ProsperityEHR

The Right EHR is a Growth Strategy

How to Choose the Right Behavioral Health Platform to Scale, Improve Care, and Reduce Administrative Burden

Introduction

Choosing the right EHR platform is one of the most critical decisions a behavioral health practice can make.

Picking the wrong system—or implementing it poorly—could jeopardize your entire practice. But the right platform not only allows you to operate, it also does more—it supports sustainable growth, improves care quality, and empowers providers to focus on what matters most: connecting with their patients.

For many, the term EHR carries baggage. It conjures nightmares of endless documentation, rigid workflows, and systems built for billing rather than behavioral health. Many practices have had to force-fit their unique workflows into technology that wasn't designed with them in mind.

It's 2025, and time to reboot the way you think about an EHR. Today, dishwashers come with their own apps and "smart" features— it's reasonable to expect more from an EHR, too. Instead of viewing an EHR as a necessary burden, imagine it as a purpose-built tool designed to enhance patient connection, streamline operations, and unlock new levels of efficiency. The right platform doesn't just keep up with your practice—it helps it thrive.

The technology landscape is evolving rapidly, and healthcare is no exception. And while technology options are plentiful in behavioral health, they are often fragmented and can introduce unexpected inefficiencies. **Behavioral health organizations need more than just an EHR. They need an integrated, flexible, future-ready technology platform that grows with them.**

This guide will walk you through the key factors in selecting the right EHR, helping you avoid common pitfalls and ensuring you invest in a system that is built to invest in your ability to scale —without adding unnecessary administrative burden.

What's Inside?

> Studies show that up to **50% of provider time is spent on administrative tasks** and documentation, while n**early 1/3 of behavioral health claims are initially denied** due to incomplete documentation or incorrect coding.

Is your technology helping or holding you back?

Approaching your technology with a growth focus

AI adoption

AI-assisted tools are maturing at an unprecedented pace. Adoption is growing across the industry. Practices that aren't integrating AI and adding these transformative tools to their toolboxes risk falling behind. **To drive value for providers, staff, and your organization, they must be integrated into their daily workflows.** And that means the systems that make up your technology ecosystem.

Interoperability to support connected care

Care is becoming more connected. **Sharing data with your partners, your patients, and their network of care teams is table stakes**, yet too often practices are disappointed to find out their systems can't get data in or out without custom development and cumbersome, manual workflows.

Revenue cycle complexity

Managing the revenue cycle in behavioral health has always been challenging, but today's environment feels like a **high-stakes game of Spy vs. Spy**. Just when you think you've outmaneuvered payers, they shift the rules. With AI-driven claim analysis tools, reimbursement has become even more unpredictable. It's like chasing a dollar on an invisible string—just when you think you've secured payment, it moves out of reach. Whether intentional or not, the impact is undeniable. **Practices are fighting harder than ever to get paid for the care they provide.** To stay ahead, behavioral health practices need AI and automation not just to keep up, but to take control.

Security risks

Security can't be an afterthought in a future-ready platform. As AI-driven automation and data sharing become essential for operational efficiency, they also expand the risk landscape. **Cyber threats are evolving just as quickly as technology, and outdated systems that lack modern security protocols put patient data and your organization at risk.** A secure, compliant platform isn't just about checking a regulatory box; it's about protecting your practice's financial health, reputation, and ability to grow in a connected, AI-enabled world.

> Will your current technology enable you to adapt to the changing landscape? Will your current pain points get in the way of sustainable scaling?

The Challenges Facing Behavioral Health Practices Today

Behavioral health providers face mounting administrative burdens that take valuable time away from patient care. These inefficiencies don't just create frustration—they impact revenue, compliance, and the ability to scale.

Too much admin work

Documentation, scheduling, intake, registration, and billing are often clunky and time-consuming, pulling focus away from patient care.

Provider burnout

You're not just a caregiver; you're also a business owner, compliance expert, insurance negotiator, and paperwork machine. The mental load keeps growing.

