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| Client Name: Happy Valley | |  |  |  |  |
| Reviewer: HPH | | | |  |  |
| **Task Deliverables** | **Duration** | **Start Date** | **Person Responsible** | **Status/Description/Sign off** | **A/R** |
| 1. Conduct contract review and Execution of Contract | 5 days | 09/01/2014 | **HPH Project manager**  **Practice project manager**  **& IT**  **Billing lead** | Review Contract and basic contract information |  |
| 1. KICK OFF CALL | 0.5 days | 09/10/2014 | **IT consultant /practice manger**  **Practice project manager**  **& IT** | HPH Implementation: PM discusses implementation options including optional EHR features and Interface integrations for labs and hospitals.  Discussion of optional services offered by HPH  Focused guidance during Implementation to achieve  Specific goals, such as meaningful use or enhanced reporting needs  The HPH will email the practice project lead the following documentation.   * Implementation Guide * Implementation Pre Assessment * Hardware checklist * Initial Data extraction date to be provided by HPH * Initial data migration/system setup spreadsheet (SSS) upload * Project lead and billing leads availability for Training date * Client provider list (for issuance of software license to providers) * E prescribing vendor Release form- registration And e-prescribing capability * HPH preferred clearing house or Non preferred clearing house |  |
| 1. Hard ware review | 0.5 days | 09/10/2014 | **HPH Project manger**  **Practice project manager**  **programmer**  **Billing lead**  **Or IT** | To ensure that the practice network and equipment are compatible with HPH software and meet the specifications for performance  Completed Hardware checklist is provided to HPH. Any Questions about the requirements, pm can arrange for a call with HPH technical Architect for assistance. |  |
| 1. Clearing house Enrollment    1. Confirm EDI and go live date      * 1. Required services   2. Initial out reach   3. Contract   4. Payer agreements   5. Configuration details   6. Payer approvals   7. Claims testing | 2 days | 09/15/2014 | **HPH-billing specialist**  **Practice billing lead or office manger** | Confirm EDI (Electronic data Interchange) go live date- PM confirms the EDI go live date   * EDI is reflective of when all payer approvals must be in place for the practice to begin using HPH for claim submission to the clearing house vendor * PM and project lead discussed the required services.   Claim submission, integrated eligibility checking, patients statements etc.,   * PM emails the clearing house to provide the contact information for the practice and required services, and expectation for the EDI goes live date. * Practice receives a contract form the vendor before enrollment can begin. * Vendor assigns an enrollment coordinator to the practice. They provide the necessary payer agreements to the practice. Practice must complete and return the agreements. * PM receives configuration details from vendor. * Practice follows up with the clearing house on a regular basis to conform that the clearing house has received the payer agreements and confirm status of payer approval. Payer approvals must be in place by EDI – go live for claims submission. * HPH will work directly with the vendor for claims testing. |  |
| 1. Place Hardware order and get dates of equipment delivery. | 5 days | 09/20/2014 | **HPH- Data migration Programmer**  **Practice project manager** | The new equipment must be ordered. As soon as the IT consultant knows the date that the equipment will be received and set up within the practice location, the consultant must provide this date to HPH project manager.  It consultant/ office manager must provide the date of expected hardware deployment to the HPH project manager. |  |
| 1. Data migration discovery call | 3 days | 09/24/2014 | **HPH cloud Engineer and Practice IT consultant** | * Data migration programmer reviews the Data migration process and answers questions the practice may have. The programmer may attempt to connect the practice’s current systems to determine if HPH will be able to perform the extraction. * Schedule initial data extraction date |  |
| 1. Billing discovery call    1. HPH billing implementation specialist will email the BDC questionnaire to the practice prior to call. | 5 days | 09/26/2014 | **Practice project manager**  **providers** | HPH billing specialist will receive BDC questionnaire back from practice. HPH Billing specialist will learn about the practice billing requirements, current internal billing process, policies and workflows. BIS will be able to identify any special configurations and requirements to ensure accurate billing in the HPH software.   * Initial installation * Billing set up training * System set up training * Clearing house claims testing |  |
