Welcome to Elation Health

Onboarding Handbook

The purpose of this handbook is to help you understand the activities necessary for a successful implementation of your new EHR system. This Implementation will be a **collaborative effort** involving team members from your practice and your Elation Health Engagement Advisor. Please read through this handbook before your kick-off call and reference it for a successful transition to Elation!

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Implementation Overview

The purpose of this handbook is to help you understand activities necessary for a successful implementation of your new EHR system. It is designed to provide opportunities for advance planning and resource allocation, and timelines for deployment activities. This Implementation will be a collaborative effort involving team members from your practice and your Elation Engagement Advisor. Depending on the size of your practice and resource availability, the number of Elation project team members may vary. Activating any new EHR involves a multi-discipinary approach to preparing the new system, ensuring privacy and security compliance, designing workflows, training the care team, and managing the implementation process.

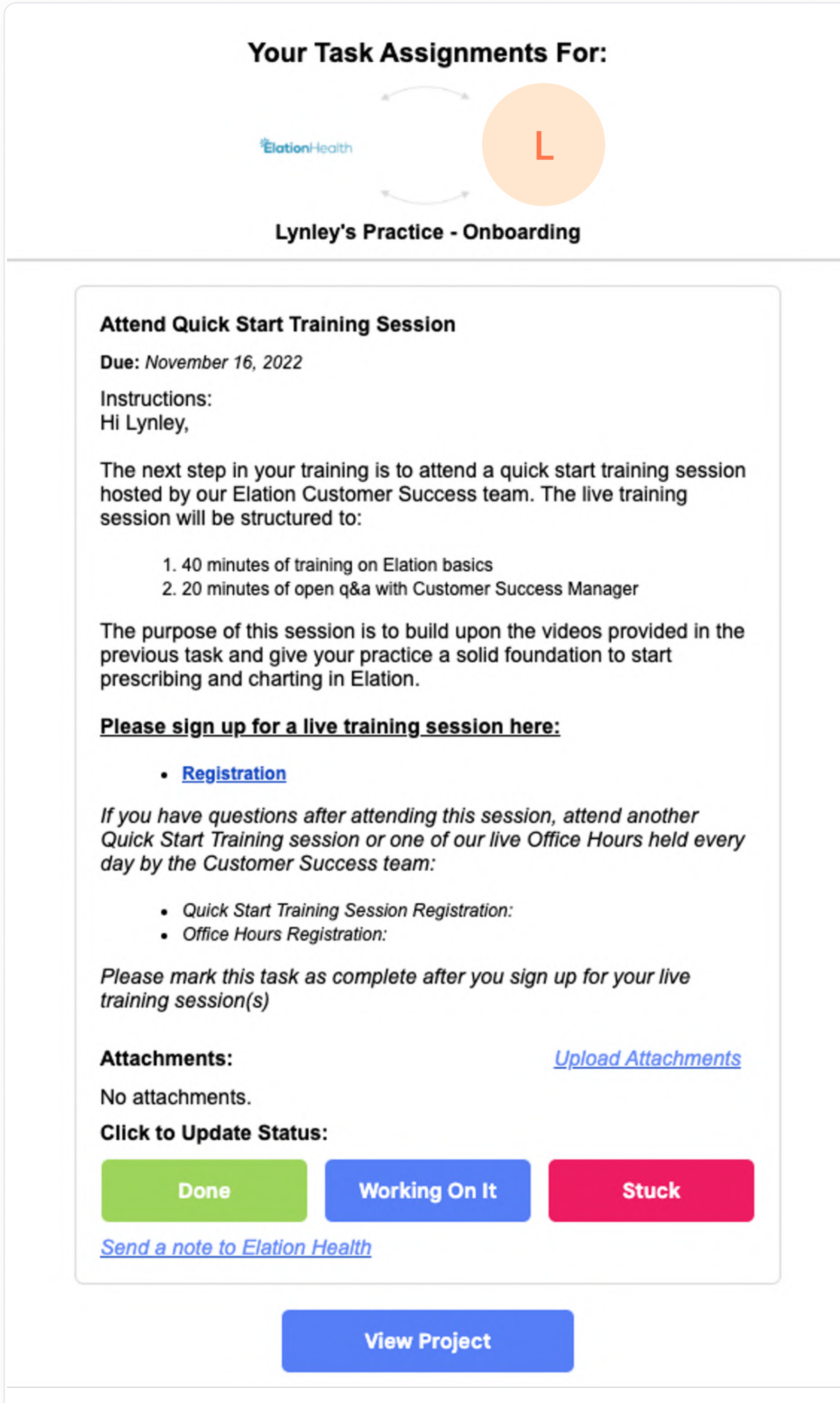
At Elation, a successful EHR adoption consists of stages 0 - 5. You can view additional details in the table below (stages 1 - 3 occur simultaneously):

