresponsive support, leaving teams stuck with long wait times, unresolved issues, and minimal training.

A modern Therapy EMR should provide immediate access to help, whether it's live support, AI-powered assistance, or a dedicated Clinical Success Manager who understands SNF operations. Training should be built into the platform, ensuring new users can get started without lengthy onboarding processes.

A large SNF group experiences a critical documentation issue where therapists can't finalize progress notes due to a system error. With a traditional EMR vendor, they:

- *Wait 24+ hours for a support ticket response*
- *Have no direct contact with a success manager for urgent escalations.*
- *Struggle to find self-help resources to resolve the issue.*

With a flexible EMR, the SNF can:

- **Utilize in-app messaging and education** tools.
- **Communicate directly with support** agents.
- **Work with a dedicated Clinical Success Manager.**

When choosing an EMR, make sure it provides:

- Live support during US work hours for real-time troubleshooting.
- 24/7 AI-powered chat to instantly resolve common questions.
- Direct access to support agents for immediate issue resolution.
- Dedicated Clinical Success Manager to ensure success and optimization.
- On-platform guided training tools and in-app education so users can learn as they go.
- Integrated in-app messaging for seamless communication and quick problem-solving.

Seamless Integration:
A Therapy EMR That Works with Your Entire System

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↘ Why It Matters?

A modern Therapy EMR should work as part of a connected ecosystem, not as an isolated system. Many legacy EMRs lack real-time integration capabilities, forcing therapy teams to transfer data between systems manually. This leads to double documentation, inefficiencies, and limited clinical and operational data visibility.

With open API capabilities, a Therapy EMR should seamlessly integrate with facility EMRs, billing platforms, business intelligence tools, and other key applications—ensuring data flows freely to support better decision-making, compliance, and financial performance.

↘ With an open API-enabled EMR, Your SNF can:

- Sync therapy documentation in real time with the facility EMR.
- Seamlessly integrate with billing & payroll systems to eliminate tedious processes.
- Automate data exchange with business intelligence (BI) platforms for better performance tracking.

With real-time data, facilities can operate proactively, making informed decisions that drive efficiency, accuracy, and financial success. A fully integrated Therapy EMR provides leadership with instant access to key metrics, enabling them to streamline operations, optimize resource allocation, and enhance patient care and business performance.

When choosing an EMR, make sure it provides:

- LIVE API connections to facility EMRs for real-time data exchange.
- Interoperability with billing, scheduling, and payroll systems to streamline financial and administrative workflows.
- LIVE Integration with business intelligence (BI) and reporting tools to track performance and optimize operations.
- The ability to connect with third-party applications for enhanced functionality.
- Secure data-sharing capabilities to ensure compliance.

The Bottom Line: Data should flow in real time, not every 24 hours or be manually transferred. EMR with open API integration allows SNFs to connect with any modern application, eliminating silos and unlocking greater efficiency.

A Step-by-Step Guide to Transitioning to a New Therapy EMR

→ **Step 1: Identify What's Not Working in Your Current EMR**

→ **Step 2: Assemble a Cross-Functional Selection Team**

→ **Step 3: Define Must-Have Features & Priorities**

→ **Step 4: Research & Compare Available Solutions**

→ **Step 5: Product Demonstrations & Vendor Evaluation**

→ **Step 6: Seamless Transition & Ongoing Support**

→ **Step 7: Optimize & Improve Post-Implementation**

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Identify What's Not Working in Your Current EMR

Start by evaluating your current system's limitations and how they impact workflows, compliance, and efficiency. Engage therapists, rehab directors, MDS teams, billing managers, and administrators to pinpoint key pain points that hinder daily operations and growth, such as:

- **Slow performance and system downtime**, leading to delays in documentation and workflow disruptions.
- **Rigid documentation workflows** that don't align with your clinical approach or adapt to different insurance requirements.
- **Limited integration capabilities** with facility EMRs and technology partners, creating inefficiencies and manual workarounds.
- **Unresponsive customer support** or insufficient training resources, making it difficult to resolve issues quickly and effectively.
- **Lack of structured training and onboarding suppor**t, leaving therapists and staff struggling to adopt the system efficiently.
- **Pricing and long-term commitment** concerns, including hidden costs, price escalations, or restrictive multi-year contracts that limit flexibility.