| 1. Initial Data Extraction | 5 days | 09/11/2014 | **HPH billing specialist**  **Practice billing manager**  **Practice project manager** | * HPH will directly connect to the practice database and performs the data extraction. * Practice must provide connection details to HPH. A remote desktop protocol (RDP) connection to the server is required, as well as administrative access to the legacy systems database. * The HPH project manager provides templates to guide the practice and billing company with the required format. A secured FTP site is created for the data upload. The project manager provides FTP upload instructions. * The legacy software vendor provides the data in a template format to HPH. * Set up SSS training date * Data Evaluation review |  |
| 1. Network Check | 5 days | 09/05/2014 | **Practice billing manager**  **Practice project manager**  **HPH Project manger**  **HPH Data migration programmer** | * Cloud server setup * Initial installation.  1. Internet access with a static public IP address provided by the ISP. 2. Tight VNC or remote desktop protocol installed in at least one computer 3. This is done to ensure the networks bandwidth; latency and packet loss meet the requirements set by HPH in the Hardware specifications document. 4. The HPH cloud engineer performs a ping test from the client site to multiple geographically different data centers that house HPH servers. |  |
| 1. E prescribing vendor Release form- VRF 2. VRF provides HRH with specific information for each provider | 5 days | 09/05/2014 | **Practice billing manager**  **Practice project manager** | * On-site training * Go live/transition to support   To enroll in E prescription with HRH, Practice completes and returns a VRF form. Provider registration are reviewed  Registrations- SPI’s (sure scripts Provider Identifiers) may have been created for provider without his knowledge and/or may have not been disabled |  |
| 1. System setup spread sheet(SSS) training | 5 days | 09/11/2014 | **Practice project manager** | * Initial data migration system setup * Spread sheet upload.   Practices with Data migration will have the SSS prepopulated by the HPH data migration programmer. Practice may take this opportunity to clean up their data. Purpose of this training is to teach the practice how to complete the SSS. To highlight what fields are necessary and discuss special descriptions like no characters.  The practice must return this completed spreadsheet no later than a week after this training to <http://projector.com/health> (HPH website) |  |
| 1. Data Evaluation Plan Review (DEP)   Conference call | 5 days | 09/13/2014 | **Practice billing manager**  **Practice project manager** | HPH programmer may require clarification on data prior to migration  Migrating data for patients who haven’t been seen in 3 years.  Migrating old medical records numbers  Marital status codes in numerical format  Following the call the programmer will update the DEP with the information gathered during the call.  DEP is forwarded to practice for sign off and approval.  The practice must send their approval of the DEP to the HPH project manager within 24 hours of receiving the updated DEP in order to proceed with Data migration process. |  |
| 1. Clearing house contract/payer Agreement follow-up | 5 days | 09/14/2014 | **Practice project manager**  **Practice IT consultant** | * Clearing house claims testing * Practice must complete and return the clearing house service contract.   Payer agreements- the clearing house provides the practice with the necessary payer agreement. The practice must complete and return the payer agreement in a timely manner as per the instructions provided by the clearing house. |  |
| 1. Return client provider list | 5 days | 09/15/2014 | **HPH -IT** | Initial installation  The client provider list is a spreadsheet where the practice must list all the providers who require software licenses and their employment status (full time/ part time)  The practice must also include the providers NPI and DEA numbers. The practice must provide this completed list to the project manager |  |
| 1. Return System setup spreadsheet (SSS) | 5 days | 09/15/2014 | **HPH- cloud network technician** | Initial data migration/system setup spreadsheet upload  The practice must return the completed SSS no later than a week following the System setup spreadsheet training.   * HPH will review basic data integrity * Presence of special characters * Completion of all mandatory fields.   The SSS is then reviewed HPH electronic data interchange team. They perform a critical evaluation of data validations against the practice clearing house enrollment and NPPES website.  Completed SSS is due to HPH project manager no later than one week after training |  |
