Admin Checklist

Library

- ❏ Facility
    - ❏ All facilities are added and linked to the correct providers
- ❏ Billing/Rendering Providers
    - ❏ All providers are added ank linked to correct facilities
    - ❏ All Calendar resources are added * this may be done from the Billing providers
- ❏ Insurance
    - ❏ Main insurances added
- ❏ Procedure / charge fee
    - ❏ All charge fee schedules are loaded
    - ❏ All allowed fee schedules are loaded - this may be done after go live
    - ❏ Reporting groups added
    - ❏ NDC - all J Codes have NDC and descriptions
    - ❏ Add global days if desired
- ❏ Calendar
    - ❏ All appointment types are added including blocks
    - ❏ All Resources are added and linked to correct types
    - ❏ Slot types are added
    - ❏ Build is completed
- ❏ Conversion
    - ❏ Test conversion is completed and a mock sign off is done
- ❏ Call reminder
    - ❏ PCG call reminders are setup and signed off on
- ❏ Merchant service (integrated credit card setup)
- ❏ Enrollments - all claims and ERA enrollments are submitted
- ❏ Statements
    - ❏ Setup dunning message
    - ❏ Sign off on proof > Client manager will send a test batch to generated a proof
- ❏ Forms > if needed are mapped and loaded