INTERNAL: Provider Adds and Provider Swaps

07/24/2024 6:00 pm EDT

First, let's define Provider Adds and Provider Swaps:

Provider Add- A net-new provider adds to an existing practice, normally resulting in net-new revenue.

Provider Swap- A one-for-one exchange of a provider license when a provider leaves an existing practice and a new one joins the practice, normally resulting in no new revenue.

These are assigned to the IS team as cases like upgrades and new implementations in Salesforce. The level of effort for these transactions is nearly the same. However, in some cases (no pun intended), an hour or two of training will be included for provider <u>adds</u>, which require reach-out by our team.

So there are up two components to completing a provider add or provider swap:

- 1. Account Setup (this can be done in Doctor Settings in the CRM)
- 2. Reach out to point of contact listed in the case to coordinate training (if training is noted in the case)

Account Setup

Open the CRM page using the link from the case

| Internal HUB Link https://drchrono.simplemnt.com/clients/P84T35M4SNgvVUtpit4 | | | |
|---|---|--|---|
| ✓ Sales Information | | | |
| Client Type | | State | |
| Practice | / | VA | 1 |
| Username in CRM | | Timezone | |
| wgarbia | / | Eastern | 1 |
| Account ID in CRM | | Hours of Implementation | |
| 284949 | / | 6 | 1 |
| CRM Link | | Number of Templates | |
| https://marycanderson.drchrono.com/crm/284949/ | / | 2 | 1 |
| Organizations Contact Person | | | |
| Carleen McAndrews | / | | |
| Organization's Contact Person | | Any possible landmines with DrChrono? | |
| Carleen McAndrews | / | | 1 |
| Email | | Practice Group Notes | |
| info@dontageva.com | / | Dontage is a medspa in Virginia with 1 provider and 1 aesthetician. They are currently using MyAestheticsPro | 1 |
| | | and PatientPop. Both are slowing down their very busy practice. | |
| | | They plan to use RedSpot for online scheduling, as well as RxPhoto. | |
| | | Carleen is the OM and main POC for training | |
| | | caneer is the own and main Poerfor daming. | |
| | | Let me know if you have any questions! | |
| | | Mary | |
| Preferred Phone Number | | Scheduling Notes | |
| | / | Online booking through RedSpot | / |
| | | APP1 confirmations through them | |
| Estimated Go Live Date | | Patient Portal/Check-in Notes | |
| within 50 days | / | Custom intake through portal and ipad | , |
| | | Clinical Notes | |
| | | Custom forms for aesthetics | 1 |
| | | RxPhoto for pics | |
| | | inventory for botox | |
| | | Charting done on ipad | |
| Additional Features Outside of Plan Type | | Practice Billing Notes | |
| Tasks;Flags | / | Cash based | 1 |

Once opened click on Doctor Settings



You will also want to open another provider account in that practice to "match" settings to (it is also best to check the case for which particular provider to match settings to). Other providers can be found by clicking **PG Settings** from the CRM page and choosing a provider from the menu at the top (and open **Doctor Settings** for this other provider, as well).

| dr chrono | | Enroll Telehealth Network Now 2 | 🛔 Brady Gibson 👻 | Brady Gibson (bradygibson) 🖞 |
|---|--|---------------------------------|------------------|------------------------------|
| Schedule Clinical Patients Reports Billing Account Help | * × | | Search | |
| Edit Practice | Group Info For: | + Practice Group 🛛 🖨 History | | |
| Select Practice Group | • | | | |
| Add Doctor | Wisseem Garbia Sandre Oxinas Update Member Info Create a Member | | | |
| Add Admin | Choose a doctor Update Admin Info | | | |
| Search Settings | | | | |
| Primary Practice | Group Settings | | | |
| Organization name | Name of organization. | | | |
| Organization name recording | Choose File No file chosen Custom recording of Organization Name to be used in reminder phone calls. | | | |
| Share custom clinical templates | 2 Do different providers in this practice group share the same custom templates? | | | |
| Share clinical templates | Do different providers in this practice group share the same workflow templates? | | | |
| Doctor sharing clinical templates | V | | | |
| Share consent forms | Enable to allow sharing of consent forms between doctors | | | |

Now you should have two browser tabs open: one for the new provider and one for an existing provider in the same practice.

