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NOTEWORTHY
medical systems, inc.

APPENDIX A

Response to

California Department of Mental Health

Information Technology Division

Electronic Health Record
(CA BH-EHR)

Achieve More.™

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APPENDIX A

NOTEWORTHY MEDICAL SYSTEMS

RR-J-01 Supplemental A:

NetPracticePM Sample Workplan and Timeline

ID		Task Name	Duration	Start	Finish	Predecessors
1		**NetPracticePM Implementation**	**60 days**	**Mon 9/8/08**	**Fri 11/28/08**	
2		**Discovery and Assessment of Requirements**	**8 days**	**Mon 9/8/08**	**Wed 9/17/08**	
3		**Sales Turnover to Implementation Team**	**1 day**	**Mon 9/8/08**	**Mon 9/8/08**	
4		Internal Meeting with NetPracticePM Implementation Team	1 day	Mon 9/8/08	Mon 9/8/08	
5		**Introduction of Client to Implementation Manager**	**1 day**	**Tue 9/9/08**	**Tue 9/9/08**	**3**
6		Schedule Implementation Meeting with Client	1 day	Tue 9/9/08	Tue 9/9/08	
7		Send Implementation Documents to Client	1 day	Tue 9/9/08	Tue 9/9/08	
8		**Implementation Meeting with Client**	**1 day**	**Wed 9/10/08**	**Wed 9/10/08**	**5**
9		Discuss Overview of Implementation Process	1 day	Wed 9/10/08	Wed 9/10/08	
10		**Discuss Required Paperwork**	**1 day**	**Wed 9/10/08**	**Wed 9/10/08**	
11		EDI/Claims	1 day	Wed 9/10/08	Wed 9/10/08	
12		Implementation Guide	1 day	Wed 9/10/08	Wed 9/10/08	
13		Electronic Statement Registration	1 day	Wed 9/10/08	Wed 9/10/08	
14		ICD-9/CPT Code Set Agreement	1 day	Wed 9/10/08	Wed 9/10/08	
15		Hardware Technical Packet	1 day	Wed 9/10/08	Wed 9/10/08	
16		Conversion Paperwortk (if applicable)	1 day	Wed 9/10/08	Wed 9/10/08	
17		**NetTool Paperwork (if applicable)**	**1 day**	**Wed 9/10/08**	**Wed 9/10/08**	
18		NetReminder	1 day	Wed 9/10/08	Wed 9/10/08	
19		NetVerify	1 day	Wed 9/10/08	Wed 9/10/08	
20		WebPractice	1 day	Wed 9/10/08	Wed 9/10/08	
21		NetCoder	1 day	Wed 9/10/08	Wed 9/10/08	
22		eDocs	1 day	Wed 9/10/08	Wed 9/10/08	
23		NetMobile	1 day	Wed 9/10/08	Wed 9/10/08	
24		NetReports	1 day	Wed 9/10/08	Wed 9/10/08	
25		**Discuss Implementation Timeline**	**1 day**	**Wed 9/10/08**	**Wed 9/10/08**	
26		Go-Live Date	1 day	Wed 9/10/08	Wed 9/10/08	
27		Initial Training Dates	1 day	Wed 9/10/08	Wed 9/10/08	
28		Schedule Business Process Analysis	1 day	Wed 9/10/08	Wed 9/10/08	
29		**Business Process Analysis**	**5 days**	**Thu 9/11/08**	**Wed 9/17/08**	**28**
30		**Implementation Manager Performs Work Flow Analysis for Current Processes**	**5 days**	**Thu 9/11/08**	**Wed 9/17/08**	
31		Registration	5 days	Thu 9/11/08	Wed 9/17/08	
32		Scheduling	5 days	Thu 9/11/08	Wed 9/17/08	
33		Check-in/out	5 days	Thu 9/11/08	Wed 9/17/08	
34		Billing	5 days	Thu 9/11/08	Wed 9/17/08	
35		Collections	5 days	Thu 9/11/08	Wed 9/17/08	