Stage 0 **Account Set-UP**	**Stage 1** **Configuration**	**Stage 2** **Data Migration**	**Stage 3** **Training**	**Stage 4** **Go-Live**	**Stage 5** **Graduation**
6 Business Days	30-45 Business Days	5-10 Business Days	14 Business Days	7 Business Days	1 Business Days
Welcome email Implementation Survey Account Activation Kickoff Call Onboarding goals, expectations and timelines finalized Go-Live Date finalized	Account Authentication eRx Service Levels eFax Integrations Regular Check-ins	Data migration Sources of Data: Self Exports and Full Exports provided by previous EHR vendor Full Exports provided by previous EHR vendor	Training based on clinical roles Q&A Sessions Go/No-Go Live Meeting	Elation is source of truth Post Go-Live reports Final Q&A session Remediations, if needed	Formal introduction and handoff to Customer Success Sign up for Elation Success Community Submit Customer Experience Survey**

Onboarding guide

Elation assigns all tasks through our project management system. You will receive task assignments & reminders through your email. You have the option of updating the status of each task either through signing up and logging in or directly through your email as shown below.

To check the status of a task in your onboarding project (e.g., to find out if an integration has been completed), you can login to view the entire project. This will be discussed further on your kickoff call.



Your Task Assignments For:

ElationHealth

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Lynley's Practice - Onboarding

Attend Quick Start Training Session

Due: *November 16, 2022*

Instructions:
Hi Lynley,

The next step in your training is to attend a quick start training session hosted by our Elation Customer Success team. The live training session will be structured to:

1. 40 minutes of training on Elation basics
2. 20 minutes of open q&a with Customer Success Manager

The purpose of this session is to build upon the videos provided in the previous task and give your practice a solid foundation to start prescribing and charting in Elation.

Please sign up for a live training session here:

- Registration

If you have questions after attending this session, attend another Quick Start Training session or one of our live Office Hours held every day by the Customer Success team:

- *Quick Start Training Session Registration:*
- *Office Hours Registration:*

Please mark this task as complete after you sign up for your live training session(s)

Attachments: *Upload Attachments*

No attachments.

Click to Update Status:

Done | Working On It | Stuck

Send a note to Elation Health

View Project

Kick off call

What is a Kick-off Call?

The Kickoff call is a 30 - 60-minute meeting between you (the customer) and your Elation Health Engagement Advisor to initiate the onboarding plan and set expectations for the onboarding project. Please make sure the lead provider, lead administrative staff, and EHR decision-maker are all on the call. We will use this time to identify all of the items necessary to Go Live on Elation.

The agenda/discussion topics include but are not limited to

- Introductions / Point of Contact
- Project stages
- Survey
- Discuss this onboarding handbook
- Account set-up
- Set expectations for integrations
- Discuss data migration process
- Training
- Next steps + goals

After your kick-off call, you will receive a kick-off call deck reviewing information that was discussed on the call along with action items.

