

The Implementation Journey



Agreement Signing & Sales Handoff

After signing the agreements, the sales team will transfer your account to the implementation team. You will then be assigned an Implementation Lead, who will partner with you throughout this transitional process.



Welcome Email

You will receive an email from your Implementation Lead welcoming you to the CareStack family. From here, you will decide upon a date for your Kickoff Call, leading you into Phase One of your Implementation Journey: knocking out the details.



Obtaining access to your data

In order to begin the conversion process, we will need access to your existing practice management system and gather your data. You will receive an email with instructions and work closely with our Technical Analyst to complete this process.

Phase One: The Details



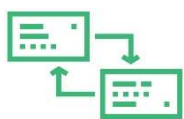
Kickoff Call

In this introductory call, you will identify your CareStack Champions, stakeholders, and Go-Live date. This opportunity will also be used to identify any pertinent goals as you discuss your journey ahead with your Implementation Lead.



Debut Environment Delivery

Following your Kick-off call, you will receive your credentials to access the Debut environment and begin your exploration. This is an ideal time for your Champions to begin their CareStack learning as the Debut environment will be setup with sample settings and sample data, allowing you to experiment with tasks, processes, and settings without worry.



Workflow Analysis

In this call, we'll deep dive into your existing operational workflows, determine any critical blockers, take your requirements into consideration, and prepare a timeline of events like training sessions and weekly meeting times.



Phase Two: Team Preparedness

CareStack University

Built right into your CareStack platform, users can start their learning as soon as the Debut environment is received. Our training curriculum gives you great flexibility for completing courses at your convenience, with a library of on-demand training videos, step-by-step lessons, and guided practice exercises available to you.



Sandbox Delivery

Once the data conversion from your legacy software is complete, a copy will be loaded into your Sandbox environment. This will give you a fresh look at how your workflows will translate into CareStack. Guided by your Implementation Lead, you will validate the integrity of the converted data to ensure there are no inaccuracies or misrepresented data.

Phase Three: The Groundwork



Interim Live Delivery

The Interim Live environment is the optimal time to begin customizing CareStack to your practice's specific needs. Completing your admin and clinical setup now will have your team prepared ahead of time for Go-Live. We'll guide you through that setup with our samples, on-demand training videos, and guided support from your Implementation Lead.



Legacy Software Sunset

If you are coming from another practice management software, the day before your Go-Live will see you performing a final run of your processes with statements, claims, and the like. Your final data will be acquired and converted into your production environment, and you will no longer be entering new data into your legacy system as it will only be used as a reference point moving forward.



Go-Live!

You're now LIVE in CareStack! Congratulations! During your first few days of going live, you will receive either onsite or remote support to ensure you have the tools necessary for success. At this point, you will be assigned to an Account Manager that will ensure your continued success in CareStack.