Providing Innovative Physician Information Solutions

TRAINING AND IMPLEMENTATION GUIDE

HealthCo offers an implementation and training program to assist you in making a successful transition to your new computer system and a new way of approaching practice management in a Microsoft Windows environment.

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The following outlines HealthCo Information Systems Conversion, Training and Implementation Planning processes:

ELECTRONIC DATA CONVERSION PACKAGES[*]

HealthCo is able to convert most of the pertinent data from your existing billing program into the Practice Manager format. Conversion integrity depends on the availability of the data from your current system and the cooperation of the software vendor. You will be responsible for working with your current software vendor to furnish HealthCo with the necessary conversion data. There may be a charge from your current vendor to relinquish their formats or assist in extracting information from your database.

Converting Demographic Data and Balance Forwards or Un Paid Charges will assist you in the migration to your new system. It will be necessary to audit account balances after the conversion. There will also be additional data entry necessary to complete new data fields in Millbrook Practice Manager

HealthCo Information Systems provides two conversion package options: Basic Demographic Data Conversion with balance forward information or Basic Demographic Data Conversion with Unpaid Charges. If you have purchased a conversion package, the option you selected will be indicated on Schedule A of your Sales Agreement. Both options include the Basic Demographic Data Conversion.

The Basic Demographic Data Conversion includes the following:

- Patient Demographic Information – Account Number, Name, Address, DOB, Gender, SSN, Home and Work Phone, Insurance, Policy, Group, Responsible Party, Doctor.

- CPT Codes – CPT Code, Input Code, Modifier, Description, Fee, TOS, POS.

- DX Codes – DX Code, Input Code, Description.

- Employers –Name, Address.

- Referring Physicians – Name, Address, UPIN.

- Insurance Company – Name, Address, Phone.

- Recalls – Account, Recall Date, and Description.

- Future Appointments – Provider, Date, Time, Appointment Type, Length, Appointment Reason, Service Location.

The Basic Demographic Data Conversion with Balance Forward Information contains the following:

- Patient or Insurance balance, Provider, and Insurance Carrier.

The Basic Demographic Data Conversion with UN-Paid Charges contains the following:

- Line item – Unpaid Charges with DOS, CPT, Provider, Insurance, Balance.

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[*] Successful data conversions are dependent on the information available from your existing practice management system. There is no guarantee that specific data can be converted. HealthCo Information Systems has successfully completed many customer conversions and will work with you to provide the best conversion possible.

TRAINING AND IMPLEMENTATION PACKAGES

Option 1:

Classroom Training with On-Site Implementation Assistance:

HealthCo's Training Classes are designed to offer a "hands on" introduction to using Millbrook Practice Manager (MPM) as your practice management system. The classroom will accommodate 9 students and there is a computer for each student. A training database has been developed for use in the classroom and will provide a focused format for your staff to learn the steps necessary to set up and use Practice Manager in your clinic. You may send **up to three people** per class, if you would like to send more than three there is an additional cost per student.

After your sales agreement has completed the approval process, a HealthCo Account Executive will be assigned to your clinic. Your Account Executive will contact you to arrange a time to conduct an in-person or telephone interview with the key person or people responsible for the management of your clinic's transition to MPM. These key individuals and your HealthCo Account Executive will review your clinic's needs, set training and go live schedules and, develop a written implementation plan.

The HealthCo Information Systems' Training Classes are based on a 6-day format and are scheduled at least monthly. The classes include the following:

Patient Registration, Appointment Scheduling, Schedule Templates

- Day One (8:30am – 4:30pm)

- Agenda:
    - Introduction to and demonstration of the MPM Scheduling Component
    - Scheduling, rescheduling and canceling appointments in MPM
    - Entering and maintaining patient demographic information
    - Registering and scheduling new patients
    - Generating schedule reports, fee tickets, and patient profiles
    - Creating Practitioner schedule templates

Billing – Billing Criteria, Charge Entry, Batch Processing and Balancing Reports

- Day two (8:30am to 4:30pm)
- Agenda:
    - Overview of MPM processing methodology
    - Billing Component usage
    - Charge Entry
    - Working with Batches
    - Insurance carrier set up and table maintenance
    - ICD9 and CPT table usage and code look up
    - Insurance billing and rebilling
    - Billing Reports

Billing - Payment Entry, Batch Processing and Balancing Reports

- Day three (8:30am to 4:30pm)
- Agenda:
    - Overview of MPM processing methodology
    - MPM Billing and Payment Entry components
    - Insurance and private payment entry
    - Patient statement processing
    - Billing Reports

