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 adds, which require reach-out by our team.

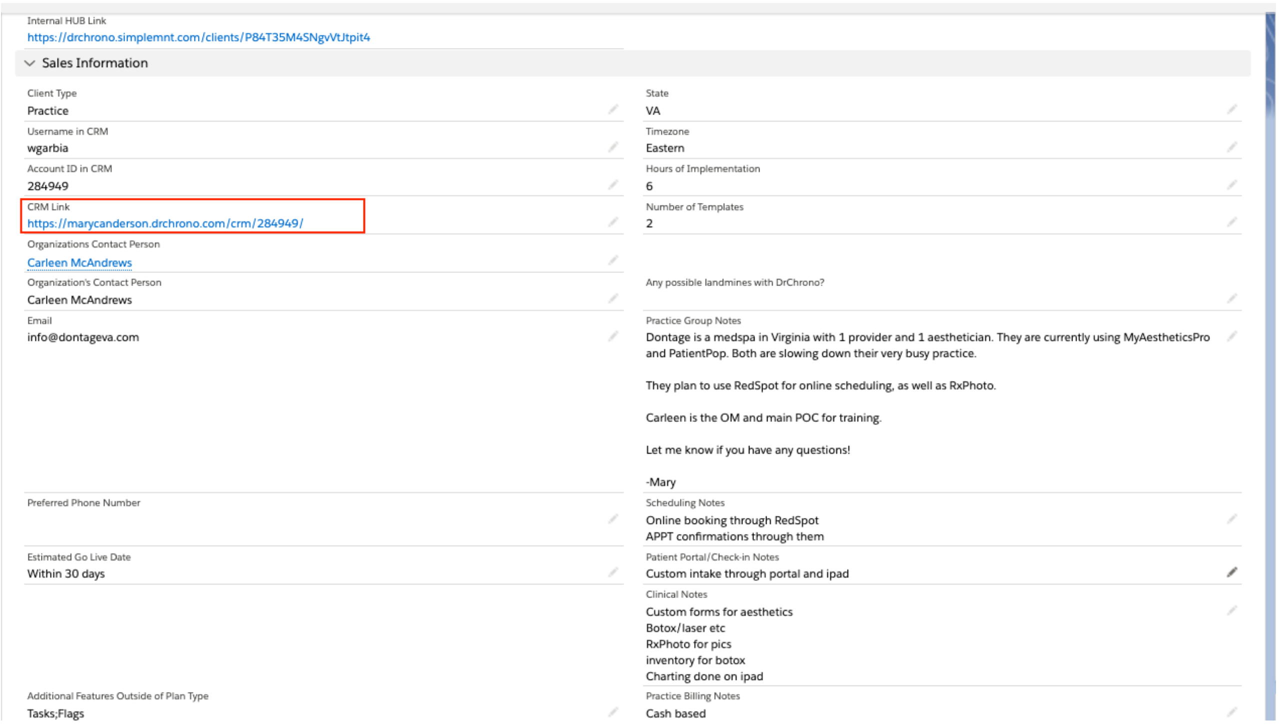
So there are up two components to completing a provider add or provider swap:

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/P84T35M4SNgvVtJtpit4

Sales Information

Client Type
Practice

State
VA

Username in CRM
wgarbia

Timezone
Eastern

Account ID in CRM
284949

Hours of Implementation
6

CRM Link
https://marycanderson.drchrono.com/crm/284949/

Number of Templates
2

Organizations Contact Person
Carleen McAndrews

Organization's Contact Person
Carleen McAndrews

Any possible landmines with DrChrono?

Email
info@dontageva.com

Practice Group Notes
Dontage is a medspa in Virginia with 1 provider and 1 aesthetician. They are currently using MyAestheticsPro 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.

Let me know if you have any questions!

