

Introduction To SOFTWARE IMPLEMENTATION



OD PROFESSIONAL
ENTERPRISE 2008
Improving patient outcomes

 **EMRlogic**
systems inc. • *Driving Flawless Consistency*

powered by  **CACHE**

Welcome to OD Professional

It is an honor and a pleasure to welcome you to the fast growing OD Professional community.

We endeavor to develop a long-term partnership with all our clients and will do whatever necessary to make your OD Professional implementation a smooth process for your entire staff. Over the last two decades we have assembled an experienced team of experts in the eyecare and IT industries and welcome the opportunity to guide you through this transition.

Change is always challenging in the IT world and migrating to a more robust application is no different. We realize there is anxiety and curiosity associated with any major change and that, in an extreme case, some team-members may even question the need for a change. As you know, new things will come because you're embarking on this journey with the future in mind. We will strive to engage each and every one of your staff in a healthy discussion. We welcome your questions and concerns and will answer them in an in-depth and proactive fashion.

Feedback from our clients indicates that open communication and understanding of your expectations and requirements is the most important first step. Our experience tells us that the key to a successful migration is to make all team players feel involved by making them valuable stakeholders in the process.

With that in mind, please accept my invitation to consider each OD Professional employee an extension of your own team. Your success is our success and your obstacles are truly our obstacles. Software implementation is a marathon and surely not a sprint. Working together we will ensure that your business fully benefits from the best optometry software solution on the planet.

My team and I look forward to the opportunity to serve you.
Respectfully,

Tariq Rasheed

VP Client Services
OD PROFESSIONAL Team

Vision Statement:

At OD Professional, we are passionate about being the company that people most want to work for, and that offers software optometrists most want to buy.

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EMRlogic Systems, Inc.

The company began in 1986 as a sole proprietorship and evolved into today's EMRlogic Systems Inc. We are a team of 25 working to develop and support healthcare information management software for eyecare professionals.

EMRlogic Systems, Inc. has a long history of high-end technology leadership. The company was early to database-centric enterprise solutions; client-server systems; electronic health records; hybrid browser-based systems; adaptive workflow architectures; and now embedded Business Intelligence with closed-loop best-practices management.

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OD Professional™

Having evolved through several product phases, OD Professional had its roots over 20 years ago in the requests of several leading optometrists who wanted help to manage the "business" of their growing practices, increase their productivity, and make their offices more welcoming for patients.

OD Professional's high-end focus is important to optometry. We believe that the industry is changing with an increased focus on technology not just for automating business-as-usual but for driving higher level clinical and business success. The move towards electronic health records is the centerpiece of this new approach to healthcare technology. Technology usage is growing in ways that make a difference in the quality of care and the patient experience.

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ActionManager

What's so special about the OD Professional ActionManager? You already know that your office is busy and things occasionally are forgotten. OD Professional's ActionManager acts like a checklist for your key activities and best practices - the very things you don't want to forget. Every action has its own icon that starts Red, turns Yellow once initiated, and then Green when finished. At the end of each patient visit, a visual checklist awaits you so you can verify that everything has been completed.

ActionManager goes to work as soon as you schedule the patient's appointment. The icon appears on your Front Desk checklist just before the patient arrives. The complete patient file is attached and follows the patient through the office from station to station. When the patient leaves, the file is transferred to Back Office. If you forget, the icon remains on the Front Desk checklist as a gentle reminder. Nothing gets overlooked!

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Software Implementation

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Workload and Productivity

Changing software platforms, and especially practice management applications, is a major transition that requires significant financial and human resource investment.

A software transition will have an initial impact on productivity and should be factored in for the first two weeks after “going live”. The software implementation process goes into its most important step on the day you go live and continues from there. To facilitate the learning process, a lighter load of patients is recommended on the first two days of ‘Go-Live’. Disruptions are inherent during implementation as your staff adjusts to using new software and changes in procedures.

As with all major change, migration to OD Professional or moving from paper to a software-based office is best done in phases. Allocating sufficient time to learn, understand, and practice the new application is key. We do our best to simplify the process and work with your staff to enable a successful transition.

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Managing Change

Offices that have the best implementation experience, and thus a minimal low productivity period, have a proper internal change management plan that allocates appropriate time for staff to practice and apply newly learned skills. Staff confidence and competency in using the application go hand-in-hand and will go a long way in utilizing the full potential of the application.

