

The export test

One page, run before you sign anything.

A system you cannot leave is a system that prices you later. Run this before signing, while you are still the one being sold to — it is the only week you will get a straight answer.

ASK THESE, IN THIS ORDER

- ☐ Can you export the full patient list, with demographics, yourself — without asking anyone?
- ☐ Can you export the notes as documents, not as a screen you would have to print one at a time?
- ☐ Can you export the ledger — charges, payments, adjustments, by date?
- ☐ What format does it come out in, and can something else read it?
- ☐ How long does the export take, and who runs it — you, or them?
- ☐ What does it cost? Is there a fee at the exit, and is it capped?
- ☐ Is all of the above written in the contract, or was it said on a call?

THE RECORD

The system

Who you asked, and their role

The date

In writing?

Yes / no

If the last box says no, you do not have an answer. You have what somebody said, and you have it for exactly as long as they work there.

Composite numbers throughout. Yours are yours. Not legal, tax, billing or clinical advice.

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