Interactant

Systems Review and Implementation

Implementation of **INTERACTANT** normally begins at commencement of contract signing. The first step in the process begins with a systems review which starts with HCS forwarding documentation for the client to review. This, in combination with any previous demonstrations, allows the client to be well informed with regard to the functionality available within **INTERACTANT** before the systems review meetings take place.

The systems review is a learning tool for both the client and HCS regarding any unique requirements. During the systems review, the client learns in detail how **INTERACTANT** performs daily, weekly, monthly, and yearly tasks. HCS reviews details within each application including screens, reports, system flow, job flow, and data elements collected. An HCS Project Manager and Application Specialist travel to the client's facility, generally spending between one and two weeks on-site, meeting with appropriate client staff members reviewing the entire suite of applications that the client is licensing from HCS.

HCS will use the knowledge gained about client policies and procedures gathered through the demonstration(s) and the kick-off conference calls to better direct implementation strategy. HCS continues learning about the organization by working closely with key decision-making people with the goal of understanding the client's operations, and to assist in decisions regarding possible modification to the system and/or client internal operations. It is HCS's responsibility to inform the client where and how current functionality within **INTERACTANT** may fit their needs, or suggest appropriate changes to operations to avoid incurring additional modification expense. It is our goal to partner with the client to find the most appropriate and cost-effective method for implementing **INTERACTANT**.

Two key factors resulting from these meetings include the amount of implementation effort that will be required to install the system, and any modification that will be needed. HCS may have estimated implementation costs without modifications as part of an original proposal based upon historical implementation effort. Unless HCS discovers substantial differences between what was originally known about the client and its operations, the original estimates for implementation should remain in effect after the systems review.

Below is a listing of standard implementation items as well as items that are considered modifications. Please keep in mind that a normal implementation includes effort on both HCS and the client's part. The more contact and cooperation between parties, the smoother the implementation will be. Both sides must be open to suggestions and be willing to work hard to reduce time and, in effect, costs for both implementation and modifications.

Client Responsibilities

- Assign knowledgeable key personnel authorized to make critical decisions for the entire organization who will be available for the entire implementation project.
- Gather critical reports, forms, government regulations, and policies and procedures that affect the client's business and can have an influence on the implementation of **INTERACTANT**. No one knows the client's business better than the client.

- Review HCS documentation presented prior to systems review meetings.
- Gather background information and specifications for any data conversions or interfaces.
- Review and approve System Design document which is developed after completion of systems review meetings.
- Make available all necessary information for optional data conversion.
- Test applications prior to go live.
- Select client train-the-trainer representatives to work with HCS in the training environment prior to go live.
- Examine system to verify compliance and that all changes requested are included and working in the delivered system.
- Sign-off on compliance and systems review changes. With approval, client can go live.

HCS Responsibilities

- Systems Review
  - Prepare initial documentation and send to client
  - Organize kick-off conference calls
  - Plan on-site meetings:
    - Review documentation (screen-by-screen, report-by-report, option-by-option) and note all required modifications
    - Data base review
    - Regulatory review
    - Conversion discussions
    - Interface discussions
    - Special forms
    - Special reporting criteria
  - Review systems review meetings and System Design document write-up:
    - List finalized estimate for standard implementation time
    - List requested client modification with estimates
    - Submit document to client for review and approval
  - Upon client's approval of the System Design document, system preparation commences (creating client's individual copy of all applications):
    - Creating libraries
    - Creating each file within **INTERACTANT** data base
    - Compiling client display screens, reports, and program
    - Implement face sheet form for up to three patient types with minor form changes
    - Implement standard patient statement, UB04, 1500 forms
    - Implement standard materials management purchase order form
    - Implement standard payroll paycheck and direct deposit vouchers
    - Implement system supported payroll deduction types and frequencies
    - W2 form and 1099 form setup
    - Implement client payroll earnings categories
    - Implement general ledger autofeed journal entities from each applicable application selected
    - Implement standard accounts payable check format
    - Review physical therapy notes, assessments, and charges
    - Review occupational therapy notes, assessments, and charges
    - Review speech therapy notes, assessments, and charges

- Review respiratory notes, assessments, and charges
- Review nutritional therapy notes, assessments, and charges
- Review social services notes and assessments
- Remove (do not compile and remove options) unwanted reports and functions
- Implement regulatory MDS modifications
- Setup system security on selected options
- Work with client on code table maintenance
- Work with client on code master file maintenance (procedures, ICD9, CPT, insurances, etc.)
- Work with client on initializing system variables including account number, medical record number, purchase order numbers, vendor numbers, etc.
- Verify system compliance and accuracy through programmer testing
- Build web application
- Configure PDF writers
- Create user ID and profiles
- Configure security and user profiles/roles
- Finalize client's version of documentation
- On-site client training
- Assistance with client testing
- Hardware configuration assistance including processor subsystems, job queues, job descriptions, memory pool allocation, support configuration, tuning, etc.