Here are some suggestions that other practices have used to manage change:

- Reduced patient load during the first week of migration.
- Allocated time for staff to practice before “going live”.
- Sharing of the long term vision and plans with staff.
- Recognition provided based on staff competency in using the new application.

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Phased Implementation

Incremental change is the best kind of planned change. At OD Professional we never pretend that a software transition is no big deal. That's why we start by listening carefully to your needs and interests and help you determine what is best for you. We respect the learning curve and recognize that some staff will embrace change more

easily than others. Your recommended phases will take into account the people dimension of your practice. We will not pretend that you're simply buying a new piece of plug 'n play hardware!

The OD Professional™ phased implementation approach means you grow into your software as your business grows. If you are “paperless” today, you can transition “paperless” to OD Professional™. But for most, it means starting with Foundations then adding EHRs or Visions or both at a subsequent phase.

Client Services

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Our Client Services Motto:

Be truly passionate about ensuring client success and measure and improve client satisfaction on a regular basis by respecting and listening to client feedback.

Team

Over the coming weeks and months you will meet various members of the Client Services Implementation Team and will deal indirectly with other members in development and product management. The table below will help you understand our roles and specialties.

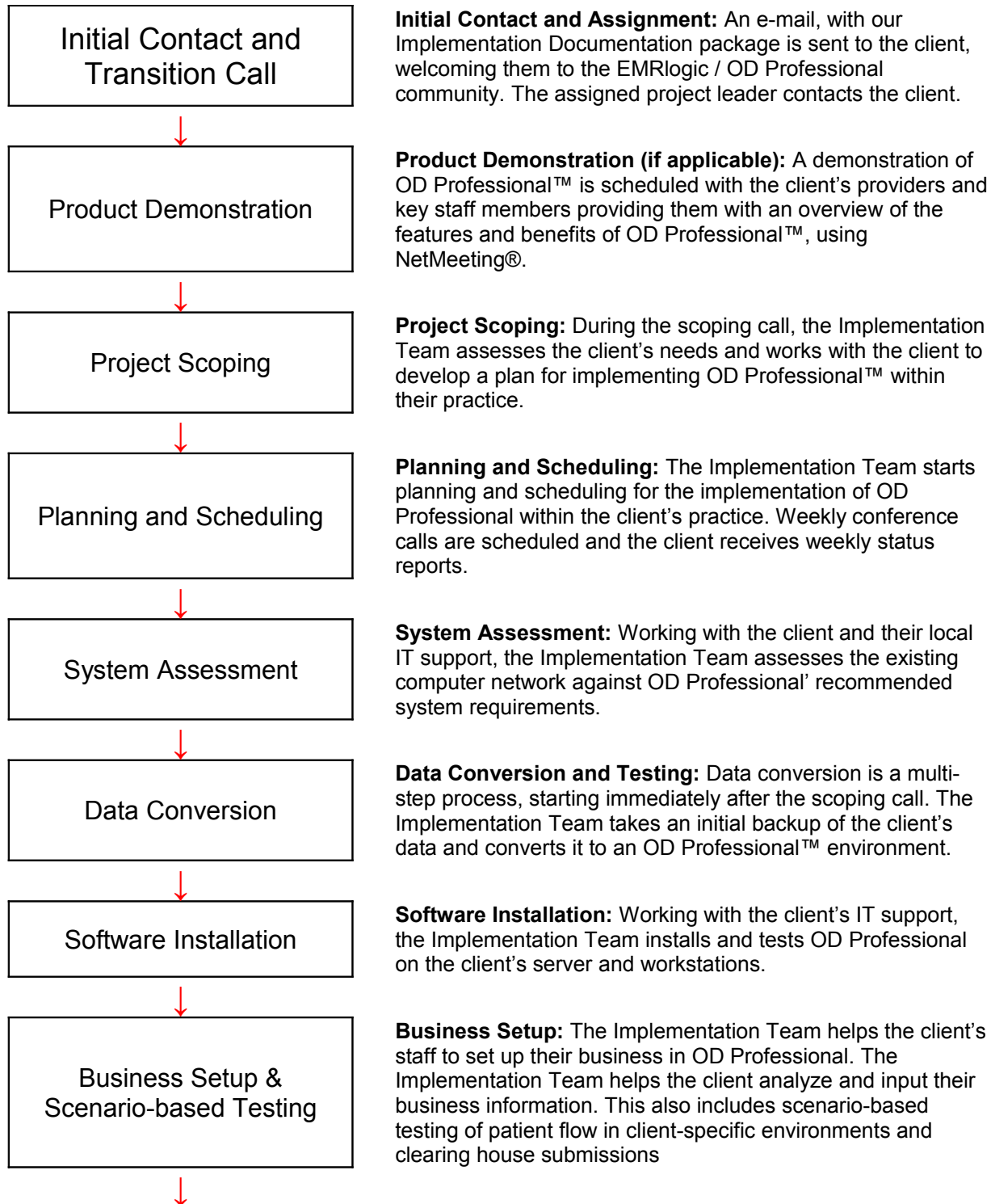
Role	Specialties
Implementation Service Specialists Project Leads	Project scoping remote training, System Configuration, PROTRACK workshop, and Go-Live coordination
Senior Solutions / Systems Developers	Advanced technical support, clearinghouse interface, report writing, database issues Data Conversions and Equipment Linking
Application Support Analyst	Pre and Post Go Live CMS 1500 (HCFA) and clearinghouse related issues and all application support issues
Client Support Specialist	Helpdesk call triage and client follow-up
Application Deployment Specialist	Application deployment, data conversion coordination, ongoing application maintenance (updates/upgrades), IT issues
Quality Assurance Analyst	Develops and establishes quality assurance standards and tests all new features before releasing them to clients
Technical Documentation Specialist	Creates, updates and maintains end-user documentation and help files