Please continue reading the handbook to gather information relating to integrations, fax, and data migration before your kick-off call. Make notes of any questions that arise, and we will be happy to discuss them on the kick-off call.

Configuration

KICK-OFF

GO-LIVE

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Hardware Recommendations

These specifications will help ensure that you have the best user experience with Elation.

Computer	PC & Mac compatible
Monitor Specifications	15” screen, 1440 x 1080 resolution (recommended) 13” screen, 1024 x 768 resolution (minimum)
Scanner	Multi-page, top-feeding scanner (fax machine can be used if it supports scanning)
Internet Speed	Download - 20 Mbps Upload - 10 Mbps (Click here to run a speed test)

Software Setup

Follow these software tips to access Elation’s log-in page quickly in the future.

1. **INSTALL GOOGLE CHROME OR FIREFOX**

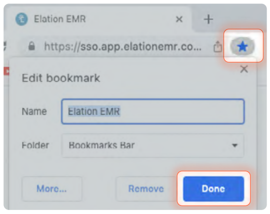
   Elation is optimized to run on Firefox or Google Chrome.

   Click here to download the Google Chrome browser for free.

   Click here to download the Firefox browser for free.

   It is best practice to use an incognito or private browser when using Elation to avoid saving PHI in your browsing history.

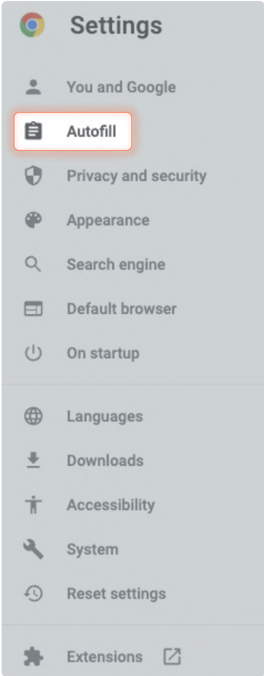
2 BOOKMARK ELATION'S LOGIN PAGE



In Chrome or Firefox, type in Elation's URL: app.elationemr.com

Click on the **Star** icon then click **Done**.

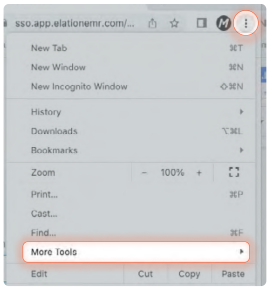
3 DISABLE CHROME AUTOFILL SETTINGS



To check the autofill Chrome settings, please follow the steps below:

- Select the three vertical dots in the top right hand side of your Google Chrome browser
- Select "settings" from the dropdown
- In the new tab that will open, please select "autofill" from the left hand side of the screen
- Please select "addresses and more". On this page you will see any saved addresses.
- **If you see saved information from the patient, please remove it from the settings**

4 CREATE AN ELATION DESKTOP SHORTCUT



Open app.elationemr.com

Chrome

Click on Chrome's **Menu icon > More Tools**

For PCs, select **Add to Desktop**

For Macs, select **Save Page As**

Firefox

Click the padlock icon on the left of the address bar while holding the mouse button down, move the pointer to the desktop, then release the mouse button.

Initial login

Each step in this section addresses a key component of your account. Completing the following in your settings enables us to switch your Elation account status from trial to active.

WARNING: Do not add real patient data while your Elation account status is **'test'**. If a real patient is created while the account status is 'test', rather than active, the patient will permanently remain marked as 'test'.