By clearly defining these challenges, you can set priorities when selecting a new EMR—ensuring that your next solution enhances efficiency, improves documentation, integrates seamlessly, and provides the necessary support without long-term constraints.

My Notes:

Step 2:

Assemble a Cross-Functional Selection Team

Each organization has unique priorities when selecting a Therapy EMR—whether it's efficiency, compliance, or seamless integration. Defining key requirements ensures your system supports clinical workflows, regulatory needs, and operational goals.

Who Should Be Involved?

✓ **Therapists & Clinical Staff** – Ensure the EMR supports efficient documentation, clinical workflows, and compliance needs.

✓ **Rehab Directors & Administrators** – Align the system with regulatory requirements, reporting, and operational efficiency.

✓ **MDS Team** – Verify that the EMR integrates seamlessly with MDS documentation and supports compliance tracking.

✓ **Billing Managers** – Ensure accurate and efficient data flow between the Therapy EMR and the facility's primary EMR to support billing and financial reporting.

✓ **IT & Facility Leadership** – Ensure integration with existing EMRs and technology partners, system security, and ease of implementation.

Why This Matters?

By involving representatives from different areas, you create a balanced decision-making process that reflects the needs of all users. Each role brings a unique perspective, helping to:

- Identify efficiency improvements for documentation and reporting.
- Ensure seamless financial and compliance alignment.
- Reduce implementation friction by addressing technical and workflow concerns upfront.

The Bottom Line: A successful EMR transition starts with the right team. Engaging key stakeholders early ensures that your chosen system works for everyone—from therapists to billing managers to facility leadership.

Step 3:
Define Must-Have Features & Priorities

Start by identifying the biggest challenges that your therapy team, administrators, and leadership face with your current EMR. Are inefficiencies in documentation slowing therapists down? Is compliance tracking too rigid or not adaptable to different payer and state requirements? Do integration gaps create double documentation and data silos? Once you pinpoint these issues, rank your priorities based on what will have the most impact—whether it's improving workflow efficiency, ensuring compliance flexibility, or enhancing system integration. Engaging key stakeholders in this process ensures that your new EMR is chosen with real needs in mind, supporting both day-to-day operations and long-term success.

What to Prioritize in a Therapy EMR?

- **Customizable Documentation** – Tailor workflows to meet clinical, payer, and compliance requirements.
- **Seamless Integration** –A system with open API capabilities that enables real-time data exchange with facility EMRs, billing systems, and technology partners.
- **Automation & Smart Features** – AI-driven processes, smart alerts, compliance tracking, and real-time reporting.
- **Compliance & Security**: Role-based access controls that are flexible to meet your organisation's structure and audit logs to support regulatory requirements and protect patient information.
- **Training & Support** – 24/7 AI-powered chat, live support during US work hours, and a dedicated Clinical Success Manager to ensure your team has the help they need, when they need it.
- **Flexibility & Development** – The ability to adapt the EMR to your organization's evolving needs, with a vendor that can provide quick turnaround times for enhancements and customizations.
- **Contract & Pricing Transparency** – Flexible terms with no hidden fees or restrictive long-term commitments.

Step 3:

While a modern Therapy EMR should offer these key features, each facility has unique priorities. Some focus on efficiency and automation, reducing documentation time, while others need compliance flexibility with custom alerts and workflows at different levels. For many, seamless integration with facility EMRs and third-party applications is essential to eliminate double documentation and improve data flow. Identifying what matters most ensures your next EMR is not just feature-rich, but fully aligned with your facility's goals and workflows.