At OD Professional, we look forward to working with you to make a difference in your business. We trust that you will find both our software and our team to not only meet your needs but truly exceed your expectations.

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Implementation Master Flowchart

The flowchart below summarizes the overall process of implementing OD Professional™.



Training



Go Live

Training: The Implementation Team provides training, either remote or on-site, or both, on OD Professional™ that prepares the client's employees for Go-Live with OD Professional.

Go Live and Sign Off: With a lot of hands-on support, the client "Goes Live" with OD Professional™. The practice is encouraged to schedule a light patient load in the early days of Go-Live and to gradually increase the patient count each day.

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Implementation Overview

Regardless of how your implementation is carried out, our standard at OD Professional is one of excellence. In order to achieve that standard, our team needs to work with your team and cooperate fully together. Your partnership is essential in achieving the best possible results. Though the majority of results will become visible a week before the Go-Live date, the work begins well in advance and continues far beyond. Here are some of the critical elements in the implementation process:

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Project Scoping & Software Configuration

Configuration of your software system begins with a detailed understanding of how you run your business. We begin with an Implementation Scoping document, which is a questionnaire we ask you to complete. The assigned Project Lead then goes over the document with you and begins to customize a training and application deployment plan for your particular needs.

Clearinghouse Information

If your office is presently using a clearinghouse, please notify them as soon as possible that you will be undertaking a software transition. If you will be changing clearinghouses, please advise both old and new. Be aware that the registration process, particularly with your payers, can take up to 6 weeks. This is true whether you are changing your clearinghouse or staying with the current one.

Due to privacy and security concerns, this is not a process that OD Professional can start for you. You must initiate contact with the clearinghouse to find out about their registration process and claims processing fees. Please let them know that you are migrating to OD Professional.

The following clearinghouses have had a working relationship with us for several years:

CORTEX EDI:	Phone: 800-485-5977
Gateway EDI:	Phone: 800-556-2231
VisionWeb/EMDEON:	Phone: 877-469-3263

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Data Conversion

Data conversion is integral to the transition from one software system to another. Yet, it is a frequent source of frustration during the change process due to misalignment of expectations. Our goal is to circumvent such problems and ensure a smooth, predictable transition.

Successful data conversion consists of more than our previous experience with the said database. It depends significantly on the integrity of your data and the type of access you can provide to it.

The OD Professional team will work with you, explaining the data conversion process, what you should expect during your data conversion and what information we will need to convert your data. Your assistance in realizing that goal is much appreciated.

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Converting your Patient Data

The purpose of this section is to clarify your expectations and to advise you of the cost and relative complexity associated with more advanced aspects of data conversion. Data conversion is integral to the transition from one software system to another, yet it is a frequent source of frustration during the change process due to a misalignment of expectations. Our goal is to circumvent such problems and ensure a smooth, predictable transition. Your assistance in realizing that goal is much appreciated. Thank you in advance.

