How To Implement A New Medical Practice Management System

☐ **Define your roll-out timeline:** Practice management software typically takes 2 - 4 weeks for data transfer, training, and implementation.

☐ **Form an internal team to review platforms:** Involve your administrative, medical coding, and medical billing personnel who will use the platform the most in the decision-making and implementation process. Getting their buy-in on the front-end can streamline training and ensure that your practice selects a platform that will best fit their needs.

☐ **Evaluate current practice workflows:** Take advantage of the software transition as an opportunity to review and polish internal processes. Focus on essential, time-intensive administrative tasks and see if there are any workflows that can be streamlined and simplified.

☐ **Configure and customize the new system:** Based on your practice's needs, your vendor's team of specialists will work with you to fully customize your practice management system's dashboards, forms, billing platform, patient portal, and reporting templates.

☐ **Migrate data:** Your software vendor will work with your team to transfer over patient and practice data into the new system.

☐ **Schedule team training sessions:** Ensure your workforce is well-trained in the new platform so they can use it efficiently after go-live.

☐ **Evaluate the system:** Once the new system is fully configured and online, do some internal testing with your staff to test its functionality and make sure everything is working properly.

☐ **Go live:** You're ready to start using your new practice management system!

☐ **Follow-up:** A good practice management system will grow and adapt with your practice over time. Your vendor should schedule follow-up appointments with your team to provide additional training and support, or to discuss system modifications.