practice fusion™
Free, web-based Electronic Health Records

Certified Consultant Implementation Checklist

The following items detail the scope of work that will be performed by the Consultant for the Provider:

Enroll the Provider's office for the Practice Fusion application

- [ ] CREATE A NEW EHR ACCOUNT FOR THE MEDICAL PRACTICE USING YOUR TRACKING LINK:
  Example: www.practicefusion.com/ccn/your-IT-Company-name-goes-here

Check that the Provider's hardware is adequate to support the Practice Fusion application

- [ ] TEST THE PRACTICE INTERNET CONNECTION
  Test connection speed at www.speedtest.com (minimum of 256k)
- [ ] REVIEW MINIMUM HARDWARE REQUIREMENTS
  Intel ® Celeron ® 2GHz or faster processor or equivalent
  1024x768 minimum screen resolution
  1GB of RAM
  Does the computer have Adobe Flash?
  For more detailed requirements go to our System Requirements Page
- [ ] LOG IN USING THEIR CREDENTIALS

Customize the Provider's account

- [ ] GIVE YOUR PROVIDER THE ***PRACTICE FUSION QUICKSTART GUIDE*** (a roadmap to getting started)
- [ ] IDENTIFY AND ADD USERS IN THE PRACTICE FUSION APPLICATION (MDs, nurses and office staff)
- [ ] IMPORT PATIENTS FROM PROVIDER'S BILLING OR THIRD PARTY SYSTEM
  Import into an Excel or CSV file or schedule a patient import by emailing support@practicefusion.com
- [ ] SET UP E-PRESCRIBING
  Gather the physician's name, license, practice ID, username, NPI and DEA number to fill out the E-prescribing Verification Request form, then scan and email it to support@practicefusion.com.
- [ ] ACTIVATE LABS
  Select the lab partners the Provider uses and enter their account number and Lab Rep's information. Let the Provider know they will be contacted when integration is activated.
- [ ] CREATE TEMPLATES
- [ ] SET UP BILLING
  Superbills can be created from a Chart Note in Practice Fusion and you can either provide your own billing services to your client, help them continue with their existing biller or transition them to our integrated billing partner, Kareo.
- [ ] SCAN OR UPLOAD ANY IMPORTANT DOCUMENTS DIRECTLY INTO THE EHR
- [ ] IDENTIFY REFERRAL RECIPIENTS AND ADD REFERRAL NETWORK
- [ ] CREATE FORUM SCREEN NAMES FOR YOUR CLIENTS

Train the Provider on the following features

- [ ] CHARTING
- [ ] SCHEDULING
- [ ] BILLING
- [ ] MESSAGES AND DOCUMENTS
- [ ] E-PRESCRIBING
- [ ] LABS
- [ ] CUSTOMIZING TEMPLATES/ACCOUNTS

For additional training on how to set up an account, please go to http://learn.practicefusion.com