What you should know about data conversions:

1. Successful data conversion depends significantly on the integrity of your data and the type of access you can provide to it. It consists of more than our previous experience with the database used by your current software.
2. Databases typically have distinct table structures. Our ability to map a data field from the source database to a comparable field in our Caché database is critical for successful data transfer. Some structure differences mean inherently that cross-mapping is impossible.
3. Patient appointments cannot be converted from an electronic “appointment book” to a workflow-type scheduler. The two are fundamentally different technologies. Therefore, appointments must be transferred manually by your staff or ours. If your current schedule is booked far in advance and it is important to you to transfer existing appointments, please advise us early in our discussion of data conversion.
4. Procedure codes that do not conform to the CPT standard 5-digit format do not convert. In most cases, these are easily entered, even “on the fly” after

Go-Live on OD Professional. If you have unique codes and require them to be entered prior to Go-Live, please advise us thereof.

5. Inventory lists do not normally constitute a worthwhile conversion for the following reasons:
 - a. Inventory lists are dynamic by nature and are often supported by barcoding
 - b. OD Professional introduces new technology for lab catalog downloads, which is interrelated to the frames inventory.
6. Financial transactions history represents the most problematic area for data integrity and conversion and is never recommended. "Balance Forward" conversion is a safe and basic alternative that yields simple and safe results, in most cases. See the [Definitions](#) section in the Appendix of this document.
7. EHRs (clinical data from exam forms), when converted, may be viewable but not usable. That is, a screenshot of a previous exam or exam summary may be saved to the patient file, retrieved and viewed. Exam data fields cannot be mapped from the source software or database to OD Professional. This means, therefore, that the old data cannot be made usable or reportable in OD Professional. Only data that is entered manually into the OD Professional EHRs may be used in OD Professional outputs such as XML reports or summaries.

What we need to know about the data conversion you anticipate:

Please see the [Appendix section](#) of this document for a form that you should complete and send back to us.

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System Setup & Testing

Whether you are using OD Professional™ as your first optometric software or making a transition from another product, electronic practice management is not a simple endeavor. Our goal is to work alongside your local hardware technicians to ensure that your network functions properly. With new hardware and new software, technical issues will need to be resolved. After loading your software we test the network, printers, etc. and troubleshoot to resolve those new issues. Where data conversion is involved, we run the conversion using your most recent data and ensure that the new data functions properly in the new environment. System set-up is completed by our technician while your staff is being trained. Testing and resolution continue throughout the training phase.

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PROTRACK Training

At OD Professional, we consider the PROTRACK workshop to be just the beginning of an important and long-term working relationship. Helping you get off

to a good start can make the difference between a successful software transition and a rocky one. Our trainers are experienced eye care or IT trainers who understand the complexities of running your business and who care about your staff and the important role they play. Your entire staff receives 2-3 days of in-class training on the functionality of the application. In most cases, PROTRACK training follows-up on the work that was begun remotely, and is conducted in the absence of patients. Please note that training is only provided on the Foundations module on a pre-configured sample database and not your patient data.

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Business Setup

Preparing your database with business data enables your staff to work with real data while making the training sessions much more relevant.

Your custom data must be entered for:

- insurance companies
- plans you accept
- suppliers
- inventory

Where there is no data conversion, your patient demographic data must be entered. We are able to implement these important steps via screen-sharing software prior to your Go-Live.

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Go-Live

Go-Live assistance means that training continues with patients in the office. We want to get into the details with you and to be there as you deal with your everyday realities. Once again, we strongly recommend booking a lighter load for your first two Go-Live days.

To ensure a smooth transition to OD Professional™, we prepare your staff and application per our implementation policy and guidelines and require that the following steps are taken before your site can go live:

- All staff members must complete software competency quizzes and exercises.
- A Data Certification document must be signed by you, listing what data has been successfully copied over into your OD Professional™ “sandbox” database and what will be manually entered (e.g. appointments, etc.) into the Production Database after Go-Live.

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Technical Support

At OD Professional we take support very seriously. We know that you will need ongoing assistance with your software – it's the nature of cutting-edge enterprise database driven technology. And regardless of how successful your on-site visit has been, new issues will arise, training tips will be forgotten and you will need help. We will be there ready and able to intervene, and not just merely a voice on the phone.

Using NetMeeting®, our Tech Support Team is able to see your problem and, when necessary, take control of your computer to find or fix it. Our trainers and technicians will be available to you on a priority basis to get you the kind of help you need *when* you need it.