Reimbursement headaches

High denial rates and complicated payer workflows disrupt cash flow and add financial stress. On top of that, many EHRs aren't built to handle behavioral-health specific billing and revenue cycle management properly.

Disconnected systems

Juggling multiple, unintegrated tools leads to errors, inefficiencies, and frustration for both staff and patients.

Scaling struggles

Growth shouldn't mean hiring more admin staff just to keep up.

Compliance and regulatory stress

Keeping up with evolving documentation and reporting requirements adds another layer of complexity (and audit anxiety).

Lack of operational insights

Without real-time data and analytics, optimizing performance and ensuring compliance feels like a guessing game.

Can you afford to keep doing it the way you are doing it today?

Many EHR systems were built more than a decade ago and weren't designed for the complexities of today's behavioral health practices. And they certainly weren't built using modern, human-centered design principles that accelerate adoption and increase efficiency. "Doing nothing" typically leads to escalating inefficiencies and missed opportunities, ultimately harming your ability to grow and thrive

On top of that, we have a supply and demand problem in our industry. Is your practice looking to attract and retain top providers? The technology you use plays a critical role. A modern, intuitive EHR **reduces frustration, minimizes administrative burden, and supports seamless workflows,** making it easier for providers to focus on patient care—not fighting with the system. In a competitive hiring market, offering **technology that works for your providers, not against them,** can be a key differentiator in attracting and retaining the best talent.

The cost of avoidance

By sticking with outdated systems, you're not just avoiding the cost of a new EHR platform—you're paying the price in lost time, reduced revenue, and increased frustration. Here are some hidden costs you may be experiencing:

The right technology, properly installed and supported, is worth it.

We've heard it from many practice owners: *"The stress associated with switching probably outweighs the benefits, so I'm going to stay where I am."*

It is disappointing to hear so many horror stories of EHR transitions. Picking the wrong technology or going through a bad implementation detracts from the important work at hand.

Don't fall victim to sunk cost fallacy. It is time to let go of the past and **raise your expectations**. The right technology, properly installed and supported, **is worth switching to.**

Limited AI and Automation Capabilities

- Older systems cannot support modern workflows or integration with tools like artificial intelligence and automation that can streamline operations.

Interoperability Challenges

- Outdated EHRs struggle to meaningfully integrate with other healthcare systems, making referral management and data sharing an entirely manual process.

Security Risks

- Software may not meet current cybersecurity standards, putting your practice at risk of a breach, which brings an entire operation to a halt.

Expensive Upgrades

- You may be paying for costly customizations just to meet basic regulatory requirements.

Software Sunsets

- When vendors retire their products whether it be due to new technology or (more commonly) an acquisition, you may have to make a switch on their timeline instead of yours.

Denied Claims & Lost Revenue

- Inefficient, manual billing systems that lack automation capabilities lead to denied claims and less revenue.

Staff Burnout

- Providers and administrative staff are spending too much time on documentation, leading to fatigue and dissatisfaction.

Where is inefficiency hurting you?

It's essential to ask: **Where are inefficiencies draining your practice's time and resources and adding unnecessary cognitive burden?**

Consider these areas:

Manual Patient Intake Processes

- Long paperwork processes that could be automated

Disjointed Systems Duplicating Work

- Your team likely spends too much time toggling between different tools, entering duplicate data, and reconciling errors.

Billing Errors

- Hours spent tracking down and correcting claims that were rejected due to incomplete documentation or coding errors.

Cumbersome Reporting & Compliance

- Difficulty pulling meaningful reports, forcing your team to manually combine data from different systems.

Is it sustainable to keep doing things as you are today? "Just ok" - is not okay.

If you are reluctant to invest in a new system, ask yourself: *Is it sustainable to keep doing things as you are today?* Consider a non-healthcare example: buying a new mattress for your bed. You think the current one that's 10+ years old is fine—you don't need to spend $1,000 (or more) on something new. But what you don't realize is that it's causing you to not sleep as well as you should...and you can't figure out why you're tired all of the time. And when chronic back pain sets in and you see a chiropractor (also expensive), you're asked about the age and shape of the mattress you sleep on and think "I should've invested in a new mattress years ago."

