



AI-OPTIMIZED PRACTICE

Free resource · Directory data as of 2026-10-15

HIPAA-safe AI checklist & BAA status cheat sheet

For solo and small healthcare practices

A practical checklist for adding AI to admin work without putting patient data in the wrong place — plus a snapshot of which tools in our directory offer or report a Business Associate Agreement, with published pricing tiers.

79 tools reviewed · 20 with a clear BAA “yes” · 12 reported · Source: <https://aioptimizedpractice.com>

Not legal, compliance, or clinical advice. BAA status and pricing come from vendor sites and third-party reviews as of 2026-10-15 and change often. Confirm every fact in writing with the vendor and your own advisor before any protected health information goes into a tool. Never send patient information to AI-Optimized Practice.

1. HIPAA-safe AI checklist

Disclaimer: This is general education for administrative workflows only. It is not a substitute for legal counsel, a privacy officer, or your own HIPAA risk analysis.

☐ Know what counts as PHI

Names, dates of birth, medical record numbers, visit notes, call recordings with patient identifiers, and appointment details tied to a person are all protected health information under HIPAA.

☐ Match the BAA to the exact plan

A BAA on an Enterprise plan does not cover a Free or Clinician tier. Confirm the signed agreement names the product and plan you will actually use.

☐ Sign before PHI goes in

Do not record patient calls, upload notes, or paste chart text into a tool until the BAA for that plan is signed and filed.

☐ Prefer admin workflows first

Start with phones, intake forms, scheduling, and billing paperwork. Keep clinical decision-making with the licensed clinician.

☐ Human review is required

AI drafts notes, emails, and prior-auth packets. A person reviews and signs or sends every item that goes into the chart or to a payer.

☐ Get patient consent for recording

Ambient scribes and call recording need a consent process that matches your state rules. Document how you obtain and store consent.

☐ Check retention and deletion

Ask how long audio, transcripts, and form data are kept, who can access them, and how you request deletion or export.

☐ Keep consumer AI off PHI

Free ChatGPT, Claude.ai free/Pro consumer accounts, Gemini consumer, and similar tools do not cover PHI. Use only BAA-covered workspace or healthcare plans for any patient text.

☐ Secure your practice email first

Move practice email to a paid Google Workspace or Microsoft 365 plan and sign their BAA before using AI drafting features on that mail.



Track vendors in one place

Keep a simple list: tool name, plan, BAA date, who signed, and last review date. Re-check pricing and BAA status when you renew.

Quick rule of thumb: If the tool can see, store, or transmit anything that identifies a patient, you need a signed BAA that covers that exact product and plan — before you turn it on.

2. How to read BAA status in our directory

- BAA available** Vendor states a BAA is included or available on the plans we checked.
- BAA reported** Third-party reviews or secondary sources report a BAA; still confirm with the vendor.
- BAA on some plans** Available only on higher tiers, on request, or via enterprise contract.
- BAA unverified** We could not confirm status from public sources as of the check date.



3. Tools with a clear BAA “yes” (20)

These listings say a BAA is included or available on the plan(s) shown. Still confirm the agreement covers your exact tier.

Tool	Published pricing (snapshot)	BAA note
MedBridge Ops Billing & Prior Auths	Starter \$399/mo annual (\$499 monthly) up to 100 PAs; Growth \$1,039/mo...	Yes – BAA included on every plan (vendor site)
DeepCura Documentation & AI Scribes	\$129/provider/mo or \$999/yr; volume discounts for 3+ seats; free tria...	Yes – BAA with every customer (vendor site)
Freed Documentation & AI Scribes	Starter \$39/mo (40 notes), Core \$79/mo, Premier \$119/mo or \$104 annua...	Yes – reported on paid plans; org-wide BAA on Groups plan (third-party reviews)
Twofold Health Documentation & AI Scribes	Free plan; Personal \$69/mo or \$49/mo annually	Yes – 'BAA on every plan' per vendor pricing page (as reported)
PracticeQ (IntakeQ) EHR & Practice Management	Practice Management \$84.90/mo; low volume \$59.90/mo (vendor site)	Yes – HIPAA BAA included (vendor site)
SimplePractice EHR & Practice Management	Starter \$49/mo, Essential \$79/mo, Plus \$99/mo; extra practitioners on...	Yes – BAA accepted at signup (third-party review)
TherapyNotes EHR & Practice Management	Solo \$69/mo; Group \$79/mo first clinician + \$50 each additional; non-...	Yes – built into Terms of Service since April 2026 (third-party review)
BastionGPT Inbox & Email	Reported \$20–\$75/user/mo; 7-day trial	Yes – signed BAA (vendor site)