Interim upgrades are provided when needed and can be downloaded to your system by our technicians. Whether it's the addition of a new functionality such as bar-coding or a general-ledger accounting interface, electronic billing or a HIPAA-compliance requirement, you'll never need to purchase practice-management software again. We've got you covered!

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Equipment Linking

OD Professional can be linked to most optometric hardware in your pre-test and exam lanes. Understanding the two fundamental types of data, numeric data and image data, will help you understand what kind of linking you require.

DATAlink™ applies to instruments such as autolensometers, tonometers, autorefractors, etc., (those instruments for which you would typically type numeric data into a specific field in the exam form). That data may be acquired electronically through a cable, also attached to the computer stationed next to the optometric instrument. This is true instrument linking. Most manufacturers make a cable available for purchase, which is specifically designed for this purpose, using standard ports.

IMAGElink™ applies to the majority of ophthalmic instruments, including slit-lamp and retinal cameras, visual-fields, OCTs, GDX, corneal topographers, etc. These instruments often come with image-capture software and are "networked" within your office. That being the case, we will assist you to import copies into OD Professional's ImageManager (an integral part of the EHRs).

ImageManager™ In some cases, this may mean simply scanning a printout through your document scanner. Many popular visual field units, for example, output only a slip of paper printed in black and white. Other instruments may print

a color output. In all cases, ImageManager offers a means to capture your image in electronic format.

Scanning & Printing

OD Professional's Visions module helps you manage your contact lens and frames inventory. The software supports a variety of programmable barcode scanners. Barcode scanners allow for efficient frame inventory management. To complement the barcode scanner, OD Professional provides support to print custom barcode labels that help track your frame inventory not included in Frames Data.

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Next Steps

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Your next steps begin by working closely with your assigned Implementation Team.

During the next few weeks, you will be contacted by your Implementation Team leader. You'll be asked to schedule some time to complete the scoping document and, if necessary, a product demonstration.

In addition:

- We ask that you give this project top priority within your practice. The time invested now will save you considerable time and cost further down the road, as we get closer to your Go-Live date.
- We ask that you communicate to your entire staff how OD Professional will make a difference as you move forward and grow in your practice.
- We ask that you understand the concerns and fears of those around you with regard to the change in software. Please convey those to our trainers so we also may take extra care. Change can be difficult, but working closely with the entire staff, we'll try to make this a smooth transition with minimal interruption to your practice.
- We ask that you work closely with our Implementation Team and gather all information requested.
- We ask that you be open and receptive to changes in the way you do business. Change in software is an opportunity to assess the effectiveness of your current business procedures and practices, and to take your business to a "whole new dimension".
- We ask that you be open with us and ask questions when you are uncertain or unsure about something. We are committed to having a long-term business relationship with you. As with any relationship, open communication is fundamental to our success.

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Contacting Us

Mailing Address

EMRlogic Systems Inc.
3605 Gilmore Way, Suite 120,
Burnaby, BC V5G 4X5 Canada
1.866.367-2899 Corporate Toll Free
1.866.714.8287 Fax

Technical Support

Phone: 866.623.5644
Hours: 5:00am – 5:00pm (PST) M-F

Incident Tickets

Once you are up and running well on OD Professional and have made the transition from training to ongoing tech support, your primary means for submitting support requests will be via online incident tickets. You'll find a link in the OD Professional Help menu. This method ensures that we get proper documentation of your request in your words and will enable us to respond in a timely fashion.

Website

The online incident submission portal may be accessed through our new website.

- *Go to our website at www.odprofessional.com*
- *Click on Client Login Tab.*
- *Log in using:*
 - Username: odpro*
 - Password: starship*

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Appendix A

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Frequently Asked Questions

- Q1. How long is the Implementation Process?**
- Q2. Why do I have to give you access to my server?**
- Q3. Do I need to have my local IT support available during the Implementation Process?**
- Q4. Will my schedule be included during the data conversion?**
- Q5. What could delay my implementing of OD Professional™ in my practice?**
- Q6. Do I need to close my office, during my PROTRACK training session?**
- Q7. Should my doctors attend training if they won't be using OD Professional?**
- Q8. What should I expect during Go Live?**
- Q9. Do you provide refresher training?**

Q1. How long is the Implementation Process?

A. This depends on several factors including whether any upgrades are required of your existing network, data conversion, and staff training. During our Project Scoping call, we'll develop a timeframe for implementing OD Professional™ within your practice. 2-3 months from contract signature to Go-Live is normal.

Q2. Why do I have to give you access to my server?

