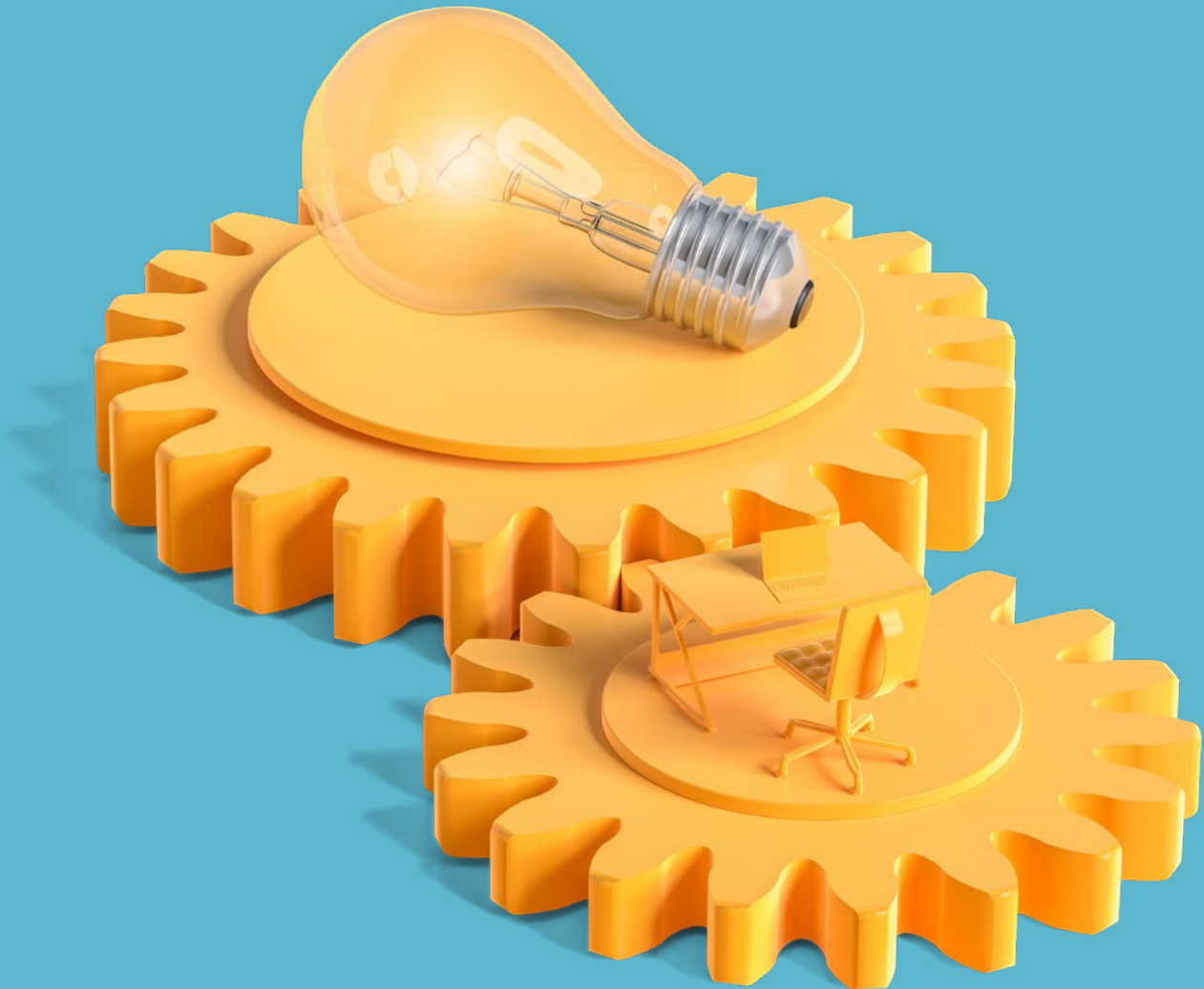athenahealth

What to expect when you're onboarding

We'll work with you and your team to gather critical information about your business that will ensure a successful go-live. Knowing what to expect during the onboarding process will help you achieve the smoothest possible transition.

