

2026 Digital Readiness Checklist

Your Complete Guide to Healthcare Practice Digital Transformation

Welcome to Your Digital Transformation Journey

This comprehensive checklist will help you assess your practice's digital readiness and create an actionable plan for 2026. Click each item as you complete it to track your progress.

How to Use This Checklist:

- Click on any item to mark it as complete
- Items are prioritized: High (immediate action), Medium (within 30 days), Low (within 90 days)
- Use the notes section at the end to document your findings and action items
- Print this checklist or save it digitally for your team meetings

1 Website Performance Audit

- Test Website Load Speed** HIGH
Use Google PageSpeed Insights to test mobile and desktop speed. Target: under 3 seconds
- Verify Mobile Responsiveness** HIGH
Test site on multiple devices (iPhone, Android, tablets). Check navigation, forms, and buttons
- Confirm SSL Certificate Active** HIGH
Ensure URL shows "https://" and padlock icon. Required for security and SEO
- Check for Broken Links** MEDIUM
Use tools like Broken Link Checker to find and fix all broken internal and external links
- Audit Contact Information Visibility** HIGH
Phone number, address, and email should be prominent on every page, especially header/footer
- Review Call-to-Action Buttons** MEDIUM
Ensure "Schedule Appointment," "Contact Us," "Book Now" buttons are clear and prominent
- Update Content Accuracy** MEDIUM
Review all pages for outdated information, old provider bios, or incorrect service details

2 EMR/EHR System Evaluation

- Assess Current System Integration** HIGH
Document which systems integrate: scheduling, billing, patient portal, communication tools
- Review HIPAA Compliance Status** HIGH
Verify BAAs with all vendors, conduct security risk assessment, review access controls
- Evaluate Telehealth Capabilities** MEDIUM
Check if EMR supports video visits, remote patient monitoring, and e-prescribing
- Test Patient Portal Functionality** MEDIUM
Ensure patients can access records, request appointments, send messages, and pay bills
- Analyze Staff Efficiency Metrics** Low
Track time spent on data entry, identify workflow bottlenecks, survey staff satisfaction
- Verify Data Backup Procedures** HIGH
Confirm automatic backups, test data recovery, document disaster recovery plan

3 Patient Communication Systems

- Implement Online Scheduling** HIGH
Allow 24/7 appointment booking through website. Integrate with practice management system
- Set Up Automated Appointment Reminders** HIGH
Configure text and email reminders at 7 days and 24 hours before appointments
- Enable Two-Way Text Messaging** MEDIUM
Implement HIPAA-compliant texting for appointment questions and non-clinical communication
- Create Automated Recall System** MEDIUM
Set up automatic reminders for patients due for routine visits based on recall intervals
- Develop Post-Appointment Follow-Up** Low
Send care instructions, check satisfaction, request reviews after visits
- Establish Communication Preferences** MEDIUM
Allow patients to choose preferred contact methods: text, email, phone, portal

4 Digital Marketing Strategy

- Optimize Google Business Profile** HIGH
Complete all information, add photos, post updates weekly, respond to all reviews
- Verify NAP Consistency** HIGH
Ensure Name, Address, Phone are identical across all online directories and platforms
- Implement Review Generation Process** MEDIUM
Create systematic approach to request reviews from satisfied patients
- Audit Website SEO** MEDIUM
Review title tags, meta descriptions, header tags, image alt text, and keyword targeting
- Analyze Traffic Sources** Low
Use Google Analytics to identify where website visitors come from and their behavior
- Review Social Media Presence** Low
Audit profiles, posting frequency, engagement rates, and follower growth
- Create Content Marketing Plan** Low
Create Content Marketing Plan

5 Operational Workflow Optimization

- Digitize Intake Forms** HIGH
Convert paper forms to digital. Allow patients to complete online before appointments
- Implement Electronic Signatures** MEDIUM
Use HIPAA-compliant e-signature tools for consents and documents
- Set Up Online Payment Processing** HIGH
Accept payments through website, patient portal, and text-to-pay options
- Automate Insurance Verification** MEDIUM
Implement real-time eligibility checks to reduce staff workload and claim denials
- Create Digital Document Management** MEDIUM
Scan and organize all documents digitally. Implement version control and access permissions
- Track Key Performance Metrics** Low
Monitor: patient acquisition, retention, no-show rates, average revenue per patient

6 Security and Compliance

- Conduct HIPAA Risk Assessment** HIGH
Document all potential risks to PHI. Create mitigation plans for identified vulnerabilities
- Verify All BAAs Are Current** HIGH
Ensure Business Associate Agreements with every vendor who handles PHI
- Implement Multi-Factor Authentication** HIGH
Require MFA for all systems containing patient data. Train staff on proper use
- Schedule Staff HIPAA Training** HIGH
Annual training required for all staff. Document completion and maintain records
- Update Privacy Policies** MEDIUM
Review and update Notice of Privacy Practices, website privacy policy, consent forms
- Test Incident Response Procedures** MEDIUM
Document breach notification procedures. Conduct tabletop exercises with team
- Review Data Encryption** HIGH
Ensure all PHI is encrypted at rest and in transit. Verify with all systems

Your Action Plan & Notes

Use this space to document your findings, priorities, and next steps:

- Example:
- Website speed test showed 5.2 seconds on mobile - needs immediate attention
 - Contact vendor about EMR integration with new communication platform
 - Schedule team meeting to discuss digital transformation priorities
 - Budget allocation: \$X for website redesign, \$Y for communication automation
 - Assign Sarah to lead HIPAA compliance audit

Ready to Transform Your Practice?

Don't tackle digital transformation alone. Our healthcare technology experts specialize in helping practices like yours implement these improvements strategically and efficiently.

[Schedule Your Free Consultation](#)