ACROSS THE TABLE

BUSINESS CONSULTING

INDUSTRY STACK 09 · HEALTHCARE PRACTICE

# The Healthcare Practice Stack

*Why this is the one stack on the list that names categories instead of products — and how to choose inside each one.*

Knowledge Article I09

AI Stack Series · acrossthetable.biz

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## WHO THIS IS FOR

You run a clinical practice: medical, dental, behavioral health, therapy, chiropractic, veterinary-adjacent services that handle patient records. You have patients, appointments, documentation, claims and a legal duty attached to every one of them.

This guide is deliberately different from the others. It will not hand you a shopping list, and you should be suspicious of any guide for this industry that does.

Read the non-negotiable section first. Everything else in this guide depends on it.

## START WITH THE WORK, NOT WITH THE APPS

These are not twenty lists of AI apps. Each stack starts with the jobs a particular business performs, then matches AI and conventional software to those jobs. Treat it as a menu to evaluate, not a shopping list.

For this kind of business the work runs in one line, start to finish:

> **THE PATH THE WORK TAKES**
> Patient → Appointment → Visit → Billing → Follow-up

Broken into the steps a customer actually moves through:

- Patient
- Appointment
- Intake
- Provider
- Documentation
- Billing
- Follow-up

Read that line left to right. A patient books, arrives, is seen, is documented, is billed, and is followed up with. Every step touches protected health information.

That is why the stack below names categories rather than brands. In every other industry on this list, you can pick a popular tool and sort out the details later. Here, the details decide whether the tool is lawful for you to use at all.

## THE STACK, PIECE BY PIECE

Every tool below is matched to one of those steps. You do not need all of them, and you should not buy all of them at once. Read the “What it is” column first and find the step where your business is losing the most time or money.

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| Tool | The step it covers | What it is | Price |
|---|---|---|---|
| HIPAA-appropriate EHR | Records and practice management | A system your industry approves for this job. | Varies by vendor |
| HIPAA-appropriate scheduling | Appointments | A system your industry approves for this job. | Varies by vendor |
| Approved patient communications | Messaging | A system your industry approves for this job. | Varies by vendor |
| Approved clinical documentation | Visit notes | A system your industry approves for this job. | Varies by vendor |
| Billing and claims platform | Revenue cycle | A system your industry approves for this job. | Varies by vendor |
| QuickBooks | Accounting | The small-business accounting standard — books, invoicing, reporting. | Per month by plan. |

Each row is a category, not a recommendation. Fill them in with vendors who will sign a business associate agreement and whose terms match your obligations. Your practice management vendor, your professional association and your malpractice carrier are better starting points than any list on the internet.

### What to watch out for in each one

None of these are reasons not to buy. They are the things owners tell us they wish they had known first.

- QuickBooks — Only as clean as your categorization habits.

## WHERE AI ACTUALLY FITS IN THIS BUSINESS

With properly contracted and configured tools: administrative documentation, scheduling assistance, approved patient communications, operational analysis.

In plain terms, that means:

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- Reducing documentation time with a clinical documentation tool that is contracted for healthcare use — not a general transcription app.
- Handling appointment reminders and routine scheduling messages through an approved patient communication system.
- Looking at operational patterns — no-show rates, schedule gaps, claim denials — using de-identified data.
- Drafting internal material that contains no patient information at all: policies, staff training, the plain-English explanation of a procedure for your website.
- Checking claim submissions for the errors that cause denials, inside a billing platform built for it.

The distinction that matters: a tool contracted for healthcare, with a signed agreement and the right configuration, can touch patient information. A consumer AI app cannot, no matter how careful you are with what you type. There is no careful way to use the wrong tool.

## NON-NEGOTIABLE

HIPAA, signed BAAs, minimum-necessary access, security, audit trails and clinical human oversight. Never put patient information into a consumer AI app because it is convenient.

What a business associate agreement actually does is make the vendor legally accountable for protecting the information you give them. Without one, the responsibility stays entirely with you, and so does the liability.

Practical test before any tool touches patient data: will they sign a BAA, where is the data stored, who at the vendor can see it, is it used for training, what is the breach notification process, and what happens to the data if you leave? If a vendor cannot answer all six in writing, that is your answer.

## WHAT TO SET UP FIRST

Do these in order. Finish one before you start the next. Most owners who try to do all of it in one month end up using none of it.