You'll learn more about each step from your **onboarding project team** during your kickoff call, but in the meantime, you can familiarize yourself with this overview.

With a comprehensive, guided onboarding plan, you're well-positioned to make the most of your partnership with athenahealth.

Phase 1

You and your onboarding team will analyze your organization and assess your needs.

Phase 2

We'll guide you in personalizing your workflows and the configuration of our products to best support your goals.

Phase 3

Your clinicians, administrators, and staff will receive training to prepare them for go-live.

Phase 4

We'll continue to support your staff as they develop expertise in athenahealth products and their new workflows.

Here are some critical tasks you'll need to complete to ensure your team's success:

Set up your U.S. Bank account, enabling athenahealth to take on your revenue cycle work.

Your **banking configuration associate** will send you an email with instructions to set up your U.S. Bank account. Early establishment of the account opens the door to your revenue cycle success — so keep an eye out for this email and follow the instructions for a prompt setup.

We'll collect critical information about your business for a smooth setup and go-live.

During your first onboarding meeting, your **project lead** will walk you through the data-gathering workbook you'll fill in. You'll want to start gathering the necessary business information right away; this is the process that enables athenahealth to take work off your plate. It's important that we collect this information quickly and accurately — you can't go-live without it! **NOTE:** The different types of information are in the table below.

Data you'll need to gather for onboarding

Practice Staffing Overview	A breakdown of how many users encompass certain roles and if there's a Superuser for each
Business Name, Tax ID	The practice's legal information, including Legal Name, TIN, NPI, etc.
Provider Groups & Chart Groups	If applicable - Designating the Provider Groups to create financial walls within the Tablespace and Chart Groups to separate clinical content
Locations	Breakout of the practice's individual locations/departments
Clinical Providers	Listing out the providers who will render care at the practice, including NPI, Medical License #, and DEA # (if applicable)
Payer List	A list of the practice's top payers
Billing Questions	A series of questions based on the practice's billing setup
Staff Members	Each individual at your practice that will be using athenaOne® is considered a user; we'll need to gather information to build the practice's users
Appointment Types	A list of what appointment types the practice would need to have available to them when scheduling
Schedule	Looking at the practice's schedule for a given week; it could be broken out, practice-wide, or by provider and location
Fee Schedule	A list of CPT codes, Descriptions, and Fees that the practice will be billing
Administrative Fees	Fees that would be billed directly to the patient (e.g., No-show Fees, Medical Record Copy, Insufficient Funds)
Integration Requests	A table to be completed with the necessary info required for integration requests
Bank Deposits	Where the practice will be depositing money from U.S. Bank as well as Cash/Checks collected, for reporting purposes
Financial Benchmark Data	athenahealth collects baseline (historical) data in order to monitor your practice's performance along several key measures. It's how you hold us accountable for the results we promised

Credentialing, contracting, and enrollment information

Credentialing, contracting, and enrollment are equally critical to success in the revenue cycle for our customers. **Credentialing and contracting work is our customers' responsibility** and must be completed before enrollment can begin. Enrollment is a shared responsibility, but **athenahealth takes the lead** on establishing connections with payers to submit claims and receive payments on your behalf.

Creating a data migration strategy

Your **onboarding project lead** will work closely with you to create a strategy for migrating your patient records and other data.

Creating a training plan

According to KLAS — and our own experience — you're far more likely to be satisfied with a new vendor when you complete training prior to your go-live.* Training is a key step in the onboarding process, and necessary to get you and your team set up for success. We encourage you to take advantage of athenahealth's training resources — we have many! You can feel free to work with your **onboarding project lead** to find the resources you need.

* https://klasresearch.com/archcollaborative/report/clinician-training-2021-update/379