Accounts Receivable, Administration, and Reports

- Day four (8:30am to 4:30pm)
- Agenda
    - Using the MPM AR component
    - Customizing data fields in MPM
    - Setting up and maintaining MPM system controls
    - Billing and Financial Reports
    - Building Batch Reports

Administration, User Security, Special Scenarios, and Hands On Lab

- Day five (8:30am to 4:30pm)

- Agenda:
  - Setting up and maintaining MPM system controls
  - Adding users to MPM and defining security
  - Special scenarios and hand on lab

Advanced Accounts Receivable and Collections (60 to 90 days after go live)

- Day six (8:30am to 4:00pm)
- Agenda:
  - Practice Manager billing review
  - Using the Accounts Receivable component
  - Accounts Receivable and Collection Reports
  - Using Practice Manager for account collection activity
  - Creating and generating custom collection letters.[♥]

On-Site Assistance

- On-site assistance is provided during the "Go-Live" period to assist you in your transition to MPM. During class or on-site training sessions, staff members learned how to use MPM to perform their job functions. On-Site Assistance time is used to answer specific questions related to your practice and MPM. Daily functions and system backup procedures are also discussed. All questions and help related to auditing the conversion are included in this time.

- Length – The number of hours of on site assistance are defined on Schedule A of your sales agreement. Additional hours if required, are billed at HealthCo's standard rate.

Training Pre-Requisites
HealthCo has found that Practice Manager training is most effective when the following pre-requisites are met:

- ❑ Working knowledge of Microsoft Windows
- ❑ Working knowledge of medical billing and accounts receivable practices.

Training classes are conducted at HealthCo's Education Center in Portland, OR. Class schedules are published in advance and will require a minimum of six students per class. Training days and implementation assistance must be used within the first 90 days. Customer is responsible for travel costs if applicable.

[♥] Custom collection letters are created using Microsoft Word. A working knowledge of Microsoft Word is required for this portion of the class.

Option 2:

On-Site Training with Project Planning

- Includes up to one day of project planning time by a HealthCo Account Executive at HealthCo's office.

- Includes five days of on-site training at clinic facilities and two trips to the clinic. Additional trips to clinic and additional training hours beyond those purchased in Schedule A will be billable at HealthCo's standard rates. The format for training is similar to that of the classroom-training schedule.

- All time spent on site for training activities is tracked and included in the hours purchased as defined in your sales agreement.   It is important to plan ahead for training to minimize interruptions and distractions.

Hardware Maintenance

It is important that we take a few minutes and discuss hardware maintenance for your new practice management system. Hardware maintenance is akin to health insurance, you never know when you will need it, but are glad you had it if you have a problem. If you have a serious problem having a maintenance contract will help drive the risk out.

If you purchased your hardware and operating system from a third party you may already have a maintenance agreement with someone. If you purchased it from HealthCo you have a one-year depot warranty.

A one-year depot warranty means that if there is a problem within the first year you must pack up and ship the unit back to the hardware manufacturer. Most clinics find this acceptable with the workstations, but need an on-site service agreement on the server.

Please keep in mind that with electronic computer equipment most problems do occur within the first ninety days of use. **HealthCo recommends that you have your maintenance agreement in place prior to the arrival of the equipment.**

HealthCo has teamed up with Cascade Computer Maintenance, Inc. to provide HealthCo Customers hardware and network service / support options to meet each customer's individual needs.   CCM was established in 1980 in Salem, Oregon. CCM has grown into a regional service and support organization with 10 locations in Oregon and Washington to serve you.

HealthCo and CCM are excited about the partnership as both organizations share the common commitment of providing quality computer services and products to the Pacific Northwest.

If you would like to discuss your specific hardware service needs and receive a quotation for hardware support and service, **please contact Don Kerzel of Cascade Computer Maintenance at 800-421-7934.**

Wiring Specifications

The wiring installed at each PC location should be Level 5 Ethernet cable with a RJ45 connector jack connected and installed in a wall receptacle.

The wiring should terminate in the phone room or at a central location to a harmonica (a group of connectors) or a small patch panel supplied by the wiring installer.

Patch cords will be required for each terminal. The patch cord is used to connect the hub to the harmonica supplied by the wiring installer. The patch cord is also Level 5 with RJ45 connectors at both ends. They come in lengths of 12", 18" or 24" with 18" usually preferred.

PC line cords will be required for each PC at each location and supplied by your wiring installer. The line cord is used for connecting the PC to the wall receptacle. The line cord is also Level 5 with RJ45 Connectors at both ends. The length required is the distance from the PC to the wall connection, (usually 10' –15').