Avoiding change often costs more in the long run than investing in the right technology upfront.

Consider these factors:

Security and HIPAA Compliance: Outdated systems may leave your practice vulnerable to security breaches, leading to significant financial penalties and damage to your reputation.

Regulatory Compliance: Manual processes can lead to inadvertent non-compliance, and as regulations change, you may face more costly upgrades, audits, or financial penalties from payers.

The Hidden Costs of Inefficiencies

The hidden costs of inefficiency go beyond just time and money—they can also impact your team's mental load and overall practice morale.

Cognitive Load

Juggling multiple disjointed systems can increase mental strain on staff, leading to mistakes and burnout.

Lost Revenue

Missed opportunities to optimize revenue through accurate coding, billing, and claims submission.

Provider Burnout

The more time providers spend on administrative tasks, the less time they have for patient care, increasing stress and turnover.

By continuing with outdated systems, you're choosing higher risks, inefficiencies, and frustrations. **The right investment today could lead to a more secure, efficient, and profitable practice tomorrow.**

Where does your technology fit in? Is it streamlining operations—or making things harder?

Inventory all the technology you use today

What do you have today?
Where are the gaps?

To effectively evaluate your options, it's essential to take an inventory of your current technology setup and the manual processes your team relies on. Many behavioral health practices are burdened by piecemeal solutions and disparate systems that don't work together efficiently. **These disconnected tools not only cause inefficiencies but also hinder your ability to scale and optimize operations.**

Common stand-alone systems and manual processes in today's practices

Intake Documentation

Paper-based processes and non-integrated forms require duplicate data entry and manual intervention.

Clinical EHR

Disconnected systems for clinical notes and treatment plans that don't talk to billing systems.

AI Scribes

Great for summarizing patient sessions, but still have to be manually pasted into an EHR.

Practice Management

Manual appointment and registration systems that don't integrate with the rest of the workflow or support self-service patient scheduling.

Release of Information

Cumbersome, time-intensive processes for assembling and sharing patient information.

Telehealth

Non-integrated systems that may have their own scheduling and reminder interface.

Patient Portal

Lack of integration with clinical and billing systems creates more steps for patients, providers, and staff.

Payer Integration

Integration with clearinghouses? Yet another place that revenue could be held up.

Revenue Cycle

Separate systems lead to manual follow-ups and claim rejections due to incorrect charge codes, modifiers, or coverage details.

Estimating the Total Cost of Ownership (TCO)

When evaluating your current technology infrastructure, it's critical to consider both hard and soft costs. These include:

Software costs

- Subscription or licensing fees

- Transactional (per use) costs for things like claims submission, claim status checks, coverage eligibility verification, text message communications, and more

- Add-ons for patient portal and telehealth

Maintenance & IT support

- Ongoing costs for system upkeep and troubleshooting issues

- Costs for changes to note templates, treatment plans, and assessments

Manual task time

- Hours spent by staff performing manual tasks that could be automated

- Examples include gathering intake paperwork, transcribing patient assessments and forms, checking coverage eligibility, and submitting medication prior auths

Custom integrations

- Costs associated with custom programing and integrating disparate systems

- Fees for creating custom extracts for program submissions, payer rosters, HIEs, and more

Consider these hidden costs when calculating your Total Cost of Ownership (TCO). These factors often add up to far more than just the price of software.

Ready to consolidate and simplify your technology?

Calculate the potential value with ProsperityEHR's TCO calculator.

Learn More

Ready to explore? Time to prepare.