| 1. Hard ware deployment | 5 days | 09/16/2014 | **Practice project manager**  **HPH Project manger** | At this point hardware review an order should have been placed already.   * Install check- Hardware deployment is the date in which all hardware and networking will be in place. All servers, workstations, laptops, tablets, dedicated analog fax lines, fax servers and modems, ISP with static IP, scanners, copiers, software loaded etc., should all be in place at this time. * Cloud server setup |  |
| 1. Cloud server set up | 5 days | 09/15/2014 | **HPH installer**  **Practice IT consultant**  **Practice project manager** | Install check – the HPH installer performs the cloud server setup on the HPH servers after hours: The HPH installer prepares the HPH server to host the HPH software for the practice by setting up the database, FTP EBO terminal client and tomcat servers. |  |
| 1. SSl configuration | 4 days | 09/16/2014 | **Practice project manager**  **HPH Project manger** | Initial Installation – the HPH network technician performs the SSS configuration task. The practice public static IP addresses are noted and added to the HPH data center firewall. The practice is also assigned a unique URL that aids the communication between the HPH application from the practice side and the server. This establishes the connection between the practice location and their HPH database. |  |
| 1. Begin on site training planning | 10 days | 09/16/2014 |  | On-site training : practices are strongly encouraged to begin preparation for training ASAP  Customization on-site training guides  Document current workflows and work processes  Participating on line training sessions  Accommodating staff schedules ( staff member cannot be scheduled to work during training sessions  Determine computer proficiency of customer staff and grouping similarly proficient staff together for the same sessions.  Blocking patient scheduling on days when providers are unable to see patients  Identifying an appropriate space in the office for training  Scheduling appointments during the onsite  Training week for twice the usual time and reducing the number appointments to give providers enough time to finish charting notes.  Access webinars at <http://projector.com/health>  Obtain HPH manuals for front office , mid office, and back office  HPH will charge a fee of 750 per trainer per week. |  |
| 1. Install check | 1 day | 09/16/2014 | **HPH Project manger**  **Practice project manager** | At this point all equipment should be set up at the practice locations and the practice should have provided the HPH project manager with the completed IT checklist and Inventory document.  Ensure that All hardware devices and networking components meet HPH hardware requirements and are ready for installation. The HPH installer remotely connects to the client’s network via tight VNC or a remote desktop protocol to perform install check.  Following will be verified during Install check   * Hardware: servers, laptops, tablets, desktops, iPods, fax server modem scanners , medical devices * Networking :ISP, analog fax line, router, wireless access * Test the fax server, analog line (no VoIP lines and ,modem * Verify all outgoing ports are open if part of a hospital network * Verify that you can transfer files from other FTP servers * Test the speed between multiple locations * Load setup files |  |
| 1. On site preparation check point | 1 day | 09/17/2014 | **HPH installer**  **Practice IT consultant** | Onsite training : at this point the practice should have started the following tasks:   * participating in the online webinars at <http://projector.com/health> * Reviewing online tutorials on <http://projector.com/health> customer portal. * Customizing /creating training guide by role * Conduct gap analysis * Document current workflows * Document/develop new workflows * Scanning old charts/Integration into HPH * Blocking provider schedules to allow for training schedules * Preparing to accommodate staff schedules for training sessions. * Practice can customize a training agenda with project manager, it will be sent to the practice , along with HPH trainer in advance of training |  |
| 1. Clearing house follow up | 5 days | 09/19/2014 | **HPH data migration programmer** | * , the practice must follow up with the clearing house to confirm the status of their payer approvals. . * The clearing house will assign each practice with unique credentials. These credentials are configured on the HPH database and establish connection n to allow claim submission. * HPH project manager obtains the database configuration details from the clearing house directly. |  |
