actiVEHR™

Introduction to
activEHR Implementation

key success factors

Dear activEHR Customer:

Studies of successful application implementations indicate that completely understanding and accepting need for change, managing staff expectations, appropriate resource allocation to facilitate application set up and learning, and properly documented business requirements are key success factors. Whether migrating from paper-based operation or a legacy application, proactive planning in managing change is a critical success factor in all Go Live transitions regardless of the size of the business/office.

As you know, new things will come because you're embarking on this journey with the future in mind. At EMR*logic* we will help your team in a successful transition to activEHR to ensure an efficient implementation and ensure long-term optimized use of the application.

In this journey, your success is our success and your obstacles are truly our obstacles. Working together, we will ensure that your business and patients fully benefit from the best eye care application solution on the planet!

We thank you in advance for the opportunity to serve you.

Respectfully,

Client Services Team
EMRlogic Systems Inc.

Application Implementation Overview

As soon as you become an activEHR customer a dedicated Implementation Manger will be assigned to you and will become your main point of contact for the duration of the transition.

Based on the size of your business/practice the required investment in ensuring a successful transition to activEHR could take 10-40 total hours of office time plus 5-15 hours of learning time per end-user based on their roles.

Following are the key steps in completing activEHR Implementation. Once the first step is completed most of the remaining steps can be started simultaneously expediting the entire process.

1. **Kickoff Call**
   Your assigned Implementation Manager will arrange a Kickoff Call. We recommend that along with the practice/ owner, office manager, and other key staff joins us on this call. We need to understand their roles as well as expectations and any concerns. During the call your Implementation Manager will provide high level overview of implementation process as well as roles & responsibilities in carrying outs tasks for both parties. We will also discuss assigning super user(s) and a projected Go Live time frame and key steps to complete the transition.

2. **Business Requirements Scoping**
   Follow up calls will be scheduled with office manager/key staff to ensure that we fully understand all your front desk, back office/billing, optical, recalls, reporting, and patient workflow requirements. Based on the size of your business multiple calls may be required to properly document these needs. It is imperative that all requirements are identified as this will impact the time it takes to configure the application and workflow for a smooth Go Live.

3. **Learning Program**
   At EMRlogic, we consider initial learning sessions to be just the beginning of an important and long-term learning process. Helping your team get off to a good start is very important as first impressions can last a long time. Your Implementation Manager will develop a learning plan that meets specific needs for each member of your office staff as well as doctors. Online videos and live webinars kick off the learning process. Once the application has been installed your team can start hands-on exercises and quizzes in a pre-configured sandbox environment.

4. **activEHR Installation**
   This process can start shortly after the Kick Off Call. Your Implementation Manager will arrange for an appointment with our technical specialist to ensure your hardware/network meets our minimum requirements. Once we have confirmed the hardware/network set up we will move forward with activEHR installation. Once activEHR is installed and running on all workstations we will also manage linking of

bar code reader, printers, and scanners. If you are a Cloud customer your Implementation Manager will facilitate secure access to EMRCloud once we have validated Internet speed and workstation specifications.

5. **Insurance Clearing House Set Up**
Your Insurance claims clearing house set up must be completed for electronically submitting your insurance claims to payers through activEHR. If your office is presently using a clearinghouse, you will need to notify them about migrating to activEHR. If you will be signing up with a new clearing house be aware that the registration process, particularly with your payers, can take up to 3-6 weeks. Therefore, this process should be stated shortly after the Kick Off call. We highly recommend signing up with Gateway EDI, our only official clearing house partner.

Gateway EDI: Phone: 800-556-2231   Web: www.gatewayedi.com

6. **Application Configuration & Workflow set up**
This will involve set up of office specific items such as Provider Schedule, Fee Schedules, Inventory Count Pricing, office & patient workflow etc. This process will start as soon as activEHR has been installed and your key staff has completed initial learning sessions.   Please note that completing these steps will require time and effort from your staff and your Implementation Manager will proactively guide your team to achieve this.

7. **Data Conversion & Input**
Our Technical Specialist will import your legacy patient demographics data into activEHR. Your team will be actively guided by the implementation manager to ensure speedy data entry for your patient appointments, insurances information, and guarantors etc, into activEHR.

