GO LIVE CHECKLIST

- ❑ All users have logged in and every desktop has the URL saved as a favorite
- ❑ I have conducted internal training using Help Center
    - ❑ Use of Reference Batch
        - ❑ How to add new and attach, balance, report, close

Who was trained and when____

- ❑ Register New Patient
    - ❑ Add insurance
        - ❑ Add secondary
        - ❑ Use of effective/expiration dates
    - ❑ Add Contact (emergency)
    - ❑ Print Ledger
    - ❑ Add/Edit Guarantor
    - ❑ Cases/Authorization (if using)

Who was trained and when____

- ❑ Check eligibility/ read results
    - ❑ My staff is aware we should always review Medicare results
    - ❑ We are aware we must *manually* update policy information if it is different

Who was trained and when____

- ❑ Calendar use (skip if you are not using)
    - ❑ Saved Calendar Display Profile
    - ❑ Make appointment
        - ❑ If using cases, when to choose
    - ❑ Check in
        - ❑ Review/confirm demographics
        - ❑ Review/confirm insurance and eligibility
        - ❑ Scan documents
    - ❑ Copay or Self Pay collection> print out receipt
    - ❑ Check out
        - ❑ Reschedule (using the 'copy/paste' feature)
    - ❑ Waitlist
    - ❑ Recurring apt
    - ❑ Cancel appointment
    - ❑ Use of block apt
    - ❑ Print appointment list
- ❑ Post Payment
    - ❑ I understand we need to post patient receipts to the PM the charge originated in
    - ❑ I have a plan for Collection of historic patient balances from old system
- ❑ Post Charge
    - ❑ Use of cases and authorizations
    - ❑ How to link appointment (if use calendar)
    - ❑ How to apply co-pays
    - ❑ How to delete a charge (reverse for deletion)

- ❑ **I have turned in EDI claims, ERA, real time eligibility enrollment**
- ❑ **I have my Charge and Allowed (if using) fee schedules loaded**
- ❑ **I have turned in my Statements enrollment**
    - ❑ I have setup my Statement defaults including dunning messages
- ❑ Posted signs or otherwise informed my patients we have new software- expect delays and possibility statements from two system
- ❑ **I have reduced my schedule the first week so as to accommodate the new software change**

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Print and Sign Name, Date

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DATE