| Initial Installation | 5 days | 09/20/2014 | **HPH Project manger**  **Practice project manager** | * Initial data migration/system setup * Spreadsheet upload * Billing set up training * System set up training * Onsite training * Go live transition to support * HPH installation team installs HPH remotely to the practice network and installs the software on the server via tight VNC or RDP , approximately 3 to 4 weeks prior to onsite training * HPH installer also installs licenses and performs database-level configurations (patient education, clearing house etc) |  |
| 1. Initial Data migration /system setup spread sheet upload | 5 days | 09/25/2014 | **HPH billing Implementation Specialist**  **Practice billing manager**  **Practice project manager**  **Practice Front office Staff** | **Billing set up training**  **System set up training**  **Interface integration (optional)**  **Clearing house claims testing**  At this point the following should be completed:  DEP should already be reviewed and approved  Return SSS spreadsheet and approval.   * The HPH programmer will connect to the practice HPH database and will upload the practice data. The programmer uploads the SSS along with all patient specific and /or EMR data as detailed within the DEP. The data migration is based on the specifications obtained during DEP review. * The programmer will provide exception reports- highlighting any exceptions in the data. The exception reports will contain specific practice/patient information noted on the DEP. This will allow the practice to make edits in current software prior to the final data extraction and migration. |  |
| 1. **Final on site training preparation checkpoint** | 15 days | 09/27/2014 | **Practice billing manager**  **Practice project manager** | **Onsite training**  **The practice must confirm the following to HPH:**   * **Customization of onsite training agenda** * **Provider/staff schedules are cleared for required training sessions** * **Trainer is identified and booked for the amount of time needed for training.** * **Patient schedules are cleared on required days and times to accommodate training** * **Participation in complimentary webinars** * **Read cancellation policy for training** |  |
| 1. **Pre on site trainings** 2. Billing set up training 3. System set up training | 2 days | 09/28/2014 | **Practice project manager**    **Practice Providers** | **Onsite training**  **Go live /transition to support**  **Billing set up training- introduces** the practice to their new HPH database. Trainer demonstrates where data resides, and instructs the practice on setting up and customizing their HPH database prior to training  Some topics covered:   * Facility set up * Provider set up * Staff set up * Insurance set up * insurance groups * fee schedules   System set up training**-** The practice will be instructed on customizing their HPH database prior to training. this enables the practice to begin using HPH for scheduling in preparation for on-site training and go/live transition support  Some topics covered: Front Desk role   * Adding staff * Define providers schedule * Office hours * Provider hours * Blocking schedules * Patient demographics * Scheduling   **Admin set up**   * Visit types * Visit duration * Visit status |  |
| 1. Clearing house approval Status | 15 days | 09/28/2014 | **Practice project manager**  **HPH Project manger** | Clearing house claim testing  Go live/ transition to support  **HPH strongly recommends the practice to follow up again with their clearing house to conform the status of approvals this needs to be done prior to onsite training. If any approvals are pending, the practice must inform the PM and provide an estimate to when approvals will be in place.** |  |
| 1. Return e-prescription vendor release form (VRF) | 2 days | 09/28/2014 | **Practice project manager**  **HPH Project manger**  **HPH Data migration Programmer** | At this time all providers must complete and return VRF form. This form is necessary for enrollment to sure scripts.  **The HPH PM prided the VRF to the Practice project manager. It should be returned no later than two weeks prior to effective date.** |  |