Click here to log in to Elation and navigate to the settings page

Click your email address in the top right hand corner

Click "Settings"

Click on the "Account Details tab"

Click "Edit Profile" in the top right hand corner of your profile

A pop-up window will appear where you can provide the following information:

STEP 1. Double check your name in Elation. Use your legal name, **without** credentials or prefixes and suffixes in First Name or Last Name fields

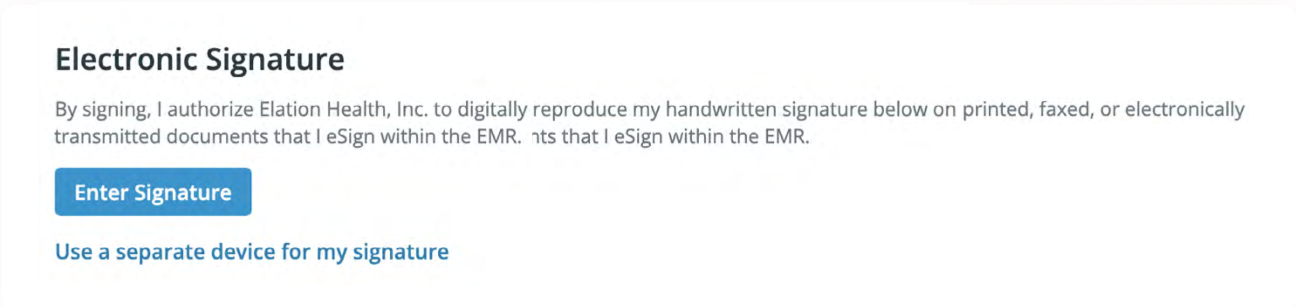
STEP 2. NPI number: enter all 10 digits of your **individual** NPI

STEP 3. IDP - Click on the "Verify identity through Stripe ID proofing" button under Authentication Documents in your Elation Provider Profile. A new page will open in your web browser directing you to Stripe's website for identity verification.
Click on the "Get started" button. For more information on Stripe IDP, please click here.

STEP 4. Medical License Upload

STEP 5. ESig – Click the "Enter Signature" button to draw your signature and store your wet signature on your account. Click "Save & Close" after drawing your signature to save it. If you need to edit your signature, click on the existing signature to make changes.

If you prefer to use an alternative device to draw your signature, such as a tablet or phone, click the "Use a separate device for my signature" button to scan a QR code with the alternative device. For more information on the electronic signature, click here.



Add Users

Staff Invitations

You have a strong, capable team - invite them to register their user accounts so you have all hands on deck to customize your Elation workflows.

Click here to invite your staff to Elation. You will need to enter their email addresses, first names, and last names. Here is a Help Center article to explain how.

For single-provider practices: If you are considering utilizing Electronic Prescribing of Controlled Substances, setting up these access controls requires a total of two Elation users (one user being yourself). Please make sure to send your second user a staff invitation. If you do not have any staff, ask a trusted friend or family member to assist you. Please note, this step is solely to add the second user to Elation. You will then receive the next steps on setting up EPCS from our team. The EPCS process is managed by our partner, MD Toolbox, and must be completed to legally prescribe controlled substances.

Electronically Prescribed Controlled Substances signup instructions here.

User Licenses

Full-time Prescribing Provider - can sign off on visit notes, reports, and orders, has full prescribing privileges, can send letters and referrals, has a calendar and Zoom virtual visits capabilities

Non-prescribing Provider - can sign off on visit notes, reports and orders, send letters and referrals, has a calendar and Zoom virtual visit capabilities

On-call - can sign off on visit notes reports, can send letters and referrals, has regular e-prescribing privileges. On-call accounts do not have Zoom or EPCS capabilities

Regular Staff - can send letters

Staff Delegates - can sign off on regular prescriptions, send orders, referrals, and letters

System Account - calendar use only

Admin user permissions: administrative controls and settings that allow for customization of the EHR

Help Center page on user accounts **here**

Training

KICK-OFF GO-LIVE

What does Training Look like?

1 CORE TRAINING

Each Provider, Admin Staff, and Staff member at your practice will be guided through a core training specific to each role using our onboarding guide. This training will include reviewing training videos as well as completing practice assignments to test your new knowledge of the app.

2 LIVE TRAINING SESSIONS

Weekly, our Customer Success Team will be leading live training sessions for anyone in your practice to attend. During this training, we will review basics of the app and leave time at the end for Q&A.