Note:
The patch cords and the PC line cords can be supplied by your wiring installer or purchased at a computer store. HealthCo can also supply the cords if notified prior to installation of equipment.

If you do not have a wiring installer please call HealthCo Information Systems and we will assist you in finding a wiring installer.

Hardware, Network and Software Minimum Requirements
for Millbrook Practice Manager Software

HealthCo Information Systems has found the following specifications are the **minimum and recommended requirements required** for a successful implementation of Millbrook software.

Server

Minimum

Pentium III 800 MHz
512 MB RAM
10 GB Free Disk Space
Backup tape drive– DDS style
CD ROM Drive
56K Modem
10/100MB NIC
Uninterruptible Power Supply

Recommended

Dual Pentium III 1+GHz
1 GB RAM
20+ GB Free Disk Space
Backup tape drive– DDS style
CD ROM Drive
External 56K Modem
100MB NIC
Uninterruptible Power Supply

Workstations

Minimum

Intel Celeron 700 MHz
128 MB RAM
200 MB available disk space
10/100MB Ethernet adapter
Windows 2000 or XP Operating System

Recommended

Pentium III 1+GHz
256 MB RAM
8GB available disk space
100MB Ethernet adapter
Windows 2000 or XP Operating System

Network

Minimum

100MB Ethernet w/ CAT 5 cabling
TCP/IP Protocol (Preferably disabling IPX/SPX to improve performance)
Remote Access Services on the server, with both NETBEUI & TCP/IP.
Each workstation should have a drive mapped to the server.

Server Software

Minimum

Windows 2000 Server with Service Pack 2 installed. SQL 2000 or Microsoft Small Business Server 2000;
Backup software – Veritas Backup Exec
pcAnywhere 9.0, Host version
Microsoft Access 2000 or XP

Additional Software Required

Microsoft Word and Microsoft Access 2000 or XP.   Word is required to generate recall and collection letters from Millbrook Practice Manager. Access 2000 is used in conjunction with HealthCo's Value Pak programs and should be installed on the server for support assistance

Internet Access

A direct connection to the Internet is required. E-mail services and a web connection to www.healthcois.com will improve HealthCo's support response to you. Appropriate firewall protection should be installed. .

Note: If customer is supplying their own workstations, printers, or server, it is the customers' responsibility to have a properly configured and fully functional network as described above prior to HealthCo commencing any on-site training or implementation assistance. HealthCo will connect to the server to verify functionality and status.

Additional Considerations

Millbrook Practice Manager comes with a standard patient profile, fee ticket and chart label formats Your trainer will review the standard formats with you. A custom format can be created by HealthCo to accommodate your needs. There is an additional charge per item if customization is necessary.

Millbrook Practice Manager comes with an electronic user manual. If you desire a printed version you may print the manual on your printer or purchase a Millbrook-Practice Manager manual from HealthCo.

Ordering Forms

Part of the Implementation Plan is a review of the forms you currently use to evaluate their adaptation to use with MPM. Plan to have your necessary forms available and ready prior to going live on the new system.

You will need to consider forms for your new patient statements (unless you use the Healthco Electronic Patient Statement Option), insurance claim forms, fee tickets, chart labels, patient recall forms & envelopes, etc.

One Write Business Printing, Inc. works closely with HealthCo customers to meet their forms needs and has put together a complementary sample forms starter kit for your convenience.

If you need forms for your new practice management system or would like assistance in developing custom forms please contact Chick Fillebrown at One Write Business Printing, Inc. at 503-235-5861 or 800-484-4050.

Acknowledgement of Training Package and Implementation Process

_____ has purchased the following training package:
Customer

❑ **Option 1:** *Classroom Training with On-Site Implementation Assistance*

Training classes are held at the HealthCo Information Systems training facility in Tualatin Oregon. Plus _____ hours of on-site implementation assistance as defined in Schedule A of the Sales Agreement and in the Training and Implementation Guide.

Or

❑ **Option 2:** *On-Site Training with Project Planning*

_____ hours of on-site training, set up and project planning as defined in Schedule A of the Sales Agreement and in the Training and Implementation Guide.

HealthCo employees will track the hours associated with implementation and training of your clinic. Training time or Go Live Assistance that exceeds the hours defined in Schedule A of your contract will be billed at HealthCo's standard rate.

I have read, understood and agree to comply with the provisions outlined in the HealthCo Training and Implementation Guide.

_____   _____
Customer   Date

Please sign and fax back to HealthCo Information Systems, attention: Training Department 503-612-1750 (fax)