ID		Task Name	Duration	Start	Finish	Predecessors
36		Meet with Practice Leaders to Discuss Processes	5 days	Thu 9/11/08	Wed 9/17/08	
37		Gather Current Documentation	5 days	Thu 9/11/08	Wed 9/17/08	
38		Business Process Analysis (BPA) Report Formulated and Sent to Client	5 days	Thu 9/11/08	Wed 9/17/08	
39		Implementation Manager Reviews BPA with Client	5 days	Thu 9/11/08	Wed 9/17/08	
40		Implementation Manager Reviews BPA with NetPracticePM Lead Trainer	5 days	Thu 9/11/08	Wed 9/17/08	
41		**Preparation of Environments**	**10 days**	**Thu 9/11/08**	**Wed 9/24/08**	**40SS**
42		**Gather Required Documentation From Client**	**10 days**	**Thu 9/11/08**	**Wed 9/24/08**	
43		Implementation Guide	10 days	Thu 9/11/08	Wed 9/24/08	
44		**ICD-9/CPT Code Setup Agreement**	**10 days**	**Thu 9/11/08**	**Wed 9/24/08**	
45		Activate Code Sets for Client to Download	10 days	Thu 9/11/08	Wed 9/24/08	
46		**Statement of Registration**	**10 days**	**Thu 9/11/08**	**Wed 9/24/08**	
47		Forward to NetPracticePM Statement Team for Set-up	10 days	Thu 9/11/08	Wed 9/24/08	
48		**Hardware Technical Packet**	**10 days**	**Thu 9/11/08**	**Wed 9/24/08**	
49		Schedule Installation with Client IT Department	10 days	Thu 9/11/08	Wed 9/24/08	
50		Forward Technical Hardware Packet to Client IT Department	10 days	Thu 9/11/08	Wed 9/24/08	
51		Client IT Department Performs Pre-Requisite Checks on Server	10 days	Thu 9/11/08	Wed 9/24/08	
52		Installation of NetPracticePM	10 days	Thu 9/11/08	Wed 9/24/08	
53		**Conversion Paperwork (if applicable)**	**10 days**	**Thu 9/11/08**	**Wed 9/24/08**	
54		Review Data Conversion Questionnaire with Client	10 days	Thu 9/11/08	Wed 9/24/08	
55		Forward Paperwork to NetPracticePM Conversion Department	10 days	Thu 9/11/08	Wed 9/24/08	
56		NetPracticePM Conversion Department Contacts Client IT Department to Obtain Initial Data	10 days	Thu 9/11/08	Wed 9/24/08	
57		**EDI/Claim Paperwork**	**10 days**	**Thu 9/11/08**	**Wed 9/24/08**	
58		Forward Paperwork to NetPracticePM EDI Department	10 days	Thu 9/11/08	Wed 9/24/08	
59		Client is Sent Carrier Enrollment Form to Complete	10 days	Thu 9/11/08	Wed 9/24/08	
60		Enrollment Forms are Reviewed by NetPracticePM EDI Department For Accuracy	10 days	Thu 9/11/08	Wed 9/24/08	
61		Client Forwards Enrollment Forms to Each Carrier	10 days	Thu 9/11/08	Wed 9/24/08	
62		**Initial Training Agenda Created**	**10 days**	**Thu 9/11/08**	**Wed 9/24/08**	
63		Agenda Reviewed by Client	10 days	Thu 9/11/08	Wed 9/24/08	
64		Client Staff Assigned Appropriate Training Sessions	10 days	Thu 9/11/08	Wed 9/24/08	
65		**Design**	**5 days**	**Thu 9/11/08**	**Wed 9/17/08**	**41SS**
66		**Virtual Training System Set-up (In NetPracticePM Training Database)**	**5 days**	**Thu 9/11/08**	**Wed 9/17/08**	
67		Integrations	5 days	Thu 9/11/08	Wed 9/17/08	
68		Tables Set-up	5 days	Thu 9/11/08	Wed 9/17/08	
69		User Management	5 days	Thu 9/11/08	Wed 9/17/08	
70		Schedules	5 days	Thu 9/11/08	Wed 9/17/08	