| 1. Initial Data Migration validation and approval | 10 days | 09/28/2014 | **Practice project manager**  **HPH Data migration Programmer** | To prepare for Final data extraction and migration :  Practice must review and validate the migration by reviewing a sample of data and cross referencing between the current system and HPH.  HPH must receive any feedback approx. 1 week after initial Data migration/SSS upload and pre on site trainings  The practice must discuss any errors, inconstancies, concerns, Etc. with the HPH programmer so they can be corrected during the Final data extraction and migration  If the practice had data migrated, they should also cross reference the data migrated to improve accuracy  Review checklist   * Primary insurances * Sample of patients * Names * Demographics patient insurances guarantors * Practice information * Facilities * Appointment length and type * Custom fee schedule   *After cross-referencing, practice needs to provide written sign off approving data migration*. |  |
| 1. Final Data Extraction and Migration | 5 days | 09/29/2014 | **HPH Testing Team** | Final Data extraction occurs just prior to the onsite training and Go live to capture all data entered into the practice system since the initial extraction. This will ensure that the practice HRH database is as up to date with patient info and appointments are migrated. The project mange will determine the date the final data extraction is required   * It is mandatory that the data provided be in the exact same format as the initial data extraction. In addition the practice must provide a full cut of data, not just a differential of new data entered into the system, as certain updated details may be over looked. * Following the final migration, the programmer will provide the exception reports to HPH highlighting any exceptions in the data. If any exceptions are found, they are easily manually addressed in the HPH application itself. The HPH project manager will email the exception reports to the practice project manager. |  |
| 1. Final Data Migration Validation and Approval | 3 days | 09/28/2014 | **HPH on site Trainer**  **All practice Staff** | The practice must review and validate the migration by reviewing a sample of Data and Cross referencing between the current system and HPH to look for any inaccuracies.   * Practice must submit their feedback to the HPH Project manager approximately 1 week after initial migration. * Practice must complete the Pre on-site training before they can provide feedback. * Practice must discuss any errors, inconsistencies, concerns, etc., immediately with HPH programmer so they can be corrected during the Final migration. * If practice had EMR data migrated (alerts, discreet elements recalls, patient documents etc.) they need to obtain a sample and cross reference for accuracy * The validation and approval process includes the review checklist for the final data migration approval process for the *initial data migration and approval.* * If the practice has made corrections to the data in their legacy system based off the initial migration exception reports, the practice must also validate that the corrected data has migrated * Practice must sign off approving the final migration |  |
| 1. Clearing house Claims testing | 5 days | 09/29/2014 |  | HPH will test the ability to transmit claims during the week of on-site training to ensure that a successful connection has been established between the practice’s HPH database and the practice clearing house.  Ensure that HPH has integrated go live claims testing for top payers for all providers  If claim testing is not success ful, the practice will not be able to submit to the clearing house, which will financially affect the practice. |  |
| 1. On-site training | 5 days | 09/30/2014 | **Practice project manager**  **HPH Project manger** | * HPH Trainers are certified to provide customer training on the many * Functionalities of the comprehensive EHR solution. * Every user receives comprehensive software training based upon their role, responsibilities, and office workflow. * HPH has standardized training agendas which can be customized based on practice needs. * If the agenda is customized, the On-Site Trainer will receive this in advance from the PM.   **Training Schedule**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | |  | **Day** | **Time** | **Session** | **Recommended** | **Patient** | |  |  |  |  | **Attendees** | **Load** | |  | **Monday** | Morning | Admin Setup | All Staff | None | |  |  |  |  |  |  | |  |  | Afternoon | Front Office 1 | Front Desk Staff |  | |  | **Tuesday** | Morning | Billing 1 | Billing Staff | Minimum | |  |  |  |  |  |  | |  |  | Afternoon | EMR 1 | Nurse/MA, Provider | None | |  |  |  |  | Optional |  | |  | **Wednesday** | Morning | EMR 2 | Nurse/MA, Provider | None | |  |  |  |  |  |  | |  |  | Afternoon | EMR 3 | Providers and Super | None | |  |  |  |  | Users Only |  | |  | **Thursday** | Morning | Front Office 2 | Front Desk Staff | Minimum | |  |  |  |  |  |  | |  |  | Afternoon | Billing 2 | Billing Staff | Minimum | |  | **Friday** | Morning | Go-Live | All Staff | Minimum | |  |  |  |  |  |  | |  |  | Afternoon | Go-Live | All Staff | Minimum | |  |  |  |  |  |  | |  |
