Implementation Timeline

Week	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1		**Kick-Off Meeting**	< Client begins organizing teams and collecting data >		
	"Week One" begins when the Practice submits the "Practice Information" form and completes the Implementation Kick-Off call.				
Week 2			Facilities & User Forms Submitted	**Weekly Check-In #2**	*Billing Integration Kick Off Due
	Key Items- Facility Import Form, User Import Form, Billing Integration Kick Off, EDI Enrollments * Admin/Super user training & system access cannot be granted until these forms have been received AND they have been uploaded to the server (EHR)				
Week 3		**90 Minute EHR Admin Training**	CCDA Test Files Submitted	**Weekly Check-In #3**	
	Weekly Check In – Review Account Options (MIPS, ACO, Dictation, eRX, Etc.)				
Week 4			Several Items due here*	**Weekly Check-In #4**	
	Several items will be due this week and there may be additional meetings requested depending on the complexity of the account. ***Delays at this point CAN impact Go-Live.**				
Week 5				< Deadline to make changes prior to training! >	
			Patient Import Due	**Weekly Check-In #5**	**Account Review Due**
	This week: final reviews of the server and the account Access to the Online Learning Management System sent to users this week.				
Week 6	< RCM Software – Billing Team Training > < EHR- End User Training (Can be role based depending on size) >				
				Weekly Check-In #6	
	Training Week! Training Sessions based on practice needs/size. Confirm Billing Integration, Note Delivery, User Assignments				
Go-Live	**"Office Hours"**			**Weekly Check-In #7**	
	RCM Software – Billing Team Training part 2 will be 2-3 days after go-live				

*Days of meetings are only examples to demonstrate the timeline

Week One: Getting Started

Implementation begins after the **Practice Information Form** is submitted and the **Kick-Off Call** is completed.

Important for RCM Clients

- Ensure all form details **match Medicare's records**—errors may delay implementation.
  (PECOS –Approved Medicare Enrollment Record Verification Page is a great place to find this)

Kick-Off Call Agenda (EHR & RCM)

- Review **practice-specific setup requirements**
- Choose a **server name**
- Discuss required information and files
- Schedule the **recurring weekly check-ins** (adjustable as needed)
- Establish **key points of contact:**
  - IT Contact (Practice)
  - IT Contact (Billing company, non-RCM clients only)
  - Practice Administrators (Decision-makers for system setup)
  - Clinical Administrators (Workflow and customization leads, distinct from "Super Users")

Action Items Before Next Call:

- User Import Form (EHR)
- Facility Import Form (EHR & RCM)
- Account Invoice Form
- Email & Fax Configuration Form
- Schedule RCM Software IT Call (if applicable)
- Identify & Submit Key Contact Information

Week Two: Key Steps & Requirements

Key Event – RCM/EHR Integration Kick-Off **(For EHR-only or RCM-only clients)**

Introduce the implementation team to **your RCM software IT or EHR software IT** team during Week 2.

Why? External integrations can **significantly impact the Go-Live timeline.** Early coordination ensures a smooth process.

Weekly Check-In Topics:

EHR Admin Training

- If **Facility & User Import Files** are received, we will schedule **EHR Admin Training** for operational and clinical administrators.
- This training helps **decision-makers** (not all admin users) understand **system setup, workflows, and clinical customizations.**

RCM-Specific Requirements

- If the **Submitter ID** has been received, we will begin the EDI enrollment process.
- **EDI enrollments impact RCM Go-Live.**
- Ensure all submitted information is **accurate and formatted correctly to prevent delays.**
- **Contact your RCM Implementation Specialist** with any concerns early to avoid delays.
- **Instamed (Patient Statements)** – this needs to be started EARLY in the process for a smooth implementation.

Action Items Before Next Call:

- Complete any **outstanding** Week 1 tasks
- Submit **10-20** test CCDA files via **secure messaging**

If EDI enrollments have been started- Signatures/special instructions should be submitted

Week Three: Key Tasks & Check-In Focus

Due This Week:

- **Complete any outstanding items from Weeks 1 & 2**
- **RCM:** Fee Schedule, Payor Import File, Provider Import File
- **EHR:**

  Complete **high-level admin training** to begin workflow and customization setup.

  Review of **CCDA test results**

Weekly Check-In Topics:

Review Account Options (MIPS, ACO, Dictation, eRX, etc.) and establish deadlines.

Review any outstanding files

Week Four: Key Tasks & Check-In Focus

Implementation begins after the **Practice Information Form** is submitted and the **Kick-Off Call** is completed.

⚠ **All outstanding items must be submitted this week to avoid Go-Live delays!**

Due This Week:

- MIPS Measures
- Customization & Note Type Requests
- Send ePrescribing Invites
- Submit PointClickCare Connection Requests

Anything outstanding for RCM

Training & Setup:

Setup Admin Training

- **RCM Software:** Key admins (1-2 per practice) responsible for system management. (Not applicable to billing services clients.)
- **RCM Services** – Schedule SOP Review Call
- **EHR:** Includes users managing the server & EHR Super User Training

Weekly Check-In Topics:

- Customizations/Note Types
- Imports
- Add-On Services (MIPS, ACO, etc.)
- RCM Status
- Review any "risks" to Go-Live

Week Five: System Setup & Final Preparations

Due This Week:

- **Patient Import**
  - **1 for RCM**
  - **1 for EHR** (Cannot use the same file for both systems—details to follow)
- 1st Round of CCDA Imports
- 1st Round of File Attachments
- Send invites for End-User Training (EHR & RCM, as applicable)

Complete all outstanding items to avoid Go-Live delays!

ePrescribing Setup: Ensure **provider accounts** are ready and **clinical admins** are trained.

Practice Admin Tasks:

- **RCM Software:** Admins should actively **map the account** (per admin training).
- **RCM Services:** Admins training depending on the needs of the specific practice, usually service clients get admin training after go-live so the account has more data available.
- **EHR:** Admins should review **facility note delivery, provider assignments, and system setup.**

Weekly Check-In Topics:

- Review system readiness before training begins next week.
- Discuss any outstanding items.

Week Six: End-User Training & Final Reviews

Due This Week:

- 2nd Round of CCDA Imports
- 2nd Patient Import (EHR - to fill gaps between import dates)
- Submit File Attachments
- Review Final Note Types & Customizations

Final System Readiness Checks

- **Implementation Team:** Confirm **Billing Integration is ready for Monday.**
- **Practice Team:**
  - **RCM Software:** Finalize **account mapping, setup, and user roles.**
  - **RCM Services:** Confirm **all required information has been submitted.**
  - **EHR:** Verify **note delivery, PDF configuration, and provider assignments.**

Week Seven: Go-Live Support

- EHR Office Hours: Optional **live support call** can be scheduled based on practice needs.
- RCM Software Billers: **2nd training session** will take place **2-3 days after Go-Live.**

Questions? Contact your Implementation Specialist!