ID		Task Name	Duration	Start	Finish	Predecessors
71		**Forms Wizards**	**5 days**	**Thu 9/11/08**	**Wed 9/17/08**	
72		Superbill Wizard	5 days	Thu 9/11/08	Wed 9/17/08	
73		Rich Text Editor	5 days	Thu 9/11/08	Wed 9/17/08	
74		**Initial Training**	**5 days**	**Thu 9/11/08**	**Wed 9/17/08**	
75		**Super User Training**	**5 days**	**Thu 9/11/08**	**Wed 9/17/08**	
76		Review NetPracticePM Set-up with Client	5 days	Thu 9/11/08	Wed 9/17/08	
77		Train Client Super Users Extensively on NetPracticePM	5 days	Thu 9/11/08	Wed 9/17/08	
78		**User Training**	**5 days**	**Thu 9/11/08**	**Wed 9/17/08**	
79		**High Level Overview of NetPracticePM for Client Staff**	**5 days**	**Thu 9/11/08**	**Wed 9/17/08**	
80		NetPracticePM Basics - Client Staff Trainied: Front Desk, Billing, Registration & Clinical	5 days	Thu 9/11/08	Wed 9/17/08	
81		NetPracticePM Scheduling Basics - Client Staff Trainied: Front Desk & Registration	5 days	Thu 9/11/08	Wed 9/17/08	
82		NetPracticePM Transactions -Client Staff Trainied: Billing	5 days	Thu 9/11/08	Wed 9/17/08	
83		NetPracticePM Insurance/Insurance Follow-up - Client Staff Trainied: Billing	5 days	Thu 9/11/08	Wed 9/17/08	
84		NetPracticePM Lead Trainer Reviews Training Provided with Client Practice Leaders	5 days	Thu 9/11/08	Wed 9/17/08	
85		Establish Go-Live Plan	5 days	Thu 9/11/08	Wed 9/17/08	
86		**Customization Requests**	**3 days**	**Thu 9/11/08**	**Mon 9/15/08**	
87		Scope of Project is Created and Provided to Client for Each Customizations Requested	3 days	Thu 9/11/08	Mon 9/15/08	
88		Client Reviews/Signs Off on Each Scope of Project Prior to Beginning of Customization	3 days	Thu 9/11/08	Mon 9/15/08	
89		**Development/Configuration**	**17 days**	**Thu 9/11/08**	**Fri 10/3/08**	**65SS**
90		Statement Configuration	7 days	Thu 9/11/08	Fri 9/19/08	
91		**Electronic Claims Configuration**	**1 day**	**Thu 9/11/08**	**Thu 9/11/08**	
92		Set-up BBS and Loading of all Electronic Claims Integrations	1 day	Thu 9/11/08	Thu 9/11/08	
93		**NetTool Configuration**	**17 days**	**Thu 9/11/08**	**Fri 10/3/08**	**90SS**
94		NetTool Set-up, Loaded and Configured	17 days	Thu 9/11/08	Fri 10/3/08	
95		**Conversion (if applicable)**	**17 days**	**Thu 9/11/08**	**Fri 10/3/08**	
96		Initial Data is Converted and Loaded into NetPracticePM Training Database	17 days	Thu 9/11/08	Fri 10/3/08	
97		**Customizations**	**17 days**	**Thu 9/11/08**	**Fri 10/3/08**	
98		Research and Development of Customizations	17 days	Thu 9/11/08	Fri 10/3/08	
99		Loading of Customizations into NetPracticePM	17 days	Thu 9/11/08	Fri 10/3/08	
100		**Validation**	**35 days**	**Mon 10/6/08**	**Fri 11/21/08**	**89**
101		Electronic Submission Approval	35 days	Mon 10/6/08	Fri 11/21/08	
102		**Statement Validation**	**3 days**	**Mon 10/6/08**	**Wed 10/8/08**	
103		Client Reviews and Accept Staement Sample	3 days	Mon 10/6/08	Wed 10/8/08	
104		**NetTool Validation**	**5 days**	**Mon 10/6/08**	**Fri 10/10/08**	
105		QA Performed on All Installed NetTools	5 days	Mon 10/6/08	Fri 10/10/08	

ID		Task Name	Duration	Start	Finish	Predecessors
106		**Conversion Validation (if applicable)**	**3 days**	**Mon 10/6/08**	**Wed 10/8/08**	
107		Client Validates Initial Conversion Data in NetPracticePM Training Database	3 days	Mon 10/6/08	Wed 10/8/08	
108		**Customizations Validation**	**3 days**	**Mon 10/6/08**	**Wed 10/8/08**	
109		Noteworthy Validation of Customizationss in Internal Testing Environment	3 days	Mon 10/6/08	Wed 10/8/08	
110		Client Reviews Customizations for Approval	3 days	Mon 10/6/08	Wed 10/8/08	
111		**Deployment**	**5 days**	**Mon 11/24/08**	**Fri 11/28/08**	**100**
112		**Pre-Go-Live Planning**	**5 days**	**Mon 11/24/08**	**Fri 11/28/08**	
113		Copy Training Database to NetPractice Live Database	5 days	Mon 11/24/08	Fri 11/28/08	
114		Final Conversion (if applicable) Loaded to NetPracticePM Live Database	5 days	Mon 11/24/08	Fri 11/28/08	
115		Verify All Hardware (Printers, Scanners, etc.) are Installed and Ready with Client	5 days	Mon 11/24/08	Fri 11/28/08	
116		Verity Workstation Set-up with Client	5 days	Mon 11/24/08	Fri 11/28/08	
117		**Go-Live**	**5 days**	**Mon 11/24/08**	**Fri 11/28/08**	
118		Go-Live Training	5 days	Mon 11/24/08	Fri 11/28/08	
119		On-Site Support	5 days	Mon 11/24/08	Fri 11/28/08	
120		**Complete Training Go-Live Checklist**	**5 days**	**Mon 11/24/08**	**Fri 11/28/08**	
121		NetTool Training	5 days	Mon 11/24/08	Fri 11/28/08	
122		Send Electronic Claims	5 days	Mon 11/24/08	Fri 11/28/08	
123		Verify Claims	5 days	Mon 11/24/08	Fri 11/28/08	
124		Print and Align HCFA	5 days	Mon 11/24/08	Fri 11/28/08	
125		Review Confirmation Reports	5 days	Mon 11/24/08	Fri 11/28/08	
126		Daily Balancing Reports	5 days	Mon 11/24/08	Fri 11/28/08	
127		On-Line Support Center Functions	5 days	Mon 11/24/08	Fri 11/28/08	
128		Follow-up Training	5 days	Mon 11/24/08	Fri 11/28/08	

