

HRT EMR Features Checklist

24 vendor-demo questions for TRT, menopause/HRT, and BHRT clinics

Clinic / vendor: _____ Demo date: _____

Mark each item: Yes / Partial / No / Not needed. Ask for a live demonstration and record evidence.

Clinical workflow

- ☐ **01 Structured HRT intake**
Capture symptoms, history, medications, contraindications, and goals in reusable forms.

- ☐ **02 Longitudinal chart**
View prior visits, therapies, labs, and care plans together without hunting through PDFs.

- ☐ **03 HRT-specific note templates**
Adapt clinician-reviewed templates for TRT, menopause/HRT, and BHRT visits.

- ☐ **04 Follow-up and monitoring**
Track due dates and overdue follow-up tasks; show who owns each task.

Labs and treatment

- ☐ **05 Lab order workflow**
Create and route orders and show order status; verify your preferred laboratories.

- ☐ **06 Result import and trend view**
Bring results into the chart with units, dates, and reference ranges visible.

- ☐ **07 Clinician review of results**
Show a clear review, sign-off, and patient notification workflow.

- ☐ **08 Medication history**
Keep prescribed and compounded therapies, changes, and discontinuations visible.

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Prescribing and safety

☐ 09 E-prescribing

Demo pharmacy selection, renewals, corrections, and failed transmission handling.

☐ 10 Controlled-substance workflow

If relevant, request evidence for DEA-compliant EPCS, identity proofing, and two-factor signing.

☐ 11 Allergy and interaction context

Check what alerts exist, their source, and how clinicians resolve them.

☐ 12 Clinician approval for AI

Ensure AI-produced notes or draft actions can be reviewed, edited, and rejected.

Patient access and visits

☐ 13 Async pre-visit intake

Let patients complete forms before visits and route answers into the chart.

☐ 14 Scheduling and reminders

Support recurring follow-ups, provider calendars, and appointment reminders.

☐ 15 Telehealth in the chart

Test the link from appointment to visit note, orders, and follow-up.

☐ 16 Secure patient communication

Ask where messages, documents, and consent records are retained.

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Practice operations

☐ 17 Billing and payments

Confirm invoices, subscriptions or packages, refunds, and reconciliation as needed.

☐ 18 Multi-location controls

Check location-specific schedules, staff permissions, and consolidated reporting.

☐ 19 Operational reports

Request useful views of visits, follow-ups, revenue, and outstanding work.

☐ 20 Integration scope

List exact labs, pharmacies, payment tools, and APIs that work today.

Security and switching

☐ 21 Role-based access and audit logs

Test least-privilege roles and retrieval of access and change history.

☐ 22 BAA and safeguards

Review the BAA and vendor documentation for security, backup, and recovery.

☐ 23 Data export

Request a sample export of charts, notes, documents, and structured data.

☐ 24 Migration and support plan

Get a written plan, test import, training scope, go-live support, and total cost.