Aligning Priorities with Your Facility's Needs

- **Efficiency** – Does the system reduce documentation time and automate reporting?
- **Compliance** – Can you customize alerts, documentation flexibility, and requirements at the building, operator, and state levels?
- **Integration** – Does it support seamless data exchange with facility EMRs and third-party applications?

The Bottom Line: A Therapy EMR should align with your workflows, compliance needs, and technology ecosystem—helping you improve efficiency, ensure compliance, and simplify operations.

Identifying the Right Priorities for Your Organization

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Step 4:

Research & Compare Available Solutions

Many platforms competing with legacy EMRs are new to the market, each at different stages of development, with varying levels of real-world experience. Some are still building out core features, refining their onboarding processes, and addressing early challenges. When selecting a new EMR, it's important to choose the most experienced among these emerging solutions—a vendor that has successfully onboarded more SNFs, worked with multiple operators, and solved a wider range of real-world challenges. The right partner will have proven readiness, ensuring a smoother transition, faster adoption, and a platform that continues to evolve with your needs.

Look for Vendors with Proven Readiness!

- **Experience & Market Presence** – How many SNFs and operators has the vendor successfully onboarded? Have they already addressed complex therapy documentation, compliance, and integration challenges?
- **Implementation Readiness** – Can the system be deployed efficiently, with minimal disruption to your team's workflow? Has the vendor refined its implementation process through real-world experience?
- **Scalability and Stability** - Is the system fully developed and tested or still in the early refinement phases?
- **Comprehensive Support** – Does the vendor offer structured onboarding, a dedicated Clinical Success Manager, and fast response times?

With new platforms emerging, it's important to assess which vendors have real-world success in SNFs and have already solved challenges similar to yours.

Step 4:

Experience the System Firsthand

Request sandbox access to test the EMR in a real-world setting before making a decision. This allows your team to:

- Navigate the platform and assess ease of use.
- Test documentation workflows to ensure efficiency.
- Explore integration capabilities with your facility's EMR and third-party systems.
- Define necessary adjustments to tailor the system to your clinical, compliance, and operational needs.

Making the Right Comparisons

As you research options, consider:

- **How many SNFs and operators** has the vendor successfully onboarded?
- **What level of customization and development** responsiveness does the vendor offer?
- **Is the system fully developed and scalable,** or is it still evolving?
- **Does the vendor offer live demonstrations** showcasing actual therapy workflows?
- **Does the vendor provide sandbox access**, allowing your team to test workflows, integrations, and usability?

↘ The Bottom Line: Choosing a Therapy EMR is about more than features— it's about partnering with a vendor that has real-world experience solving challenges for SNFs like yours. Look for a proven, ready-to-scale solution that ensures seamless integration, efficient onboarding, and strong long-term support.

"Many platforms promise future improvements, but what matters is how well the system answers your needs today."

Step 5:

Product Demonstrations & Vendor Evaluation

A live demonstration is your opportunity to see how an EMR truly functions in a real-world therapy setting. Beyond a standard walkthrough, the demo should showcase the system's ability to meet your facility's specific needs—from documentation efficiency to seamless integration. Focus on evaluating speed, flexibility, and ease of use to ensure the system enhances workflows rather than adding complexity.

Key Areas to Evaluate During a Demo

- **Request Live Customization Demonstrations** – Ask the vendor to modify documentation templates, add new data fields, or adjust compliance settings during the demo. This ensures the system is adaptable to your facility's needs and doesn't rely on rigid, pre-set workflows.
- **Observe Real-Time Documentation Speed** – Have the vendor complete a full therapy note, progress note, and discharge summary to see how many steps and clicks are required. A modern EMR should minimize documentation time without unnecessary navigation.
- **Test Reporting & Analytics** – Ask to see how quickly the system generates real-time therapy utilization reports, compliance tracking, and payer-specific documentation insights without IT intervention.
- **Check the User Interface & Navigation** – A well-designed interface should be intuitive and easy to use, reducing the need for extensive training. Look for logical workflows, clear organization, and minimal extra steps.
- **Assess Compatibility Across Devices & Operating Systems -** Ensure the system functions smoothly on desktops, laptops, and tablets with different screen sizes and operating systems (Windows, macOS, iPads). Apple devices and touchscreen interfaces should be tested to confirm optimal performance in different work environments.