APPENDIX A

NOTEWORTHY MEDICAL SYSTEMS

RR-J-01 Supplemental B:

NetPracticeEHRweb Sample Workplan and Timeline

ID		Task Name	Duration	Start	Finish	Predecessors
1		**NetPracticeEHRweb Implementation**	**65.5 days**	**Mon 9/8/08**	**Mon 12/8/08**	
2		**Discovery and Assessment of Requirements**	**3 days**	**Mon 9/8/08**	**Wed 9/10/08**	
3		**Sales Turnover to Implementation Team**	**1 day**	**Mon 9/8/08**	**Mon 9/8/08**	
4		Internal Meeting with NetPracticeEHRweb Implementation Team	1 day	Mon 9/8/08	Mon 9/8/08	
5		**Introduction of Client to Implementation Manager**	**1 day**	**Tue 9/9/08**	**Tue 9/9/08**	**3**
6		Schedule Implementation Meeting with Client	1 day	Tue 9/9/08	Tue 9/9/08	
7		Send Implementation Documents to Client	1 day	Tue 9/9/08	Tue 9/9/08	
8		**Implementation Meeting with Client**	**1 day**	**Wed 9/10/08**	**Wed 9/10/08**	**5**
9		Discuss Overview of Implementation Process	1 day	Wed 9/10/08	Wed 9/10/08	
10		**Discuss Implementation Timeline**	**1 day**	**Wed 9/10/08**	**Wed 9/10/08**	
11		Community Go-Live Date	1 day	Wed 9/10/08	Wed 9/10/08	
12		Initial Training Dates	1 day	Wed 9/10/08	Wed 9/10/08	
13		**New NetPracticeMedicalHub Community Set-Up**	**20 days**	**Mon 9/8/08**	**Fri 10/3/08**	
14		Community Configured	5 days	Mon 9/8/08	Fri 9/12/08	
15		**Interfaces Configured**	**20 days**	**Mon 9/8/08**	**Fri 10/3/08**	
16		Establish secure connection to hopsital	20 days	Mon 9/8/08	Fri 10/3/08	
17		**Hospital Systems**	**20 days**	**Mon 9/8/08**	**Fri 10/3/08**	
18		Configuration	20 days	Mon 9/8/08	Fri 10/3/08	
19		Testing	20 days	Mon 9/8/08	Fri 10/3/08	
20		Monitoring	20 days	Mon 9/8/08	Fri 10/3/08	
21		**Clinic Implementation**	**45.5 days**	**Mon 10/6/08**	**Mon 12/8/08**	
22		**Clinic Fully Operable**	**10.5 days**	**Mon 10/6/08**	**Mon 10/20/08**	
23		**Implementation Call with Clinic**	**1 day**	**Mon 10/6/08**	**Mon 10/6/08**	**17**
24		Discuss Overview of Implementation Process	1 day	Mon 10/6/08	Mon 10/6/08	
25		Implementation Guide	1 day	Mon 10/6/08	Mon 10/6/08	
26		**Discuss Implementation Timeline**	**1 day**	**Mon 10/6/08**	**Mon 10/6/08**	
27		Go-Live Date	1 day	Mon 10/6/08	Mon 10/6/08	
28		Initial Training Dates	1 day	Mon 10/6/08	Mon 10/6/08	
29		**Clinic Set-Up**	**5 days**	**Tue 10/7/08**	**Mon 10/13/08**	**23**
30		Clinic System Requirements Verified	1 day	Tue 10/7/08	Tue 10/7/08	
31		Providers Set-Up	5 days	Tue 10/7/08	Mon 10/13/08	
32		**Clinic Testing Checklist**	**5 days**	**Tue 10/7/08**	**Mon 10/13/08**	
33		Verify Functionality of Enterprise Tables	5 days	Tue 10/7/08	Mon 10/13/08	
34		Verify Functionality of Orphanage	5 days	Tue 10/7/08	Mon 10/13/08	