Tool	Published pricing (snapshot)	BAA note
ChatGPT for Healthcare / Enterprise Inbox & Email	Sales contact	Yes – only on listed eligible products; not Free/Plus/Business (OpenAI Help Center)
Google Workspace + Gemini Inbox & Email	See vendor site	Yes on eligible Workspace plans when signed; consumer Gemini not covered (third-party matrix)
Microsoft 365 Copilot Inbox & Email	See vendor site	Yes – Microsoft BAA via DPA for in-scope services (Microsoft Learn)
OhMD Inbox & Email	Core from \$300/mo; AI & Automation from \$500/mo; calling usage billed...	Yes – automatic BAA for every user covering texting, voice, video, forms and file sharing (vendor site)
Paubox Inbox & Email	See vendor site	Yes – vendor signs BAAs (vendor site)
FormDoctor Patient Intake	Core / Complete / Growth / Enterprise; most plans reported ~\$99–\$299...	Yes – signed BAA included on every plan (vendor site)
IntakeQ Patient Intake	\$29.90/mo (10 submissions), \$54.90/mo Forms Only, \$84.90/mo Practice...	Yes – HIPAA BAA included on plans (vendor site)
Jotform (HIPAA) Patient Intake	Gold reported \$129/mo or \$99/mo billed annually	Yes – on Gold or Enterprise after enabling HIPAA (vendor FAQ)
DeskMD Phones & Scheduling	\$299/provider/mo Standard, \$449 Pro; 14-day free trial (vendor site)	Yes – signed BAA on every account (vendor site)
Echo Phones & Scheduling	Base \$499/mo or \$449/mo yearly; Pro \$599/mo or \$539/mo yearly; one-ti...	Yes – signed BAA before go-live, included at every size (vendor site)
Phone Stack Phones & Scheduling	Growth \$199/mo (1,000 min), Scale \$399/mo; plans from \$69/mo (vendor...	Yes – on Scale and Enterprise plans only (vendor site)
Retell AI Phones & Scheduling	Usage-based, \$0.07–\$0.31/min; \$10 free credits (vendor site)	Yes – self-service BAA portal (vendor site)

4. Tools with a reported BAA (12)

Secondary sources report a BAA. Treat these as leads to verify, not as confirmation.

Tool	Published pricing (snapshot)	BAA note
Blueprint Documentation & AI Scribes	Reported \$0.99/session with your EHR, \$1.49/session all-in-one	Reported yes – automatic (third-party review)
DeepScribe Documentation & AI Scribes	Quote only; third-party estimates ~\$350–\$500+/provider/mo	Reported yes – BAA referenced in vendor terms; confirm on contract (vendor terms / third-party reviews)
Doximity Scribe Documentation & AI Scribes	Free for verified clinicians	Reported yes (verify in Doximity's FAQ)
Heidi Health Documentation & AI Scribes	Free plan; Clinician \$150/mo or \$110/mo annually	Reported only on the Practice tier (~\$180/user/mo) – not on Free or Clinician (third-party review)
Mentalyc Documentation & AI Scribes	Reported \$14.99–\$99.99/mo billed annually, note-capped	Reported yes (third-party review)

Tool	Published pricing (snapshot)	BAA note
Nabla Documentation & AI Scribes	Sales-led; reported from \$119/provider/mo	Reported on paid plans only – not the free tier (third-party reviews)
Sunoh.ai Documentation & AI Scribes	From \$149/mo 'for a limited time' (as reported)	Reported included (third-party review)
Upheal Documentation & AI Scribes	Free basic notes; \$39/mo unlimited AI Notes (third-party review)	Reported yes (third-party review)
CompliantChatGPT Inbox & Email	Paid plans; see vendor site	Reported on paid plans (third-party)
Assort Health Phones & Scheduling	Quote only	Reported yes – signed BAA with every client (third-party review)
Central Phones & Scheduling	Reported \$89/mo for 90 calls; 10-day trial (third-party review)	Reported yes – BAAs executed with customers handling PHI (third-party review)
Talkie.ai Phones & Scheduling	Quote only	Reported yes (third-party review)

5. BAA only on some plans / on request (6)

Tool	Published pricing (snapshot)	BAA note
EasyPA Billing & Prior Auths	UM Helper \$50/user/mo; Pro \$250/clinic/mo (vendor site)	On request (vendor site)
Abridge Documentation & AI Scribes	Not published; sales contact	Via enterprise contract (third-party review)
Microsoft Dragon Copilot Documentation & AI Scribes	Per-user price not published; pay-as-you-go \$0.25/session reported	Via Microsoft (third-party review)
Suki Documentation & AI Scribes	Not published; sales contact	Via contract (third-party review)
Claude Enterprise (Anthropic) Inbox & Email	Sales contact	Only on Enterprise or eligible API; not Free/Pro/Max/Team (third-party)
RingCentral AI Receptionist Phones & Scheduling	Reported from \$39/license incl. 100 minutes (third-party review)	Requested per account – confirm before use (third-party review)

6. What to ask every vendor

1. Will you sign a BAA for the exact plan and add-ons we are buying?
2. What data is covered (notes, audio, call recordings, form uploads, emails)?
3. Where is data stored, and who are your sub-processors?
4. How long do you retain audio and transcripts, and how do we request deletion?
5. Is any data used to train models? If so, on which plans can we opt out?
6. How do we export our data if we leave?

Full live directory with updates: <https://aioptimizedpractice.com> · Machine-readable data: <https://aioptimizedpractice.com/tools.json>
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