3 OFFICE HOURS

Our Customer Success Team holds office hours every day for any practice to attend and ask general questions. This is a great resource for live feedback on your training as you get started, as well as for questions that may arise after implementation.

What should I do **after** each training video?

We strongly recommend practicing on sample or actual patient charts to reinforce what you've learned and create cohesive workflows from the tools and information presented during training.

In increasing frequency, we suggest completing the following exercises:

- **eRx:** ePrescribe for your patients
- **Clinical Profile:** Add data to the Clinical Profile for patients
- **Visit Note:** Create visit notes in Elation

Practice Settings Checklist

KICK-OFF GO-LIVE

We believe your EHR should feel familiar, so our Settings page gives you direct access to personalize your account and make Elation your own. After your Kick-off Call, please start to explore these settings. Click on the icon for more information regarding each item. *(Note: Settings with an * can only be maintained by Admin Users.)*

Administrative Preferences

Admin Users*	Assign the admin users of your practice
Staff Delegates	Delegate who can prescribe, place orders, and edit billing on your behalf
User Groups*	Create message groups for internal office messages
Scheduler	Customize appointment types and exam rooms
Report Types*	Add report types

Practice Locations	Confirm practice service location(s)	
Print Headers	Customize print headers with your logo	
Patient Passport*	Manage Passport preferences and message routing	

Clinical Settings

ROS Templates	Create ROS templates for your visit notes	
PE Templates	Create PE templates for your visit notes	
Lab Order Sets	Combine multiple lab tests under order sets	
Rx Order Sets	Save commonly prescribed meds, sig, quantity, and refill combinations	
Handouts	Upload your patient handouts to Elation	
CPT Codes	Add your commonly used CPT codes; alternatively, populate an Excel spreadsheet with all codes for Elation to import (If interested, please inquire with your Engagement Advisor)	

Live

What is Go-Live?

Your Go-Live date is when Elation Health becomes your source of truth, meaning all new clinical data is entered into Elation.

How do I prepare for Go-Live?

STEP 1. Confirm that you've completed your **Practice Settings Checklist.**

STEP 2. Confirm Go-Live date with your Engagement Advisor

STEP 3. Complete Core Training and attend a Live Learning Session

Best Practices Checklist

When your practice is live in Elation, there are a few best practices that we recommend to help manage your workload.

On your Practice Home page, you'll find your Requiring Actions Queue, which highlights all of the outstanding tasks in your account.

On a daily basis, we advise reviewing each of these queues to address any outstanding items.

Queue Name	Queue Description and Suggested Action For Users
Office Messages	Internal team correspondence • Reply to message threads. • Click “Sign” to complete threads. • Click “Acknowledge” to hide completed threads.
Rx Refills	Incoming pharmacy refill requests • Process requests for prescription refill requests.
Reports	Electronic test results from vendors and files uploaded from your computer • **Clinicians Only:** Sign reports
Provider Letters	Incoming referrals and messages from providers • Review and process inbound referrals or other documents
Draft Notes	Unsigned notes • **Clinicians Only:** Complete pending notes, delete extraneous drafts.
Draft Letters	Unsigned referrals and letters • Complete pending referrals and letters, delete extraneous drafts.
Draft Orders	Unsigned prescriptions and orders • Complete pending prescriptions and orders, delete extraneous drafts.

Resources

Additional Elation Features

Patient Payments: Elation partnered with Stripe, a secure, Payment Card Industry (PCI) compliant, digital, payment processing platform, to provide you with the ability to collect payments from your patients directly within Elation. Using Elation Patient Payments, your practice can collect payments for any services you offer, at any time during the day, and manage your full transaction history directly within Elation.