ID		Task Name	Duration	Start	Finish	Predecessors
35		Verify Functionality User Preferences	5 days	Tue 10/7/08	Mon 10/13/08	
36		Verify Demographics and Interfaces	5 days	Tue 10/7/08	Mon 10/13/08	
37		**Pre-Live Checklist**	**1 day**	**Tue 10/14/08**	**Tue 10/14/08**	**29**
38		User Setup	1 day	Tue 10/14/08	Tue 10/14/08	
39		**NetPracticeEHRweb Setup**	**1 day**	**Tue 10/14/08**	**Tue 10/14/08**	
40		Private Directories	1 day	Tue 10/14/08	Tue 10/14/08	
41		Check Pharmacies	1 day	Tue 10/14/08	Tue 10/14/08	
42		Main Drug Formulary	1 day	Tue 10/14/08	Tue 10/14/08	
43		Build Templates	1 day	Tue 10/14/08	Tue 10/14/08	
44		Build Visits and Note Type List	1 day	Tue 10/14/08	Tue 10/14/08	
45		Add Favorites or edit/delete	1 day	Tue 10/14/08	Tue 10/14/08	
46		**Clinic Go-Live**	**3.5 days**	**Wed 10/15/08**	**Mon 10/20/08**	**37**
47		**Super User Training**	**1 day**	**Wed 10/15/08**	**Wed 10/15/08**	
48		Set-Up Users	8 hrs	Wed 10/15/08	Wed 10/15/08	
49		Clinic Directories	8 hrs	Wed 10/15/08	Wed 10/15/08	
50		Clinic Favorites	8 hrs	Wed 10/15/08	Wed 10/15/08	
51		Clinic Note Types/Encounter Types	8 hrs	Wed 10/15/08	Wed 10/15/08	
52		Transcription Uploader	4 hrs	Wed 10/15/08	Wed 10/15/08	
53		**User Training**	**3.5 days**	**Wed 10/15/08**	**Mon 10/20/08**	
54		**Front Desk/Receptionist**	**3.5 days**	**Wed 10/15/08**	**Mon 10/20/08**	
55		Messaging and Demographics	3.5 days	Wed 10/15/08	Mon 10/20/08	
56		**Nursing/Clinical Support**	**3.5 days**	**Wed 10/15/08**	**Mon 10/20/08**	
57		Medications and Messaging	3.5 days	Wed 10/15/08	Mon 10/20/08	
58		**Lab Personnel**	**3.5 days**	**Wed 10/15/08**	**Mon 10/20/08**	
59		Messaging and Add Labs	3.5 days	Wed 10/15/08	Mon 10/20/08	
60		**Providers**	**3.5 days**	**Wed 10/15/08**	**Mon 10/20/08**	
61		Lab Review Sign-Off and Transcription Report Sign-Off	3.5 days	Wed 10/15/08	Mon 10/20/08	
62		Medications: Rx Refills and E-rxing	3.5 days	Wed 10/15/08	Mon 10/20/08	
63		Messaging	3.5 days	Wed 10/15/08	Mon 10/20/08	
64		Template Creation	3.5 days	Wed 10/15/08	Mon 10/20/08	
65		**Medical Records**	**3.5 days**	**Wed 10/15/08**	**Mon 10/20/08**	
66		Verify Receipt of All Outside Labs	3.5 days	Wed 10/15/08	Mon 10/20/08	
67		Verify Receipt of All Hospital Reports	3.5 days	Wed 10/15/08	Mon 10/20/08	
68		Use Send Records Routine	3.5 days	Wed 10/15/08	Mon 10/20/08	

ID		Task Name	Duration	Start	Finish	Predecessors
69		**Transcription**	**3.5 days**	**Wed 10/15/08**	**Mon 10/20/08**	
70		Upload Completed Transcription	3.5 days	Wed 10/15/08	Mon 10/20/08	
71		Upload Historical Transcription	3.5 days	Wed 10/15/08	Mon 10/20/08	
72		Verify Receipt of All Uploaded Transcriptions	3.5 days	Wed 10/15/08	Mon 10/20/08	
73		**Ongoing followups**	**35 days**	**Mon 10/20/08**	**Mon 12/8/08**	**46**
74		Daily follow-ups	15 days	Mon 10/20/08	Mon 11/10/08	
75		Twice-weekly follow-ups	20 days	Mon 11/10/08	Mon 12/8/08	74