You will now apply the settings from the existing provider's account to this new provider's account. It is recommended to have one tab open on each screen or set up a split screen. Be mindful of some user-specific settings that should <u>not</u> be matched, such as:

- Phonetic Name
- iPad Unlock Passcode
- Customized Email Signature (unless it is just the practice name listed)
- Default Billing Provider (when in doubt, reach out to the practice to confirm!)
- Social Security Number

- Rendering Provider NPI Number (most of the time this is listed in the case but if not, the NPPES Registry is a great resource for locating NPI numbers)
- Any personal info under the "eRx" section

When done, be sure to click Update Doctor Info at the bottom to save your changes.

Enabling Speech-to-Text (if not provided by client via onboarding hub)

This feature only needs to be enabled if the provider you are matching from has it. If the existing provider has this, it will look like this in Doctor Settings for that provider:

| M*Modal Speech-To-Text | | |
|------------------------|--|---|
| Mmodal enable user | | |
| Mmodal enabled at | 2019-05-13 00:00:00 | |
| Mmodal enabled by | David | |
| Mmodal disabled at | | |
| Mmodal disabled by | | |
| Mmodal author id | 2.16.840.1.113883.3.21.11800.3 | MModal author id. |
| Mmodal language | American English 🗸 | |
| Mmodal trial used | | |
| Mmodal trial start | | Date that speech-to-text feature trial started. |
| Mmodal trial end | | Date that speech-to-text feature trial ended. |
| Mmodal internal notes | 2.16.840.1.113883.3.21.11800 .339821.338141.24247218/A~ Author(Emp created by Mark on 04/28/2017) 2.16.840.1.113883.3.21.11800 | Private notes for internal use: Details related to this Doctor's use of speech-to-text. |
| | .339821.338141.24247218/A~ Author(Emp disabled by Mark on 06/29/2017) 2.16.840.1.113883.3.21.11800 | |

DrChrono uses M*Modal as its speech-to-text feature for the iPad and iPhone EHR apps. This feature is only available for Hippocrates and above.

Support can handle setting this up but you must send a support ticket to the Tasks Support team. In Zendesk, you can use a "macro" to pull in a ticket template for this task type. The macro is called "Enable Speech-to-text" and the ticket looks like this:

| Ticket #652252: I NEE × | Is Enable Speech-to | . • × + Add | a 🗞 🖾 🔠 🖉 |
|------------------------------------|---------------------|--|------------------------------|
| #03/830 | | | |
| OPEN TICKET | | | Apps |
| ± = | • | | |
| Requester | | Subject | |
| search name or contact info | | Enable Speech-to-Text | |
| A | | Description | |
| Assignce | take it | Good day, | |
| - | | Please enable S2T for the following CRM: | |
| CCs | cc me | Thank you! | |
| Chiranth Harikrishnan | | | |
| Sharing | | | |
| - | - | | |
| | | | |
| Tags | | T 🗓 Q | 25 |
| | | | |
| Enterprise Ticket* | | | |
| No | ~ | | |
| drchrono username | | | |
| | | | |
| Telephone Number | | | |
| | | | |
| Device / Product / Service* | | | |
| EHR Clinical/Charting | ~ | | |
| Customer provided Support Category | y 🖗 Appl | y macro 🗸 | Close tab 🗸 Submit as Open 🗸 |

Just add in the CRM link and add yourself as the requestor and you are all set! It typically takes 1-2 business days for support to process this request.