Membership Management: The Membership Management functionality provides a convenient and flexible way to create and manage recurring membership plans or fees directly within the EHR. Additional functionalities include:

- enrolling patients in individual or group memberships
- automatically notifying patients when a payment is due
- automatically billing patients on a preset schedule
- charging a patient's card on file (if preferred)
- sending patients notifications if there are any changes to their plans
- reporting on memberships and enrollments

Virtual Visits: Elation Integrated Video is a video integration, powered by Zoom ©, that allows you to see patients using two way, real-time, interactive audio and visual communication seamlessly integrated into the EHR workflow.

Integrations

Elation's API and HL7 capabilities enable the platform to work with a variety of different partners (labs, practice management, billing systems and software tools) to create a comprehensive solution for your practice. Check out Elation Health Integrations (https://www.elationhealth.com/integrations/) to see a list of active partners.

If you see an integration listed with an established partner:

Please be sure to let your Engagement Advisor know which integrations you need. Contact your Engagement Advisor or integrations@elationhealth.com with the following:

- Vendor Account Number (if applicable)
- Vendor Contact/Rep's email addres

If you **do not** see an integration listed with an established partner, please share the following with your Engagement Advisor:

- Vendor Name:
- Vendor Website:
- Brief description of Vendor (if possible):
- Name of Vendor contact or rep:
- Vendor contact or rep's email address:

Interface setup time with established partners range from a few days to several weeks. The timeline for non-established integrations depends on the vendor's resources and availability. It is advised to go-live on Elation's platform once all neccessary integrations have been completed. However, if you do plan to go-live before all integrations are complete, please speak to your Engagement Advisor about the risks associated.

Practice Management System (PMS) Integrations

PMS integrations allow for patient demographics, appointments, and billing data to flow seamlessly between Elation and your PMS. If Elation partners with your PMS system, your Engagement Advisor will help coordinate the interface setup. If we do not currently partner with your PMS vendor, you still have the ability to export a Billing Report (in spreadsheet form) from Elation to facilitate your billing workflow. This spreadsheet contains patient demographics, insurance, diagnosis codes, and billing codes from your signed visit notes.

If your PMS is interfaced with your previous EHR, your Elation PMS interface will be activated on your Go-Live date. If your PMS is not integrated with your previous EHR, we can activate the integration with Elation right after your kick-off call to migrate your patients' demographics.

Elation eFax

Your Elation account includes a complimentary e-Fax number. If you are subscribed to our standard "Per-Provider" pricing model, you are given 1,500 free inbound/outbound pages per month, per provider.

Documents sent to your Elation e-Fax number will appear directly in Elation, giving you a single source for all inbound correspondence that you can access from anywhere with an Internet connection. (resource here)

If you **do not** have an existing fax number, Elation can set up a new fax line for you with your chosen/local Area Code.

If you **do** have an **existing** fax number that you would like as your Elation eFax number, there are two options:

FAX PORTING

Fax porting allows you to keep your existing fax number while porting to Elation's fax provider/carrier. Your original fax provider/carrier will be disconnected and Elation's fax provider/carrier will now own this number. Fax porting is our recommended process.

If your current carrier permits fax porting, request that your existing number is transferred to Elation's fax carrier.

If you select fax porting, there will be an LOA form for you to fill out and a request for proof of ownership in our project management system. Once completed, if there are no carrier rejections or additional information needed, the process takes 5-10 business days.

FAX FORWARDING

Fax forwarding allows you to keep your existing fax number with your current fax provider/carrier and forwards faxes to Elation. You will continue to pay your current fax provider. NOTE: There is a high failure rate associated with fax forwarding.

We will need to create an Elation fax number to which you can then configure your existing fax number for forward inbound documents.

If you select fax forwarding, you will need to contact your existing fax carrier to set up forwarding. You will receive an email when your fax number is ready in Elation for forwarding configuration.

Data Migration

Bulk data is a great asset, but by no means is it a necessity to start taking advantage of what Elation has to offer. Since bulk data exports are not a guarantee, please contact your previous EHR's support team with the following questions:

1. What patient data can I bulk export myself and what patient data do you export for me?
2. How soon can I request a bulk export?
3. How long would it take to receive my bulk data?
4. How much would it cost to export my data?