A. Having access to your server, with full administrative rights to install and configure OD Professional on your server, allows us to resolve any issues that arise, often when the office is closed. It also allows us to provide you with regular program updates. The majority of our clients give OD Professional a unique user account with full administrative rights. All logon information is kept confidential and is only made available to our Implementation Team and Product Development.

Q3. Do I need to have my local IT support available during the Implementation Process?

A. Yes, your local IT support should be available during the Implementation process to answer any questions we might have concerning your existing network configuration. We will need your IT support to review our minimum and recommended hardware and software requirements, and to resolve any hardware or software issues that may arise.

Q4. Will my schedule be included during the data conversion?

A. No, during data conversion provider schedules are not included in data conversion. Appointments must be transferred manually by your staff or ours. There is an additional cost for this service, if required.

Q5. What could delay my implementing of OD Professional™ in my practice?

A. Although we plan your implementation of OD Professional with limited interruptions, delays in the process can occur. Most delays are the result of deficiencies in your existing network, uncovered during our initial consultation and scoping call.

Q6. Do I need to close my office, during my PROTRACK training session?

A. We recommend that your office help us to assess your training needs and make a decision on the approach that's best for your practice. A good balance is necessary between giving staff ample time to learn OD Professional and minimizing the loss of business productivity. Most offices schedule their PROTRACK training session on a Friday and Saturday, with Go-Live scheduled for the following Monday.

Q7. Should my doctors attend training if they won't be using OD Professional?

A. All providers and employees are encouraged to attend and participate in the PROTRACK training session. Our experience has shown that many providers are excited at having a powerful practice management tool in OD Professional. It provides them not only with patient demographics and scheduling, but with Business Management Reports to make informed business decisions. Providers with knowledge of Foundations find moving into EHRs and Visions a lot easier. In many cases, the doctors are the business owners, and therefore, are least likely to leave the practice. Staff turnover can have a significant negative impact on daily operations if only the staff know how to use the software.

Q8. What should I expect during Go Live?

A. If we've done our job right, you should expect a smooth transition to OD Professional™ on your Go Live date. Depending on the size of your office, OD Professional™ will provide either on-site support with one or more members of our Implementation Team or remote support with our Implementation and Tech support teams. Either way, you can be assured that you will be given professional and technical support during the first weeks of your transition to OD Professional™.

Q9. Do you provide refresher training?

A. If you have a question concerning OD Professional™, all you have to do is call our Tech Support Team at 1.866.623.5644. With each OD Professional installation you are entitled to unlimited support, as long as your account is current in your monthly agreement for support and updates. Internet training is also available on our website in the Client Login area under Video Training. For an additional charge, your office can request an on-site PROTRACK training session through our Client Services department.

Appendix B

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Definitions:

Demographics:

Patient last name, Patient first name, Patient gender, Patient birth date, Patient marital status, Patient address, Patient street, Patient city, Patient state/province, Patient zip/postal, Patient social insurance number (placed in notes) , *Patient occupation, *Patient employer, *Patient notes. (*The client must supply screen shots or print outs of the applicable software screens that have this data, so it may be searched out in the tables.)

Important Dates:

*Patient first visit, *Patient last visit, *Patient next recall (no recall history), *Patient last exam (*The client must supply screen shots or print outs of the applicable software screens that have this data, so it may be searched out in the tables. This information will be imported only if the data can be found in a timely manner.)

Balance Forward:

*Patient Balance, *Insurance Balance

*Due to the unknown factors and errors within other software (e.g. algorithms for calculating patient and insurance balances; patient insurance companies; schedules; improper data entry, etc.) it is not often easy to extract this data from files or databases. In many cases, this information, if found, is insufficient to complete an import to OD Professional.

Appendix C

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Data Conversion Form

What we need to know about the data conversion you anticipate:

1. What is the software and/or database you wish to convert? _____
2. Given the above descriptions, what elements beyond patient demographics do you want converted? Specify and data you are particularly concerned to try to convert into OD Professional:

3. Are you *able* to provide Remote Desktop access to your existing data?

4. Are you *willing* to provide Remote Desktop access to your existing data?

5. Are you or your technical resource staff able to assist in exporting your data to ASCII or Excel files?

6. Please provide contact information for resource personnel who can assist us in achieving the best possible data conversion:

7. Are you able to assign staff resources to assist with manual data entry where it is required? Please check one: internal staff resource OD Pro staff resource