Step 5:

Go Beyond the Demo: Get Hands-On with Sandbox Access

Beyond observing a demo, request sandbox access to experience the system firsthand. A sandbox environment allows your team to:

- Navigate the platform independently and explore ease of use.
- Test documentation workflows to ensure they align with therapist needs.
- Evaluate integration capabilities by assessing data flow between systems.
- Identify necessary customizations to optimize efficiency and compliance.

Making the Right Choice

As you compare vendors, ask:

- Does the system perform efficiently in a real-world therapy setting?
- How much flexibility does the platform offer in documentation and reporting?
- Can therapists, billing managers, and administrators all use it effectively?
- Is the EMR compatible with the devices and operating systems used in your facility?
- Does the vendor provide a sandbox to test functionality before committing?

The Bottom Line: A great EMR isn't just about features—it's about how well it works for your facility. A hands-on experience through live demos and sandbox testing ensures that your chosen EMR is fast, flexible, and ready to support your team from day one.

"A great Therapy EMR should feel intuitive and not require days of training."

Step 6:

Seamless Transition & Ongoing Support: What to Expect from Your EMR Partner

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Selecting a Therapy EMR isn't just about features—it's about choosing a partner to provide the support, training, and ongoing development needed for long-term success. A smooth transition depends on structured onboarding, reliable support, and a vendor continuously enhancing the platform to meet evolving industry needs.

What to Look for in an EMR Partnership

With new platforms emerging, it's important to assess which vendors have real-world success in SNFs and have already solved challenges similar to yours. Consider:

✔ **Onboarding & Training Process** – A successful EMR implementation starts with hands-on support and accessible training tools. Look for:

- Live training sessions to ensure therapists, administrators, and billing teams can quickly adopt the system.
- On-demand resources and guided tours that allow users to learn at their own pace.
- A dedicated Clinical Success Manager to provide ongoing guidance and best practices for workflow optimization.

✔ **Data Migration & System Setup** – Transitioning to a new EMR shouldn't require manual data entry or workflow disruptions. Your vendor should:

- Handle seamless data transfer from your previous system.
- Ensure historical patient data, therapy minutes, and billing records are accurately imported.
- Minimize downtime so your team can continue providing care without delays.

Step 6:

What to Look for in an EMR Partnership

✔ **Dedicated Customer Success & Support Availability –** Your therapy team should have fast, reliable support whenever they need it. Prioritize vendors that offer:

- 24/7 AI-powered chat support for immediate troubleshooting.
- Live support during US business hours for real-time issue resolution.
- A dedicated Clinical Success Manager who understands your facility's needs and ensures long-term success.

✔ **System Updates & Future Enhancements –** An EMR should continuously improve and evolve to meet new regulatory, clinical, and operational demands. Look for:

- Regular system updates with new features and performance enhancements.
- Transparent communication on upcoming developments.
- A vendor that actively listens to user feedback and prioritizes updates based on real-world SNF needs.

The Bottom Line: An EMR is more than just software—it's a long-term partnership. Choose a vendor that provides comprehensive training, seamless onboarding, reliable support, and continuous innovation to help your therapy team succeed.

"A successful EMR transition isn't just about go-live—it's about what happens afterward."

Step 7:

Optimize & Improve Post-Implementation

Implementing a new Therapy EMR is just the beginning. To maximize its value, ongoing optimization and performance reviews are essential. Regular check-ins, training, and data analysis ensure your system continues to support your evolving workflows, compliance needs, and operational goals.

How to Continuously Improve Your EMR Experience

✓ **Regular Vendor Check-Ins & Training Opportunities**

- Schedule ongoing check-ins with your vendor to review workflow efficiency, user feedback, and system updates.
- Take advantage of new training resources and refresher courses to keep your team engaged and informed.
- Ensure your Clinical Success Manager is available to address challenges and help refine processes.

