# IMPLEMENTATION STEP BY STEP OUTLINE

| TASK | OBJECTIVE |
|---|---|
| Pre-Implementation Tasks | |
| Assign VAR Project Manager to the project | Assign VAR Project Manager to oversee implementation process |
| Obtain SuiteMed ID from SuiteMed | This is required to register the client with Meditab and also used for sending files to ENS if used as a clearing house |
| VAR Project Manager and Sales Rep to meet and review product and services the client has purchase | Enables Project Manager to better perform their job |
| Project Manager to contact new client | Project Manager to contact client for introductions and to gather contact information |
| Inform Meditab Medical Team of client and their specialty | Meditab medical team will provide specialty templates and verify that they are satisfactory to load on clients |
| Confirm AutoBack Up Path | Setup auto backup feature |
| | |
| Obtain Copies of Client Documentation | |
| Samples of CMS1500 formats | This will give the ability to set CMS1500 like for like in IMS |
| Superbill/Encounter Form | To set ICD10 and CPT templates |
| Lab requisitions | To scan lab forms into IMS so the provider can complete in an electronic format |
| Physical documents | Forms, such as work or school physicals, can be scanned into IMS so the provider can complete in an electronic format [if possible print to image and attach image for more clear clean documents] |
| Careplans and any other documentation relevant to client's specialty | Patient instructions – prefer in word documents as this can be copied and pasted |
| Copy of logo in jpeg | This will become the client's letterhead image to be printed on letters, careplans, visit notes |
| Check-In documents, i.e. HIPPA agreement | These can be scanned into IMS to be accessible when the patient is checking in. Patient can complete these electronically or as a hard copy which can be printed at check-in and re-scanned to the patients chart |
| Check-Out documents | As above |
| Visit Note documents | These will be used to create customized templates for the practice |

| Software Installation and Clearing House Set Up | |
|---|---|
| Review hardware/network questions and office layout | Project Manager should review the hardware, network and office layout with client's network and hardware provider to make sure items are connected and working effectively |
| Discuss with Medical Team what templates should be loaded | Specialty templates should be loaded and verified by Meditab Medical team |
| Install Logmein on all computers | VAR to access computers and install Logmein |
| Schedule installation of IMS | Schedule with Meditab implementation team when IMS will be loaded |
| Prepare HL7 interface with lab | Discuss with Client how they can interface with the lab(s) of their choice. |
| Gather Fax Information | Obtain fax line number, ask client how many ports are required |
| Order Fax Server (if using Meditab Fax Server) | CONFIRMING WITH Ty |
| Install Fax Server Application | ? |
| Modem Configuration | ? |
| Testing Fax Server | ? |
| Identify key person at Client's Site for Database Conversion | Discuss with Practice Project Manager who will be responsible for mapping and overseeing database conversion (this is normally the Client Project Manager) |
| Obtain current software information | Discuss with Vaibhav and connect to |
| Re-Negotiation of data conversion agreement | Discuss with Practice Project Manager what needs to be converted and re-negotiate the price with Vaibhav if required |
| Determine the timeline for the conversion | Discuss this with Vaibhav |
| Obtain ASCii tab delimited file | ? |
| Data Conversion Process | To be completed by Meditab team |
| Client to verify date at 15% minimum | Inform Practice Project Manager that they must confirm acceptability of converted data |
| Alt-Check ANSI File format for Clearing House | |
| Clearing House Identification | Discuss which clearing house the |
| ENS – Clearing House Registration (if applicable) | Send Practice Project Manager documentation for how to register with ENS |
| ERA Registration | Confirm with Practice Project Manager if ERA is going to be required and prepare for set up with HIral |
| Alt EDI Database setup | ? |
| Alt Send test Batch to verify the file format | ? |
| ENS Database setup | Contact Hiral at Meditab to arrange for this set up |
| ENS Send test Claims | Hiral and Practice Project Manager should work on sending test claims |
| ENS – Verify Registration for Non-Commercials and ERA | Hiral to work with Practice Project Manager |
| Billing and Office Flow Analysis | |

SuiteMed
Beyond EMR

| Schedule Training | |
|---|---|
| Sending Claims | |
| Super User: Office/Security/MOT/Schedule | |
| Super User: Billing | |
| Super User Documents and Letters | |
| Super User: Prescription and Lab Set up | |
| Overview/Online Help – entire office | |
| Physician Training – Physicians and MLPS | |
| Scheduler Training – Front Desk Staff | |
| Reminders, Notes, My Tasks, and Chart View | |
| Visit Note/Patient Flow Training – Physicians | |
| Scanning and Document management Training | |
| Billing Training and Overview | |
| Billing Training Charge Posting – Biller | |
| Billing Training Claims – Biller | |
| Send e-mail to Financial Department | Send e-mail to Anajali client go-live date |
| **GO LIVE AND POST GO-LIVE** | |
| GO LIVE WEEK | On-site implementation |
| Review any other outstanding training requirements based on remaining training hours | |
| POST GO LIVE WEEK | Contact Practice Project Manager on a daily basis to assist with any issues that the practice maybe facing |
| Client Satisfaction - 1st Month Post Go-Live | Set up weekly meetings with Practice Project Manager to review any outstanding questions and concerns for first month post go-live |
| Client Satisfaction - 2nd to 3rd month Post Go-Live | Set up monthly meetings with Practice Project Manager to review any outstanding questions and concerns |