Read on to learn:

- ☑ How to evaluate EHR vendors

- ☑ Key questions to ask about platform capabilities and support

- ☑ Important diligence areas

Expect More:

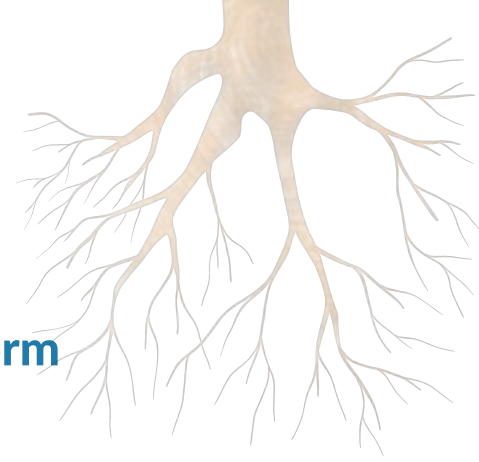## What to look for in a Behavioral Health EHR Platform

Choosing an EHR isn't just about selecting software—it's about investing in the future of your practice. A modern behavioral health EHR does more than store patient charts; it is an operating system that should serve as the backbone of your organization, streamlining clinical, administrative, and financial operations.

The next section outlines the non-negotiables, key differentiators, and future-proofing considerations to help you evaluate the right platform for your needs.

Your practice deserves a strong foundation so it can thrive. Start by prioritizing table stakes capabilities.

Non-Negotiables

A behavioral health EHR must meet core requirements to ensure reliability, compliance, and efficiency. Without these, your practice risks operational inefficiencies, billing headaches, and provider frustration.

☑ Behavioral Health Specialization — Purpose-built for the unique needs of behavioral health providers and support staff.

☑ Modern Technology Performance — Reliable system uptime, fast performance, and an intuitive, user-friendly interface.

☑ Compliance & Security — Must meet all HIPAA, 42 CFR Part 2, and other regulatory requirements.

☑ Guided Implementation & Support — Experienced project mangers to assist with the implementation and transition to the software, and dedicated ongoing support.

☑ End-to-End Integration — A single platform that connects clinical workflows, patient engagement, practice management, and revenue cycle functions without requiring bolt-on solutions.

☑ Structured, Reportable Data — Captures and organizes data to improve reporting, compliance, and operational insights.

☑ Optimized Revenue Cycle Features — Built-in claims scrubbing, automated billing, reimbursement tracking and flexible reporting to maximize revenue.

☑ Patient Engagement Tools — Telehealth, secure messaging, online scheduling, and automated reminders to improve accessibility and patient retention.

Key Differentiators: What Sets the Best Platforms Apart

Beyond the basics, a next-generation EHR provides efficiency, automation, and intelligence to help your practice scale without adding administrative burden.

☑ **Human-Centered Design**

Intuitive features and workflows that have been designed to put the right information in front of the user, at the right time, with the ability to take the right next action.

☑ **Self-Service Analytics & Reporting**

Real-time data insights to track performance, improve decision-making, and ensure compliance.

☑ **Integrated Patient Intake & Documentation**

Patient self-service options that pull information directly into provider notes, reducing manual entry.

☑ **Flexible Documentation & Workflows**

Templated and configurable workflows that align with your practice's needs. Support for different documentation preferences, including AI scribe technology, point-and-click, and keyboard-based tools.

☑ **Self-Service Note Template and Assessment Builders**

Practices are empowered to create and update templates used for documentation in an easy-to-use user interface.

☑ **Efficiency Tools for Documentation**

Look for features like saved phrases for faster note-writing and pre-populated past documentation to speed up charting.

☑ **Automated Compliance & Follow-Ups**

Proactive reminders and automation for compliance-driven tasks, such as treatment plans due for review, reducing manual work.

☑ **Advanced Release of Information Capabilities**

Ability to selectively share records – or portions of records – while ensuring full traceability.

☑ **Integrated Telehealth**

A seamless virtual care experience that connects directly to patient records, scheduling, and billing.

☑ **Partnership Approach**

Ongoing support to help align tech with your business needs including launching new services and navigating payer complexities, state-specific regulations, and evolving compliance requirements.

