PeakPractice Implementation Phases

Phase 1: Sale Completion Phase
1a: Sales places Post Sale Notes in GM
1b: Sales turns invoice into Accounting
1c: Accounting orders SSL and SQL and any applicable hardware

Phase 2: Pre-Implementation Phase
2a: Manager of Practice Success Team assigns regional Practice Success Manager(PSM) and EDI Administrator
2b: PSM completes introduction call to client
2c: PSM receives list of users for EDU enrollment
2d: EDU group is emailed list of users to create EDU log ins
2d: Client is emailed Practice Profile and Statement of Work(SOW)
2e: EDI Administrator will register client:
- RealMed
- Emdeon(labs and eligibility)
- SureScripts
- MyFax
- Megas(claim staker)

2f: EDI Admin notifies PSM of completed enrollment
2g: PSM will call client to ask Network Readiness Questions and schedule installation of software
2h: Support will install PeakPractice
2i: Support will complete install checklist
2j: Support will set up client on EDI server
2k: Support will return completed checklist to PSM
2l: PSM will email Practice Profile, SOW, and checlist to Implementation coordinator

Phase 3: Implementation Phase
3a: Implementation Coordinator receives Client Packet from PSM
3b: EDU logins are created and entered into Gold Mine
3c: Implementation Coordinator will link Client Packet documents to client record in GoldMine
3d: Implementation Coordinator calls client:
- Discusses training process
- Estimates and Agrees upon go -live dates with client
- Schedules initial one on one training and online training

3e: Implementation Coordinator assigns Implementation Specialist
3f: Implementation Coordinator emails PSM and EDU Administrator of go-live and training dates
3g: Implementation Coordinator forwards email from PSM with Client Packet information to assigned Implementation Specialist along with go-live and training dates
3h: Implementation Specialist has 1 hour call with client to provide EDU logs in and passwords. During call client is shown how to log into PeakPractice, EDU, and Live Meeting
IF CLIENT HAS CONVERSION:
3i: PSM schedules appointment with client for data capture for 3 business days prior to go-live date
3j: PSM emails PeakPractice Support Team, Tech Services, and TCI of Data capture and go-live dates
3k: PeakPractice Support contacts TCI to confirm extraction plan and dates

Phase 4: Training Courses
4a: Introduction to Clinician
4b: Admin and Database Set Up
4c: Calendar
4d: PM Admin
4e: Patient Responsible Sets
4f: Homework
4g: PSM contacts client to see how coming along with homework
4h: CIM Course
4i: Notes Course
4j: Intelliflow and DCR
4k: Internal Labs
4l: External Labs
4m: Orders and Protocols and Favorites
4n: Flowsheets
4o: Immunnizations
4p: Portal and Kiosks
4q: Inventory Part 1
4r: Inventory Part 2
4s: Custom Forms
4t: Rx
4u: Reporting
4v: Prenatal Module
4w: Homework
4x: PSM contacts client to see how coming along with homework

Phase 5: EDI Training
5a: EDI Trainer adds registration numbers to PeakPractice Database
5b: EDI Trainer sends test files to RealMed for claims submission
5c: EDI Trainer trains client on RealMed application

Phase 6: End User Training
6a: Messaging/Coorespondence/Faxing/Tasking
6b: Front Desk End User Course
6c: Nurse/Med Assist End User Course
6d: Provider End User Course
6e: Billing End User Couse
6f: Admin End User Course
6g: PSM calls client to confirm going to be ready for on site go live if applicable

Phase 7: Go-Live
7a: Front Desk End User
7b: Billing End User
7c: Nurse/Medical Assistant End User
7d: Provider End Usser
7e: Go Live
7f: Implementation Specialist leaves contact information with client

Phase 8: Post Go-Live Phase
8a: EDI Trainer watches claims for 1 month to confirm properly filing
8b: Implementation conducts Week One Post Go-Live Call
8c: Implementation conducts Week Two Post Go-Live Call
8d: Implementation conducts Week Three Post Go-Live Call
8e: Implementation conducts Week Four Post Go-Live Call
8f: PSM mails Letter and Certificate of Accomplishment to client