1. **Start from your records system, not from AI** Your practice management and records platform determines what else is possible. Everything connects to it or does not.
2. **Get the agreements in place** Before any new tool touches patient information, the business associate agreement is signed and filed. This is a five-minute habit that prevents the worst day of your professional life.
3. **Fix scheduling and reminders** No-shows are the most common and most fixable revenue loss in a small practice, and approved reminder systems are well established.

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4. **Then look at documentation** Clinical documentation assistance is where the real time is, and it is also where the compliance requirements are strictest. Do it properly or not yet.
5. **Keep the business side separate and simple** Accounting and general business tools do not need to touch patient data at all, and should not.

## WHAT IT COSTS TO START

Healthcare software costs more than equivalent general business software, usually per provider per month. The premium pays for the compliance posture — the agreements, the audit logs, the access controls — which is exactly what you are buying.

The cost to compare against is not another vendor's price. It is the cost of a breach, which includes notification, regulatory response, and the practice you would not have afterwards. That comparison makes most compliance premiums look small.

Documentation assistance is usually priced per provider and judged by minutes saved per visit. Measure it on your own visits for a month before you roll it out to everyone.

The price column in the table above tells you how each one charges — per user, per location, per contact, or a percentage of every sale — not what you will pay. That is deliberate. The charging model is what decides whether a tool stays affordable as you grow, and it is the part that does not change every quarter. Get the current dollar figure from the vendor's own pricing page before you budget.

## THE RULES UNDERNEATH ALL OF IT

Legal · Privacy · Data protection · Security · Compliance · Records · Audit · Risk · Human oversight — underneath every one of the twenty stacks, not an afterthought.

Protected health information is governed by law. Signed business associate agreements, minimum-necessary access, encryption, audit trails and a breach response plan are requirements, not best practices.

Clinical human oversight does not transfer. Anything a tool drafts about a patient is reviewed and accepted by the clinician, who remains responsible for it.

Access control is ongoing, not one-time. Staff change roles and leave; access lists need reviewing on a schedule.

Your state may add requirements beyond federal rules, particularly for behavioral health, minors and substance use records. Those are stricter, not looser.

Never put patient information into a consumer AI app. There is no configuration of a personal chatbot account that makes this acceptable.

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## MISTAKES THAT COST THE MOST

- Trying a general AI tool "just to see" with real patient notes.
- Signing up for a tool before the business associate agreement exists.
- Assuming a vendor is compliant because their marketing says healthcare.
- Leaving access in place for staff who left.
- Choosing a documentation tool on time saved without checking the clinical review workflow.

## THE CEO DECISION

- Does every vendor touching patient data have a signed agreement on file?
- When did you last review who has access to patient records?
- What is your no-show rate, and what is it costing you a month?
- How many minutes per visit go to documentation, and what would ten back be worth?
- If a breach happened tomorrow, do you know the first three steps?

## YOUR QUICK REVIEW

- ☐ Every vendor touching patient data has a signed BAA on file.
- ☐ Access to records is reviewed on a schedule.
- ☐ No patient information has ever gone into a consumer AI app.
- ☐ A clinician reviews everything a tool drafts about a patient.
- ☐ There is a written breach response plan and staff know it exists.

## ADDITIONAL RESOURCES

| Tool | Where to find it | What it is for |
|---|---|---|
| QuickBooks | quickbooks.intuit.com | Clean books your accountant already knows how to read. |
| Across the Table AI Assessment | acrossthetable.biz/#assessment | Fifteen minutes. Tells you which job to start with before you buy anything. |
| The Scaling Edge | acrossthetablebiz.substack.com | Weekly newsletter for owners without a business background. |

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### Go deeper on the pieces

Each of these is a full guide comparing the three tools that do that job:

- Manage the money — acrossthetable.biz/knowledge-articles/manage-the-money/ (covers QuickBooks)

## CONTINUE LEARNING

The Across the Table AI Assessment takes fifteen minutes and starts from the work the practice performs, not from a product list.

For the business side of the practice, the guides above cover the general tools in plain language.

## READ AND CONNECT WITH ACROSS THE TABLE

Across the Table website: https://acrossthetable.biz

The Scaling Edge newsletter: https://acrossthetablebiz.substack.com

YouTube: https://www.youtube.com/@AcrossTheTableConnie

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