

A person with dark hair is seen from the back, looking at a computer monitor. The monitor displays a software interface with a teal header and a table of data. The background is a blurred office environment with windows and lights. A large blue graphic overlay covers the bottom half of the image, containing the title text.

PMS Readiness Assessment

How Prepared Is Your Practice for a PMS Upgrade?

Answer **Yes** or **No** to each statement.

Give yourself:

- **1 point** for every **YES**
- **0 points** for every **NO**

At the end, add your score to see how prepared your practice is for a modern Practice Management System (PMS).

Scoring Guide

Total Score	Readiness Level	What It Means
0-4	Critical Gaps	Manual processes, revenue leakage, and staff inefficiencies are likely affecting performance.
5-9	Needs Improvement	Some workflows are working well, but there are clear opportunities to automate and improve efficiency.
10-12	Strong Foundation	Your practice has many key processes in place, with a few areas still worth optimizing.
13-15	High Performance	Your workflows are operating at or above industry benchmarks across most operational areas.

1. Patient Intake & Registration (3 Points)

- Yes No - Patients complete intake forms digitally before their visit.

Why it matters : Digital intake reduces check-in times and minimizes paperwork bottlenecks.

- Yes No - Staff do not manually re-enter patient information from paper forms.

Why it matters : Manual data entry increases errors and consumes valuable staff time.

- Yes No - Intake information automatically flows into your EHR without additional steps.

Why it matters : Disconnected systems create duplicate work and increase registration errors.

Section Score: _____ / 3

2. Insurance Verification & Eligibility (3 Points)

- Yes No - Eligibility is verified automatically before every appointment.

Why it matters : Manual verification is one of the leading causes of avoidable front-end denials.

- Yes No - Coverage issues are identified before the patient arrives.

Why it matters : Resolving insurance problems before check-in prevents delays and improves collections.

- Yes No - Staff spend less than two hours per day on manual eligibility-related work.

Why it matters : Excessive eligibility work is a strong indicator that automation could deliver immediate ROI.

Section Score: _____ / 3

3. Patient Payments & Collections (3 Points)

- Yes No - Patients receive a cost estimate before their visit.

Why it matters : Financial transparency improves patient trust and increases point-of-care collections.

- Yes No - Co-pays and patient balances are collected during most visits.

Why it matters : Collecting earlier is significantly easier than pursuing balances after the visit.

- Yes No - Patients can pay online after their visit.

Why it matters : Convenient payment options improve collection rates and reduce staff follow-up.

Section Score: _____ / 3

4. Scheduling & No-Show Management (3 Points)

- Yes No - Appointment reminders are sent automatically through SMS or email.

Why it matters : Automated reminders consistently reduce no-shows and scheduling gaps.

- Yes No - Patients can schedule or reschedule appointments online.

Why it matters : Self-scheduling reduces inbound call volume and improves patient satisfaction.

- Yes No - Same-day cancellations trigger an automated waitlist or fill process.

Why it matters : Filling open slots helps recover otherwise lost revenue.

Section Score: _____ / 3

5. Billing, Claims & Reporting (3 Points)

- Yes No - Your days in A/R are at or below industry benchmarks.

Why it matters : High A/R often signals workflow bottlenecks, denial issues, or follow-up gaps.

- Yes No - Denied claims are automatically flagged and routed for action.

Why it matters : Manual denial management increases revenue leakage and delays reimbursement.

- Yes No - You have real-time visibility into collections, A/R, and denial trends.

Why it matters : Practices without live reporting often identify revenue problems too late.

Section Score: _____ / 3

Total Score

Your Score: _____ / 15



Results

0–4: Critical Gaps

Your practice is likely relying on manual workflows that increase staff workload, slow collections, and create avoidable operational inefficiencies.

5–9: Needs Improvement

Several core processes are functioning, but there are opportunities to automate workflows, reduce administrative burden, and improve financial performance.

10–12: Strong Foundation

Your practice has many effective processes in place. A focused PMS evaluation can help address remaining inefficiencies and support future growth.

13–15: High Performance

Your workflows are performing well across key operational areas. Future PMS decisions should focus on scalability, integrations, reporting, and patient experience improvements.

Ready to See Where Your Biggest Opportunities Are?

A score tells you where gaps exist.

A practice assessment helps you understand how those gaps affect revenue, staffing, patient experience, and operational efficiency.

Schedule a Free Practice Assessment



Book a demo

