



8513 NE Hazel Dell Ave. Suite 102
Vancouver, WA 98665-8068

800.594.8043

Email: moreinfo@onpointmedicalsolutions.com



Onpoint's Revenue Cycle Management
Onboarding Roadmap
60 Days to Success!

Check List

- 1Welcome & Kick-off
- ☐ Contract Service Agreement (CSA) signed
 - ☐ Welcome email with a link to the Implementation Packet
 - ☐ The Implementation packet must be completed and returned within 7 days in order to meet the GoLive date.
 - ☐ Practice to ensure credentialing & contracting is complete
 - ☐ The credentialing process can take 1 - 6 months depending on carrier
 - ☐ Onpoint will process all EDI and EFT agreements
 - ☐ Onpoint will file the W-9's will all carriers

- 2Onboarding
- ☐ Set-up digital filing cabinet
 - ☐ Establish office key & verify system configuration
 - ☐ Import provider fee schedule
 - ☐ Establish Merchant & Bank Deposit Service accounts
 - ☐ Confirm EHR interface and testing, as necessary
 - ☐ Remote training on PM software for all providers and staff.

- 3Post GoLive
- ☐ Monitor practice workflow and make suggestions for change in an effort to take full advantage of the PM software
 - ☐ Participate in the 90-day post GoLive meetings and provide additional training, as needed
 - ☐ Best Practice Reporting
 - ☐ Month End Reporting

"Yes, change is scary but staying in your current situation is just putting your practice at further risk. Onpoint Medical Solutions handled the transition flawlessly and with Onpoint my collections have increased 15%, Onpoint is the right solution".

– Neurology, Hawaii

Onboarding Timeline

PROVIDER	PROVIDER	PROVIDER	ONPOINT	ONPOINT	ONPOINT	ONPOINT	PROVIDER	ONPOINT	ONPOINT
CSA Execution	Old Biller Separation	Implementation Packet	Carrier Notification	Onboarding Phase 1	Onboarding Phase 2	Training	Old System Wind Down	GoLive	Post Go Live
		Day 1-7		Day 8-30	Day 30-60	Day 45-60	Day 45-60	Day 60	Day 61-180
The onboarding process, does not start until the CSA is fully executed. Onpoint can not act on your behalf prior to receiving the signed CSA.	The current biller should be notified of the last charge entry date. Ideally, it will be one month prior to GoLive date but no less than 2 weeks. Current biller will continue to collect and post on all outstanding AR until such time that all accounts have been resolved or until client is satisfied. Current biller will utilize their current PM to complete and report on all AR prior to termination date	This must be complete and accurate and returned ASAP but no later than within 7 days of receipt in order to meet the GoLive date. We can not proceed without this information. This information is utilized to not only set up your account but is used when interacting with the carriers on your behalf. If it is not accurate then the carriers will return all documents sent to them thereby delaying GoLive and negatively impacting your cash flow.	Based on the insurance carrier list, provided in the implementation packet Onpoint will notify all participating carriers of client's new billing/remit to address change (W-9s), process carrier EDI and EFT agreements.	During Phase I the digital filing cabinet will be set-up; the provider and designated staff will be trained on how to utilize the filing cabinet; Onpoint will establish the PM office key; Onpoint will set-up and verify system configuration; Onpoint will create and import the provider fee schedule.	Onpoint to establish Merchant and Bank Deposit Service accounts and will coordinate with the EHR for onboarding and set-up.	Onpoint will train provider(s) and staff. Remote training will be set up at the convenience of the practice.	Provider is to stop entering charges in the old system. All charges will be entered in the Onpoint AdvancedMD practice management software and on GoLive will be released. Although this seems like it will hurt cash flow it actually reduces carrier confusion and is the best way to ensure that the carrier remits correctly.	Onpoint will bill, collect and post for all services rendered from this date going forward.	Onpoint believes that is important to have ongoing interaction immediately after GoLive. To this end, we schedule Post GoLive training so that there is a dedicated time to ask questions, review processes and systems. These sessions have proven to be a stabilizing factor and an invaluable resource for everyone.