

Clinic AI Starter Checklist

A practical checklist for chiropractic and wellness clinics adding marketing and AI tools · PracticeRated · October 2026

1. HIPAA / BAA checks (before any patient data goes in)

- ☐ Get a signed Business Associate Agreement (BAA) from every vendor that stores, texts or emails patient information. A vendor saying "we're secure" is not a BAA.
- ☐ Check whether HIPAA costs extra. Example: GoHighLevel says it is "not HIPAA compliant by default" and its HIPAA add-on is \$297/mo on top of the plan.
- ☐ Check which plan includes the BAA. Example: ActiveCampaign offers a BAA "on eligible plans," and its plan overview lists HIPAA support under Enterprise.
- ☐ Don't upload patient lists to tools that won't sign a BAA. Mailchimp's Acceptable Use Policy prohibits uploading regulated sensitive personal information.
- ☐ Remember that a review request or reactivation text confirms someone is your patient, so treat it as patient data.
- ☐ Never confirm someone is a patient, or mention their care, when you reply to an online review.

2. Quick wins

- ☐ **Reviews:** automate a review request by text or email after each visit, with a direct link to your Google profile.
- ☐ **Reactivation:** pull patients who haven't had a scheduled appointment in 6–12 months and run a short recall sequence through a tool that signs a BAA.
- ☐ **Missed calls:** measure how many calls go unanswered, then trial an AI or virtual receptionist and ask for a human handoff option.

Tool (verified Oct 14, 2026)	Published price	BAA status (per vendor)
ActiveCampaign	From \$15/mo (billed annually); Enterprise \$145/mo	On eligible plans (Enterprise lists HIPAA support)
GoHighLevel	From \$97/mo + \$297/mo HIPAA add-on	Yes, with the add-on
NiceJob	\$75 / \$125 per month	Unknown, so ask
Podium	\$399 / \$599 per month	Included in its terms for covered entities
Solutionreach	Quote only	Acts as your business associate
Birdeye	Quote only	HIPAA page includes BAA terms

3. Questions to ask every vendor

- ☐ Will you sign a BAA, and on which plan? Is HIPAA an extra fee?
- ☐ Does it integrate with my EHR or scheduler (ChiroTouch, Jane, ChiroFusion, etc.)?
- ☐ What's the full monthly cost, including usage fees (texts, minutes, AI) and setup?
- ☐ Contract length, cancellation terms, and can I export my data if I leave?
- ☐ For receptionists: how fast are missed calls texted back, and is there a human handoff?
- ☐ Can you show results from a chiropractic or similar clinic?

Prices and terms come from vendor websites as of October 14, 2026 and may change, so confirm with each vendor. This is not legal or HIPAA-compliance advice. Full comparisons are at practicerrated.com/guides.html. Some links on our site are affiliate links, and they never change our scores.