8. **Instrument Linking**
activEHR™ can be linked to Refractive and Imaging instruments in your pre-test and exam lanes to facilitate the electronic transfer of instrument readings and pictures. We require manufacturer approved cables to ensure smooth integration.

9. **Go Live Readiness Assessment**
Before your Go Live, we ensure that all setup work is complete, test data import has been validated, and that every staff member has reached the required competency level to use activEHR. We will send weekly Report Cards to grade overall implementation progress as well as possible obstacles that could hinder overall transition all the way to the Post Go Live transition.

10. **Go Live!**
Your Implementation Manager will guide you through the implementation to Go Live Transition and stay close after your Go Live day. We can also provide onsite Go Live support. Your sales account manager will be happy to discuss your needs and provide pricing details.

Here is an overview of the tasks that need to be completed as part of your implementation in a visual format. All items above the timeline-arrow are EMRlogic tasks and all items listed below the timeline arrow are tasks done by your team.
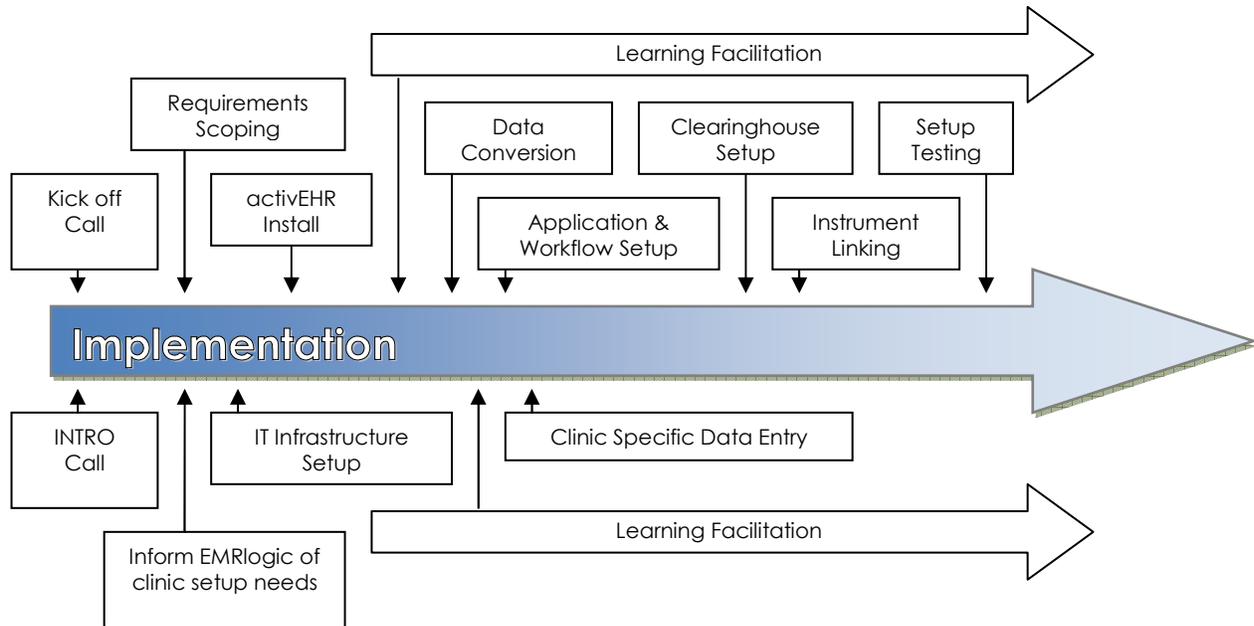
Post Go-Live Support

Go Live Day is an important milestone in your journey in transitioning to a new application; however, it is not the final destination. At EMRlogic we appreciate that you will need ongoing assistance because regardless of how successful a Go Live experience new challenges may arise.

Our support team works 24/7 and by using HIPAA complaint remote access and screen sharing tools is able to see your problem and, when necessary, take control of your computer to fix the issues.

Ongoing Software updates will be downloaded to your system remotely by our Technical Specialists. We will do all application updates and maintenance work after hours to minimize disruption to your business and patient care.