-Mary

Preferred Phone Number

Scheduling Notes
Online booking through RedSpot
APPT confirmations through them

Estimated Go Live Date
Within 30 days

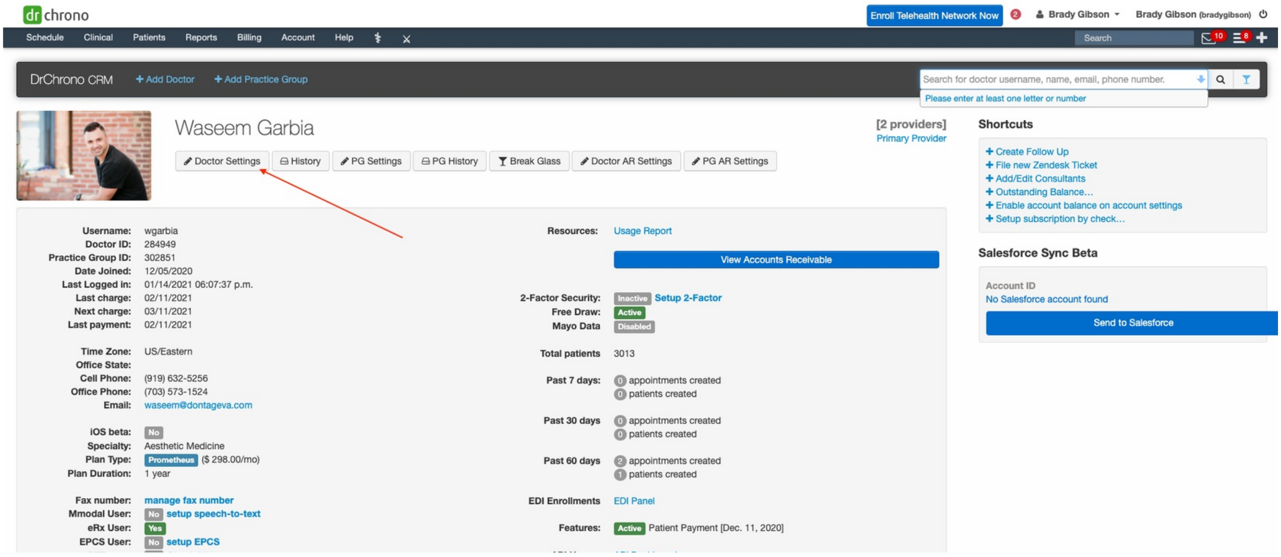
Patient Portal/Check-in Notes
Custom intake through portal and ipad

Clinical Notes
Custom forms for aesthetics
Botox/laser etc
RxPhoto for pics
inventory for botox
Charting done on ipad

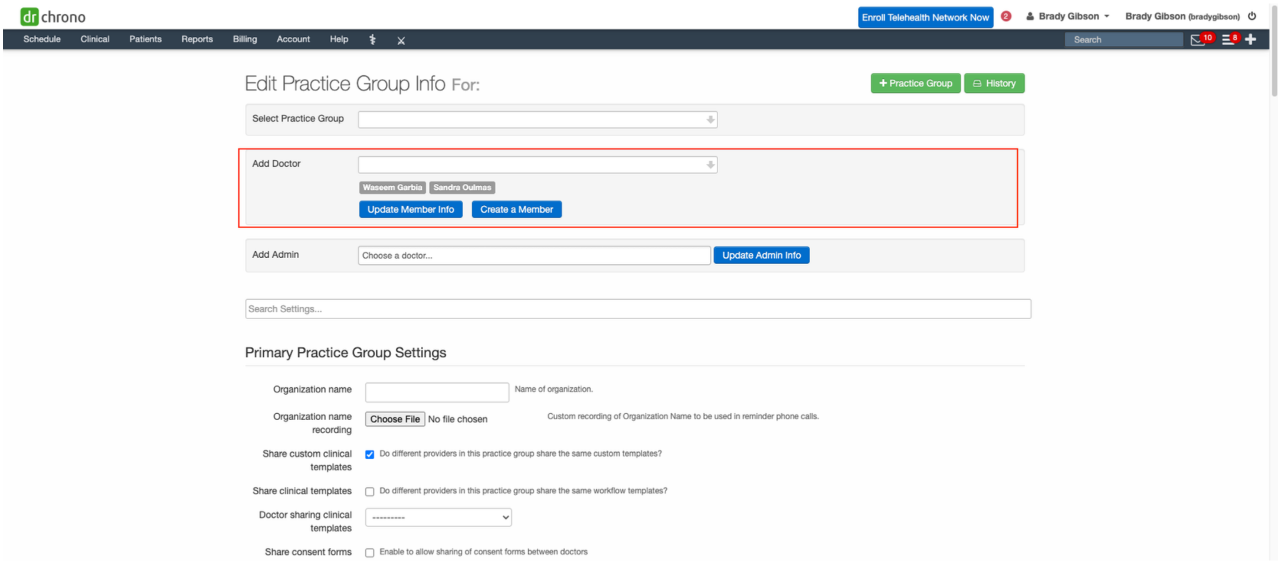
Additional Features Outside of Plan Type
Tasks;Flags

Practice Billing Notes
Cash based

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).