Training Reach-out

We have streamlined this process with a Groove template called "Provider Add w/ Charting Training" that you can use to quickly craft an email to the point of contact listed on the case to schedule training. Be sure to use a <u>single-use</u> Calendly link so the customer cannot bookmark your link to use again.

| Apps M 🔟 🛆 🗭 🔤 🍋 🔲 SFDC Cases 🚺 DrChrono EHR 🚮 Zei | desk 👹 🔤 Box 💎 JIKA ズ Confluence 🛐 FullStory 🚮 Status 🚺 Playlists 🙆 |) IS Meeting Minutes 🛬 STEM 🛃 Candidate Pipelin 🛟 Waystar 🛅 | Support Articles Diffice Tools |
|--|--|--|--|
| dr chrono | Q, Search | | C V New ad hoc mee |
| Sales Home Leads V Accounts V Contacts V Opportunities V Cases | Reports Dashboards Marketing Promo Codes Health Checks Delighted Responses | Partnership Requests Feature Requests Campaigns Partner Opport | Event Types 🔺 Starred |
| Case Dontage-Prometheus with Scheduling License | | + Follow Edit Change Owner | Clon Brady Gibson |
| nternal HUB Link https://drchrono.simplemnt.com/clients/P84T35M4SNgvVUtpit4 | | Arun Kumar sent an email to Carleen McAndrews | |
| Sales Information | | Email: << Re: KO call follow up email Arun Kumar sent an email to Carleen McAndrews | 15 mins - ONE-ON-ONE Edit |
| Client Type Practice | State VA | > Email: << Re: KO call follow up email | Add an internal note |
| Jsername in CRM wearbia | Timezone Eastern | Arun Kumar sent an email to Carleen McAndrews | Copy link Copy single-use link Add times to em |
| Account ID in CRM | Hours of Implementation | Arun Kumar sent an email to Carleen McAndrews | A sum assume as 1 |
| IRM Link There / Jeannes and estimate and (see / 29/060 / | Number of Templates | Email: >> Re: KO call follow up email Arun Kumar sent an email to Carleen McAndrews | 45 Minute Meeting |
| Ingenizations Contact Person | | Waseem Garbia - Dontage Medical Aesthetics ar | Add on internal note |
| arleen MCAndrews Organization's Contact Person | Any possible landmines with DrChrono? | Arun Kumar had an event with Carleen McAndrews | Copy link Copy single-use link Add times to em |
| Carleen McAndrews | Bractice Group Notes | Email: >> KO call follow up email Arun Kumar sent an email to Carleen McAndrews | 2 20 MINS - ONE-ON-ONE |
| info@dontageva.com | Dontage is a medspa in Virginia with 1 provider and 1 aesthetician. They are currently using N and PatientPop. Both are slowing down their very busy practice. | MyAestheticsPro > Waseem Garbia - Dontage Medical Aesthetics an Anun Kumar had an event with Carleen MAndrees | 30 Minute Meeting Add on Internol note |
| | They plan to use RedSpot for online scheduling, as well as RxPhoto. | Email: << Accepted: Waseem Garbia - Dontage M | Acdic Copy link Copy single-use link Add times to em |
| | Carleen is the OM and main POC for training. | Arun Kumar sent an email to Carleen McAndrews | |
| | Let me know if you have any questions! | Email: << Declined: Waseem Garbia - Dontage N Arun Kumar sent an email to Carleen McAndrews | tedic ☆ 1HR - ONE-ON-ONE Edit : 60 Minute Meeting |
| Professed Dhone Number | -Mary Scherkeine Notes | Email: << Dontage Medical Aesthetics - Kick-off | Add an internal note |
| | Online booking through RedSpot APPT confirmations through them | Arun Kumar sent an email to Carteen McAndrews | Copy link Copy single-use link Add times to em |
| stimated Go Live Date | Patient Portal/Check-in Notes | Arun Kumar sent an email to Carleen McAndrews | |
| Vithin 30 days | Custom intake through portal and ipad | Email: >> Welcome Email | CrChrono Training |
| | Custom forms for aesthetics Botox/laser etc RuPhoto for pics | Arun Kumar sent an email to <u>Carteen McAndrews</u> No more past act | tivitie 1HR - ROUND ROBIN Edit |
| | inventory for botox Charting done on ipad | | And an internal nate |
| dditional Features Outside of Plan Type | Practice Billing Notes | Account Datails | and an memory role |
| asks;riags | Currently using WorldPay | Account betails | Copy link Copy single-use link Add times to em |

Once the account is set up and training is completed (if included), you can close out the case in Salesforce! You did it!!