Optional Modifications

- Screen and/or report modifications (change in sorting, fields additions and removals, calculation changes)
- Application logic changes
- New reports
- New screens (for data gathering or options)
- Data base modification
- Specialized payroll accrual formats
- Interfaces to outside systems or reporting facilities
- Data conversion
- Changes to standard job processes and schedule
- Additional site specific special forms not standard in application
- Electronic billing formats and/or providers
- Changes to bill forms including statement mailers
- Materials management specialized purchase order forms
- Payroll direct deposit bank interface modifications

Steps to Successful Implementation

- HCS compiles and sends a list of applications to be reviewed which includes suggested attendees, by title per application, and anticipated time frame for review of each application/session.

    - Typically, the client will send one or more department heads to each session along with one or more end users who are well versed in client operations and requirements. These key personnel will need to be available full-time to the sessions pertaining to their specific application areas. In addition, at least one knowledgeable and authorized person should be assigned as a designee, preferably from the IT department or finance/clinical areas, to provide continuity between applications and in all sessions. **INTERACTANT** is a fully integrated system and changes/requests for one application may have repercussions in other areas; having someone assigned across all areas will eliminate any conflicts that may arise.

- A kick-off conference call is held to identify location, dates, and times of systems review as well as identifying HCS and client representatives. The conference call will also outline initial preparation for the systems review. Typically, the client has seen demonstration(s) of **INTERACTANT** and has identified certain areas that will require modification. During the conference call, these items are outlined so that all parties are prepared to discuss the changes during the scheduled meetings.

- HCS sends a letter confirming systems review information including applications to be reviewed, dates, times, location, and attendees. Other information confirms specific points to be discussed for each application. For example, during the accounts payable session, the format of the check and remittance advice will be discussed. In addition, HCS will supply a list of data base files that are typically converted from the existing system to **INTERACTANT**.

- HCS sends copies of system documentation to the client, time permitting, at least two weeks before the scheduled meetings. The documentation includes screen and report samples for the users to review before the systems review.

- The client gathers information in preparation for the systems review. If certain changes are anticipated, the client should gather any documentation available to assist both HCS and the client in outlining the changes to be made. Special reports, forms, and bills currently used should also be gathered for discussion. Especially important are state and federal billing regulations and electronic transmission specifications specific to client. In addition, if interfaces to third party software are anticipated, the client should have a list of applications that will require an interface, as well as vendor, contact name, and telephone number. Finally, the client should be prepared to discuss which data base files they would like to convert from the existing system to **INTERACTANT**.

- The systems review sessions are held. Each **INTERACTANT** Application and associated reports are presented and reviewed. HCS and the client define the changes that the client would like to make. At a minimum, two HCS representatives will be present for all sessions; one will be responsible for presenting **INTERACTANT** and one will be responsible for documenting discussions.

- HCS creates a System Design document, which becomes part of the contract agreement between HCS and the client, listing all of the change requests made by the client during the systems review process. This document includes time estimates to complete the changes as well as anticipated cost. The document is forwarded to the client.

- The client reviews the System Design document. If any changes to the document are required, the client indicates what the changes are and returns the document to HCS.

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- The above two steps are repeated until all parties agree to the items described in the document.
- The client signs an approval form that authorizes HCS to begin work on the modifications described in the System Design document.
- HCS programs changes, modifications, and enhancements per the System Design document including creating system libraries, files, face sheets, electronic billing/remittance formats, etc.
- HCS creates conversion programs and file formats to bring data from the existing system to **INTERACTANT**. HCS will work directly with the IT department to review file formats and required specifications.
- HCS creates interface programming per the System Design with third party vendor.
- Once programmed and complete, HCS will test System Design, interface, and conversion programs until everything operates according to the System Design document.
- HCS will prepare system documentation and submit for client review. The system documentation reflects the **INTERACTANT** system installed at client site according to the System Design document.
- Client will conduct testing of the applications and programs to make sure they operate according to the System Design document.
- The next step in the implementation process is training. HCS utilizes a train-the-trainer method of training, and the client must identify their "super users" to train personnel at the organization. Once this is established, HCS and the client will outline the training process including application session dates, times, and locations.
- Once training is complete, a final review meeting is held to discuss system, documentation, conversion, and interface information as well as determine timelines for rollout to all the organization's sites/facilities.
- Go live and start of HCS ongoing system support.

To learn more or schedule a demonstration of **INTERACTANT**, please contact HCS at (800) 524-1038 or visit us on the web at www.hcsinteractant.com.