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 not 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

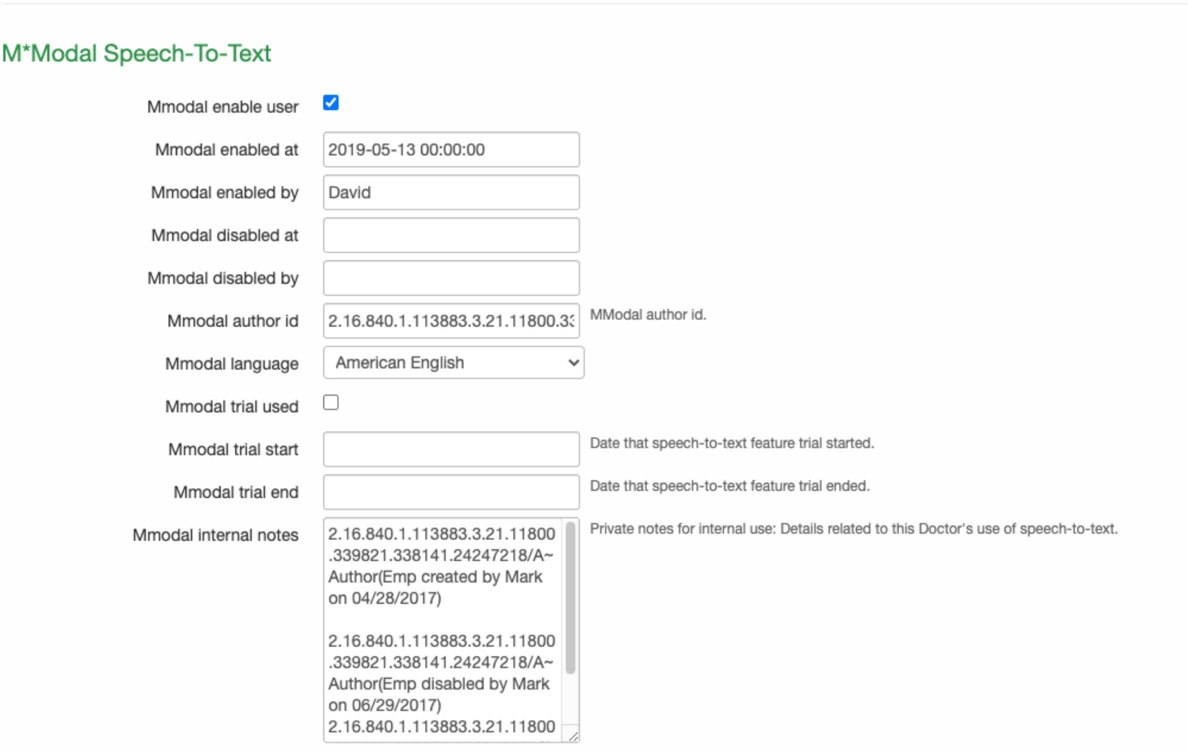
- Rendering Provider NPI Number (most of the time this is listed in the case but if not, the NPPES Registry is a great resource for locating NPI numbers)