| 1. On-site training | 15 days | 09/30/2014 | **HPH Billing Implementation Specialist**  **Practice Billing Manager** | * + - * Training consists of both classroom-style instructional sessions where the trainer highlights the software functionalities, and hands-on sessions that allow the staff to apply their knowledge within their own database.       * The HPH Trainer provides basic workflow redesign and Tier 1 software support, and assists with any necessary support escalation.       * By the end of the On-Site Training week, the practice will be live on the software, and the HPH Trainer will remain available for guidance and support. |  |
| 1. Go live/ transition to support | 15 days | 09/30/2014 |  | After the On-Site Training, the practice is considered live on the HPH software.   * A transition takes place from the Implementation Team to the Support Team and from the HPH Project Manager (PM) to the HPH Strategic Account Manager (SAM). * The PM, SAM, and Practice Project Lead typically have a brief, 15-minute call to * Discuss the overall implementation, highlighting any concerns and/or outstanding items, and to identify the plan to address these items. A review of the On-Site Training and any resulting concerns are also addressed. * The SAM schedules a Support Kick-Off Call with the Practice Project Lead to introduce the practice to the support process, explain the role of the SAM, and discuss how the SAM interacts with the practice and provides ongoing assistance. |  |
| 1. Remote Post Go live Billing Trainings | 2 days | 10/01/2014 |  | * There are eight (8) standard Post Go-Live Billing Trainings that cover all billing * Functionalities within the practice management module. During On-Site Training the * Practice will submit the first claims. However, the follow-up on those claims is * Pending, since the payer will not have received and processed them yet. * The goal of these trainings is to provide education and support to the practice billing * Staffs as their initial claims make their way through the typical lifecycle. The Billing * Implementation Specialist (BIS) will review the practice’s overall workflow and provide * Suggestions streamlining and improving the process. * Trainings occur in a logical order starting in the week following On-Site Training and * ending approximately four (4) to six (6) months after Go-Live. |  |
| 1. Claims Training | 2 Days | 10/01/2014 |  | Topics Covered Topics covered in the Claims Training include, but are not limited to:   * System setup, including providers and top 10 payers * Provider mappings and custom configurations * Claim creation and batch submission * Workflow for claim creation * Filter settings for encounters and claims * IPE claim submission * Encounters and out of office visits |  |
| 1. Clearing house traing | 1 day | 10/02/2014 |  | Topics Covered Topics covered in the Claims Training include, but are not limited to:   * Clearinghouse dashboard * Clearinghouse portal * configuration * Rejections, and correcting and * Clearinghouse reports * resending claims |  |
| 1. Payments and refunds Training | 90 days | 10/03/2014 |  | Topics covered in the Training include, but are not limited to:   * Payment posting * Credits forward from legacy system * Creating a partial claim * Balance forward from legacy system * Resubmitting a claim * Processing a refund * Retractions and Insurance take-backs |  |
| 1. ERA training | 5 days | 10/04/2014 |  | Topics covered in the Training include, but are not limited to:   * Importing ERA files * e-Posting to the ERA file * Support tickets |  |
| 1. Patient Statement Traing | 5 days | 10/04/2014 |  | Topics covered in the Training include, but are not limited to:   * Patient setup * Dunning messages * Filter options * Generating and printing statements |  |
| 1. Reports Training | 2 days | 10/05/2014 |  | Topics covered in the Training include, but are not limited to:   * eBO structure * Daily Reports * Exception Reports * Month-End Financial Reports * Report Scheduling * Saving filter settings * CANNED reports |  |
| 1. Claims Work flow training | 2 days | 10/06/2014 |  | Topics covered in the Training include, but are not limited to:   * Overall workflow * Cash flow review * Clearinghouse reports * Q&A |  |
| 1. Collections Training | 2 days | 10/07/2014 |  | Topics covered in the Training include, but are not limited to:   * Transworld® systems, if applicable * Setup * Collection letter modification * Moving a patient to collections * Collection management window * Collection letter generation |  |

A/R= Accept/Reject