Future-Proofing: A Platform That Grows With You

The healthcare technology landscape is evolving rapidly. A modern EHR must be adaptable, scalable, and **ready to meet future demands**. When evaluating platforms consider:

AI-Ready Architecture

Enabled with generative AI, predictive analytics, clinical decision support, and workflow automation to improve efficiency and patient outcomes

Interoperability & Open AI Frameworks

Ensures seamless data exchange with HIEs, payers, and external healthcare systems.

Scalability for Regulatory Changes

Adaptability to evolving Medicaid, Medicare, and insurance requirements to avoid costly workarounds.

Security-First Design

Cloud-native infrastructure with advanced encryption, threat monitoring, and proactive security updates.

How to evaluate EHR vendors

There is nothing worse than not getting what you thought you were buying. **We spoke with practice owners and providers who learned lessons the hard way**, and summarized key questions to ask vendors as part of your evaluation and diligence.

The Right Partner Matters

"Having gone through several EHR systems, we've learned an important lesson — the technology itself is only part of the equation. What truly matters is the people behind it. No system is perfect, and challenges will come up, but having a partner who listens, responds, and works with you to find solutions makes all the difference."

Heidi V Carlson, MS, LMFT; Psy.D., L.P.

River Valley Behavior & Wellness Center

The Bottom Line

The right behavioral health EHR should do more than just meet today's needs—**it should help future-proof your practice, drive growth, and enhance care delivery.**

By focusing on non-negotiables, key differentiators, and long-term scalability, you can ensure that your EHR investment delivers real value, operational efficiency, and financial **stability for years to come.**

What to ask

Choosing the right EHR isn't just about technology—it's about choosing the right partner. You've probably heard the saying when buying a home: "Marry the house, date the rate." The same applies here, but in this case, you're not just marrying the platform—you're marrying the people behind it.

Regulations will shift, workflows will change, and technological capabilities will advance. But **the right platform partner is one that grows with you, adapting to your needs instead of forcing you to conform to theirs.** You want a team that truly understands behavioral health, listens to your challenges, and actively works with you to make your practice more efficient—not just a vendor who disappears once the contract is signed.

The wrong EHR can feel like a mismatched relationship—one where you're constantly making compromises, dealing with poor communication, and struggling to get the support you need. The right one? It's a long-term partner that **invests in your success, helps you navigate complexity, and evolves alongside your practice.**

So, don't just focus on today's features—**look at the company and the people behind the platform**.

Are they committed to behavioral health? Do they partner with you during the implementation to ensure a successful transition? Are they by your side with efficient, effective support after you are live? Do they understand where the market is going and build features and offer guidance that positions you for continued growth? Do they have a track record of innovation and adaptability? Do they have principles and treat people fairly?

Because in the end, it's not just about the software—**it's about who's standing beside you as your practice grows.**

Important Diligence Areas

1. **System Conversion**

   - What does the conversion process look like?

   - What is the work effort to transition patient records, clinical documentation, scheduled appointments, and consent forms to the new platform?

   - Do patients have to sign new consents? Can it be done electronically?

2. **Transition Impacts:**

   - How can we test claims submission with our payers?

   - Will there be any delays in sending claims?

   - What is the training and onboarding time for providers and staff?

   - Is the system intuitive enough that we can maintain our patient volumes throughout the transition?

3. **Data Stewardship:**

   - How does the platform handle data ownership and access?

   - Do you fully own your data, and can you export it easily if needed?

   - What formats are available for data extraction, and are there any costs associated?

   - How does the platform safeguard sensitive patient information, and what measures are in place to maintain compliance with evolving data privacy regulations?

   - Understanding these factors is critical to ensuring long-term flexibility and avoiding vendor lock-in.

4. **Ongoing Support:**

   - What level of support does the vendor provide, and what costs are involved?

   - Are changes to note templates, treatment planning content, and assessments included?

   - What are the expected turnaround times for support requests, and are service level agreements (SLAs) clearly defined?

   - Does the vendor offer on-shore support that aligns with your business hours, ensuring timely assistance when needed?