- Any personal info under the "eRx" section

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

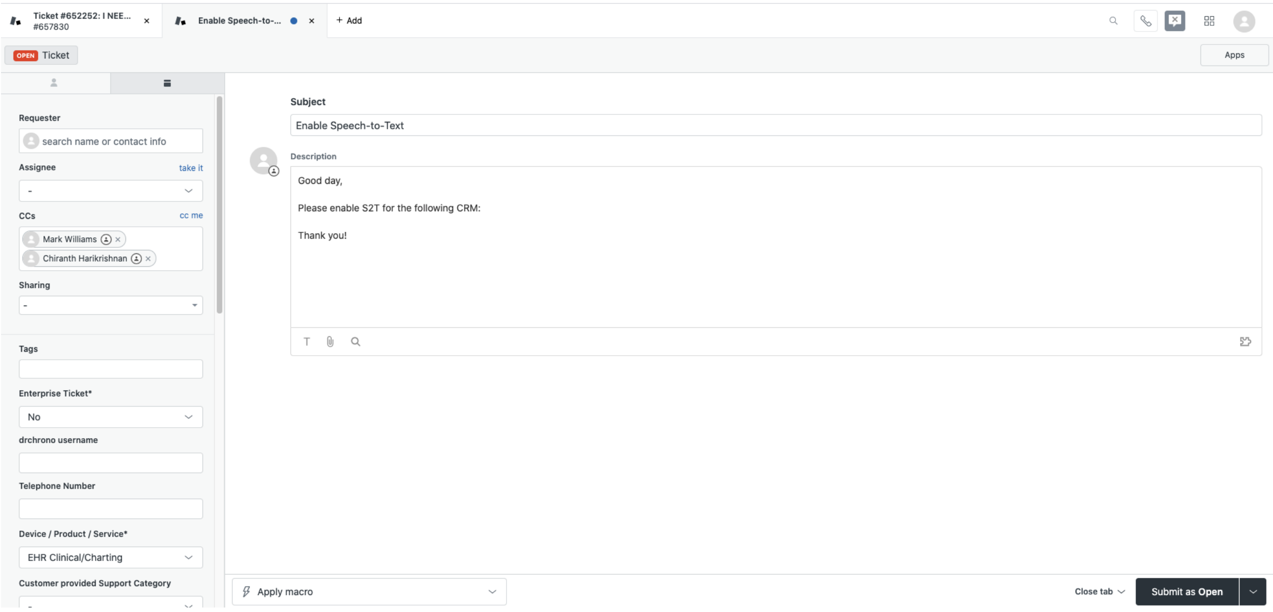
Enabling Speech-to-Text (if not provided by client via onboarding hub)

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:



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.

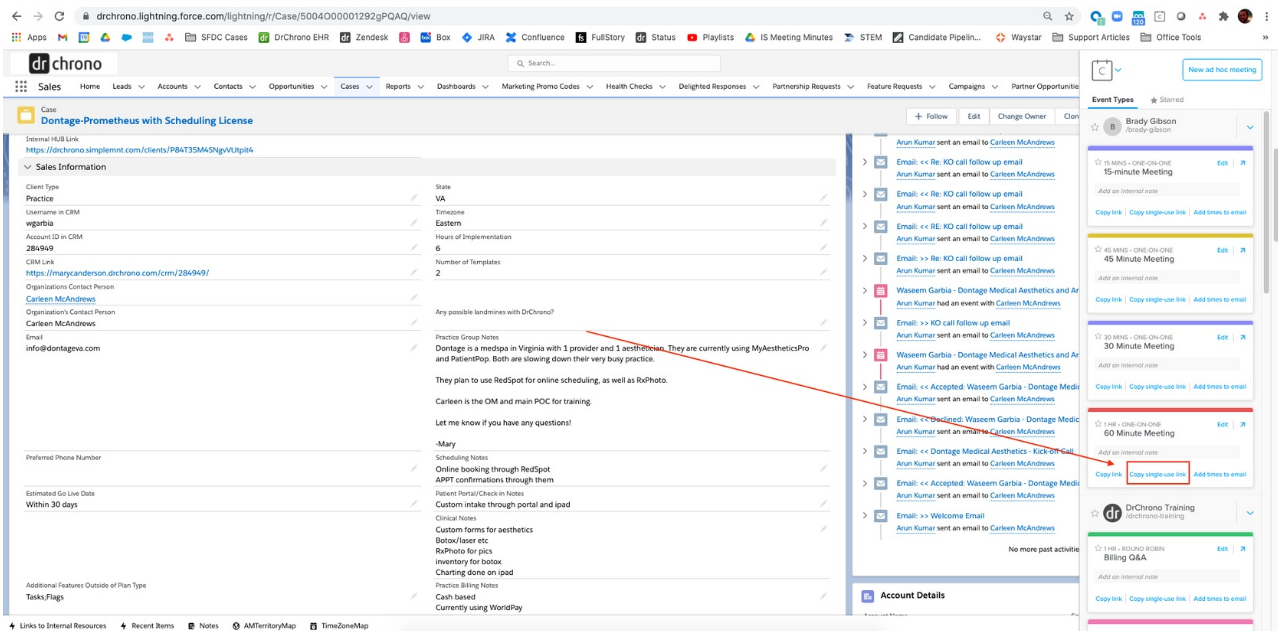
Support can handle setting this up but you must send a support ticket to the Tasks Support team. In Zendesk, you can use a "macro" to pull in a ticket template for this task type. The macro is called "Enable Speech-to-text" and the ticket looks like this:



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.



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