✓ **Performance & Workflow Adjustments**

- Analyze how therapists, billing managers, and administrators use the system—are there bottlenecks or inefficiencies that can be improved?
- Customize documentation workflows based on therapist feedback and payer requirements.
- Adjust system settings, templates, and automation features to align with regulatory changes and facility needs.

Step 7:

How to Continuously Improve Your EMR Experience

✔ Data-Driven Decision-Making Using BI Dashboards

- Leverage built-in business intelligence (BI) tools to track compliance, therapy utilization, and financial performance.
- Use real-time reporting to make informed staffing, billing, and operational decisions.
- Identify trends and proactively address challenges before they impact efficiency or compliance.

The Bottom Line: Optimizing your EMR is an ongoing process. Regular vendor collaboration, system refinements, and data-driven insights help your facility maximize efficiency, compliance, and long-term success.

"Your EMR should evolve with your organization. At RESTORE-Insights, we go beyond implementation—continuously refining workflows, enhancing automation, and ensuring seamless compliance to support your long-term success."

My Notes:

THERAPY EMR SELECTION CHECKLIST

Selecting a Therapy EMR is a critical decision that impacts clinical efficiency, compliance, operational workflows, and financial performance. Use this checklist to evaluate potential EMR solutions based on the key factors detailed in this guide.

Category	Key Questions to Ask
System Performance & Reliability	Does the system offer fast, stable performance with minimal downtime? Is there real-time auto-save to prevent data loss? Can the platform handle multiple users efficiently without lag?
Customizable Documentation	Can documentation workflows be tailored to payer and compliance requirements? Does it allow structured and free-text documentation? Can documentation fields be modified without vendor delays? Can workflows be customized per facility, payer, or state requirements?
Seamless Integration & Open API	Does the EMR offer LIVE API integration with facility EMRs and billing systems? Can it exchange real-time data with payroll, scheduling, and third-party applications? Does it integrate with BI and analytics platforms for operational insights? Can it support custom integrations to align with facility needs?
Automation & Smart Features	Does the EMR use AI-powered automation Are smart alerts and real-time compliance tracking available? Does it offer automated reporting for therapy utilization and performance metrics?
Training & Support	Is 24/7 AI-powered chat support available for immediate troubleshooting? Does the vendor offer live support during US work hours? Will your facility have a dedicated Clinical Success Manager? Are on-platform training tools and guided tours available for quick onboarding? Can your team access in-app messaging and educational tools for immediate guidance?

THERAPY EMR SELECTION CHECKLIST

Category	Key Questions to Ask
Development Flexibility & Vendor Readiness	• Has the vendor successfully onboarded multiple SNFs and operators? • Does the vendor offer quick turnaround times for customizations? • Has the system proven its ability to solve real-world SNF therapy challenges? • Is the system fully developed and scalable, or is it still evolving?
Contract & Pricing Transparency	• Does the vendor offer month-to-month agreements instead of long-term contracts? • Are pricing structures transparent, with no hidden fees or price escalations? • Can the system scale easily without costly upgrades?
Implementation & Ongoing Optimization	• Does the vendor provide a structured onboarding process with live training and on-demand resources? • Is data migration seamless, without manual re-entry? • Does the vendor offer regular system updates and enhancements? • Will your facility receive ongoing workflow optimization support?
Hands-On Testing & Vendor Demonstrations	• Can the vendor provide live customization demos to showcase flexibility? • Can you see real-time reporting, compliance tracking, and data integrations in action? • Does the system work across desktops, laptops, tablets, and different operating systems (Windows, macOS, iPads)? • Does the vendor offer sandbox access for hands-on testing before committing?

The right Therapy EMR should be proven, scalable, and built for your facility's long-term success. Use this checklist to ensure your next EMR meets the highest standards in performance, integration, customization, and support.

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A STEP-BY-STEP GUIDE TO TRANSITIONING TO A NEW THERAPY EMR

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