Behavioral Health Vendor Questionnaire

✅ Understanding Platform Capabilities

- How does it handle behavioral health-specific billing?
- What kind of billing automation is available (charge editing, claims, denials)?
- What kind of daily, weekly, and monthly financial reporting options are available?
- Does it support HIPAA, 42 CFR Part 2, and Medicaid compliance?
- What clinical content (treatment plans, assessments like GAD-7, ACE) are available out of the box?
- Does the system support configurable documentation and compliance checks at note signing?
- How does the platform approach role-based access and permissions that align with scope of practice and workflows?
- Does it provide real-time analytics and reporting?
- Can staff and providers send patients digital assessments, treatment plans, and intake forms? Can they digitally sign them? Can the delivery of forms be automated?
- Can staff communicate with one another in the platform?
- How does the software support release of information workflows? Is the process fully traceable?
- Is telehealth integration included? Can providers see the patient and write a session note at the same time? Can the screen be moved around? Can providers blur or change their backgrounds?
- How intuitive is the user experience? Request a demo to see real workflows.

✅ Benefits Realization

- How does this platform reduce documentation burden?
- Can it scale without increasing administrative workload? Will it give you the ability to add providers without having to add additional support staff?
- What 3rd party products or fees can the platform eliminate?
- Does the platform make it possible / easy to stay compliant with regulations as they change over time? Does it make inspections and/or audits easier?
- Does the platform give you the features and confidence to ensure sessions are coded properly, that you're able to avoid denials, and maximize reimbursement?

☑ Partnership Approach

- How structured is the implementation process? Are you proactively guided through it by real people, or are you only given video tutorials and the email address of a person to ask questions? What is the average implementation time?

- What is the vendor's approach to ongoing support? Do they provide on-shore support? When your staff encounter technical trouble, what is the support experience like? Are there published SLAs available?

- Does the vendor offer status checks, new feature / development roadmap previews, and opportunities to connect with company leadership?

- Is experienced, behavioral health consulting support available?

- Does the vendor have a product enhancement request process?

> Advocate for transparent pricing to avoid surprise add-on costs for features like claims submission, integrations with services like lab orders/results, faxing, etc.

The Right Partner is a Growth Strategy

Choosing an EHR platform isn't just a technology decision—**it's a strategic investment in the future of your practice**. The best behavioral health EHRs support your practice's growth, not limit it. It should streamline operations, reduce administrative burden, and free up providers to focus on what matters most: connecting with patients.

The impact of choosing the right EHR goes beyond just features and functions. It influences **every aspect of your practice,** from patient experience to financial sustainability.

- **For patients**, it's about seamless access, better communication, and a more connected experience.
- **For providers**, it's about reducing frustration, cutting down on cognitive overload, and spending less time on documentation.
- **For revenue managers**, it's about optimizing reimbursement, minimizing denied claims, and focusing on high-value tasks.
- **For practice administrators**, it's about simplifying operations, scaling efficiently, and ensuring compliance without extra work.

A smart technology investment doesn't just save time—it saves money. Consolidating vendors, reducing inefficiencies, and automating routine tasks all contribute to a stronger financial foundation for your practice.

Set a foundation for **measuring the ROI** a technology partner delivers across practice—especially if you if you anticipate your practice will grow in scale and complexity.

Read more about this in our blog titled **Considering Changing Technology? Make Sure It's Worth the Switch.**

A Better Way: ProsperityEHR

After evaluating what to look for in an EHR, the next logical question is: who is best positioned to meet these needs?

ProsperityEHR

At ProsperityEHR, **we believe that behavioral health practices deserve more than just great technology**—they deserve a **trusted partner.**

We Built ProsperityEHR Differently

Improve the experience of and access to behavioral health care delivery for all

- ☑ Designed for, and with, behavioral health providers
- ☑ A better experience for everyone
- ☑ Built for the future

Designed for, and with, behavioral health providers

We've worked with behavioral health practices for 30 years.

We understand the complexities and nuances of behavioral health documentation, compliance, and reimbursement. We engineered our platform alongside practice owners and providers to ensure that it's purpose-built to deliver value.

A better experience for everyone

Human-centered design means an intuitive, efficient system.

Providers, patients, administrators, and revenue managers all benefit from an intuitive, efficient system that reduces frustration and cognitive load.

Built for the future

Scale gracefully. Together.

With the behavioral health workforce stretched thin, demand for services growing, and regulations shifting, our system is flexibly designed to scale with you. Security is at the core of our platform, with modern encryption, proactive monitoring, and compliance safeguards to protect patient data in a changing digital landscape.

Helping Therapists Focus on Care, Not Admin

"ProsperityEHR is just what we needed! It is robust while also being intuitive and user friendly. Change can be difficult, even for mental health professionals, but ProsperityEHR's support team is second to none. They have been there every step of the way for us to make it a smooth transition for our therapists and for our bottom line. The built-in automated task reminders for completing intakes, progress notes, treatment plans and billing assure us that nothing will fall through the cracks so that we can focus on providing quality service to our clients."

Rick Jass, Clinical Director and Owner
Charis Counseling, LLC

A Smarter, Integrated Platform to Streamline your Practice

Designed with
scalability in mind

- ☑ Scalability to support growth without adding more admin staff
- ☑ Flexibility for your workflows
- ☑ Efficiency through automation and intuitive navigation

Scalability

Supports your growth as demand for behavioral health services increases.

You can add providers without adding the number of support staff you would have to add today.

Efficiency

Let your staff spend more time with patients and less time hunting for information and figuring out where to click.

Reduces administrative overhead and provider burnout with smart automation, templated workflows, and intuitive navigation.

Flexibility

Adapting to your unique needs.

Works for different specialties, settings, and care models, adapting to your unique needs. It also allows you to adjust workflows in an evolving regulatory environment.

Cohesive, user-friendly, industry-leading user experience

Spend time with patients, not your EHR

Behavioral health work is mentally taxing. Providers spend long hours connecting with and caring for patients, only to face additional burdens from documentation, billing, and compliance.

We built ProsperityEHR to help you work smarter, not harder.

- ☑ An **intuitive system** that simplifies onboarding and training.
- ☑ **Reduced cognitive load** with workflows designed to minimize clicks and streamline tasks.
- ☑ **Customizable documentation** to match different visit types—whether it's a brief check-in or an in-depth intake.
- ☑ **Flexible documentation methods** – type, dictate, or use structured picklists, whichever suits your workflow best.

Flexibility and Collaboration

"We are a busy interdisciplinary behavioral health clinic. The ProsperityEHR team worked closely with us to understand what we do. They then delivered a modifiable system to meet the unique needs of our patients, clinicians and support staff. The flexibility built into the system is truly exceptional. Our entire team is thrilled!"

Donald Zaksek, Psy.D., L.P.
Cruz Clinic

Your time is valuable, and humans are only able to keep a limited number of things in their active memory at one time.

That's why ProsperityEHR includes powerful automation tools to eliminate unnecessary steps so you can keep your focus on connecting with your patients.

- ☑ **Smart Task Management** – Tasks auto-generate and resolve when actions are completed.

- ☑ **Quick Navigation** – Embedded links take you exactly where you need to go, reducing wasted clicks.

- ☑ **Pre-Saved Phrases & Quick Fill Documentation** – Reduce repetitive entry and speed up note-taking.

- ☑ **Copy Forward Notes** – Carry forward relevant details while ensuring compliance with evolving documentation requirements.

Intuitive Design that Simplifies Documentation

"ProsperityEHR has made administrative tasks much more efficient while also making documenting a breeze for clinicians. The system usability is simple, even for non-tech savvy users. I am so pleased to use ProsperityEHR, as it not only makes dauting tasks (i.e., charting for therapists) much easier and quicker to complete but it also has measures that help to get some tasks completed so nothing falls through the cracks."

Jessica Rivera, LMFT, Clinical Director and Owner

Clear View Behavioral Services

Our Product Principles
What drives us

Every decision we make in product development is guided by these principles:

The system should never distract from patient care

Providers should be able to document efficiently and stay focused on their patients.

Technology should enable better care

Data and insights should surface at the right time to support clinical decision-making.

User-centered design matters

The system should be intuitive and make it easy to do the right thing.

Flexibility without complexity

We provide a strong foundation, but allow customization so workflows fit your practice, not the other way around.

Scalability for the future

Your EHR should grow with you, not hold you back.

More than software: A strategic partner in your success

Technology alone doesn't solve problems—**people do.** That's why ProsperityEHR isn't just an EHR, it's **a partnership that helps your practice thrive.**

Dedicated Behavioral Health Support
Support that listens and understands

Our team understands the unique challenges of behavioral health and works alongside you – from the sales process, to implementation, and to ongoing support – to ensure success.

Regulatory & Compliance Expertise
Proactive, prescriptive guidance

We develop features and offer guidance to help you stay ahead of industry changes and payer requirements.

Future-Ready Innovation
Investing in the future

We continuously invest in AI-driven documentation support, patient engagement tools, and clinical insights to help you work smarter.

Guidance that eases migration stress

"The support the ProsperityEHR team provided before, during, and after Go Live was tremendous and significantly decreased my anxiety about the migration!"

Jessica Rivera, LMFT, Clinical Director and Owner
Clear View Behavioral Services

Built for the Future: AI, Interoperability, and Security

In today's rapidly evolving healthcare landscape, outdated systems can't keep up. **ProsperityEHR is built with the future in mind.**

- ☑ **AI-Enabled Workflows –** Reduce documentation burden with automation and smart suggestions.
- ☑ **Interoperability & Open APIs –** Seamless data exchange with other EHRs, HIEs, payers, and referral partners using FHIR-based standards.
- ☑ **Security-First Design –** HIPAA-compliant and secure infrastructure with built-in safeguards against emerging cyber threats
- ☑ **Cloud-Native & Always Up-to-Date –** Automatic updates ensure you never fall behind on evolving regulations.

Let's talk about a better way. ProsperityEHR

Learn More

A strong EHR doesn't just improve clinical care—**it helps you run your business efficiently.**

☑ **Financial & Practice Management –** Integrated, automated revenue cycle tools help you **maximize reimbursements and reduce denied claims.**

☑ **Advanced Reporting & Analytics –** Unlock insights with clinical and operational reports tailored to **state-specific and payer requirements.**

☑ **Interoperability for Whole-Person Care –** Gain a comprehensive view of your patients with seamless health data exchange.

Make the right investment now and avoid future regret

Many legacy EHRs were designed decades ago and are struggling to keep pace with modern demands. Sticking with an outdated system means accepting inefficiencies, compliance risks, and unnecessary administrative burden.

We built **ProsperityEHR** to change that.

Human-Centered Design

Reduces learning curves and enhances usability, making onboarding and scaling easier.

Security & Compliance First

As cyber threats evolve, so do we. Our modern security framework ensures your data is protected.

Long-Term Solution

Unlike outdated platforms, ProsperityEHR is designed for technological adaptability and rapid change acceleration.

Now what? Take the next step.

All partnerships begin with a conversation, a "first date" to learn about each other and see if continuing the discussion feels right. The best way to understand how ProsperityEHR can **streamline your practice, improve provider experience, and support your growth** is to **see it in action.**

- **Meet with us for a virtual coffee.** We welcome the opportunity to learn about your practice!
- **Explore customer success stories.** Visit our website to see how practices like yours have transformed their operations.
- **Learn more about ROI.** Check out our blog: Considering Changing Technology? Make Sure It's Worth the Switch and our ROI calculator.
- **Get a personalized demo.** Let's walk through how ProsperityEHR can work for your unique practice needs. Tell us about your practice.

There's a better way to support behavioral health practices—and it starts with **ProsperityEHR.**