The quickest way to start charting is with our **Just-In-Time** approach. With Just-In-Time, your practice only needs to migrate 3 reference points ahead of the patient's appointment: the patient's clinical summary, your last progress note, and (if applicable) their latest lab results.

A few minutes of prep for each chart translates into your practice's ability to start charting immediately. Just-In-Time gives your practice full control over your timeline and eliminates the build-up of stale data in your previous EHR.

Overview

If you request to virtually meet with a team member from Elation's Data Services team to speak about migrating your data to Elation, we will contact you with details on how to schedule a meeting. If no meeting is requested, all correspondence relating to data migration will take place via email. Elation will reach out to you with details on exporting your data from your previous system and importing it to Elation regardless of whether or not you request to meet over Zoom.

Elation offers one (1) complimentary standard demographics import, one (1) complimentary standard appointments import, one (1) complimentary standard bulk C-CDA import, one (1) complimentary standard historical labs import, one (1) complimentary standard visit notes import*, and one (1) complimentary standard bulk document import. Elation reserves the right to charge up to $500 per import for any subsequent imports.

Non-Standard data is data that requires advanced manipulation to meet the required specifications to be imported; or to meet the customer's requirements for the migration. Non-Standard data will often incur a fee to be imported. Elation's Data Services provides the designation of Standard or Non-Standard and will let you know if your data is Non-Standard, as well as if a cost will be associated with the migration.

Once the data export is received by the customer, the customer transmits the data to Elation via secure file transfer or using Elation's internal secure messaging system. Please do not send any of your patient data over open email - this includes any reference to name, date of birth, or other personally identifiable information. Elation is not responsible for data which is shared via a non-secure method.

Upon receiving the data, the Data Services team will review the provided data and a request will be submitted to the Elation's data imports queue and processed accordingly. Elation's Data Services team works to ensure that all data import requests are completed before a practice go-live. However, in the instance of an expedited go-live, we cannot explicitly guarantee data import delivery quicker than our specified SLAs, noted below.

Milestones

1. Data Services Manager & Customer review
2. File sharing is set up and provided to customer
3. Customer to export and provide data from previous system
4. Data Success Manager reviews data specification with Customer to identify any issues and define custom requests if applicable
5. Data import request is submitted into data imports queue
6. Data is transformed if applicable and imported into test environment
7. Quality Assurance review
8. Any required changes are completed if applicable and data is pushed to production

Import Types & Formats

Standard and Non-Standard data is defined as whether or not the data is aligned with the formatting and structural details that allow the application to ingest the data without significant alteration. If data does not meet required specifications, it is considered non-standard as it requires more complex transformations - which in turn takes longer and may incur a cost to transform. Elation's Data Services team designates if the data does or does not meet the required format specifications.

Examples of not meeting required specifications include, but are not limited to: Documents without mapping, or that do not contain complete patient identification items in the file name or file path, incomplete data sets, patient duplication, and unsupported formats. If the data is not provided in a supported format or is incomplete and requires more information, Elation's Data Services team reserves the right to designate the request as **not actionable** and may not be able to complete the import.

Data Import Type[1]	Details	Accepted Formats[2]
Demographics	Name, DOB, gender, contact Info, insurance, other	.csv, .xls, .xlsx, .txt
Appointments	Appointment date, time, duration, type	.csv, .xls, .xlsx, .txt
CCDA	Allergies, immunizations, medications, problems	HL7 CCDA R2.1 **.xml only**
Bulk Documents	All patient documents - varies by Vendor	.pdf, .rtf, .tiff/.tif, .jpeg/.jpg, .png, **other**[3]
Historical Labs	**HL7** formatted lab files	.hl7,.crnl, .omrm .xml, .GL7, .OL7
Visit Notes	SOAP notes (Non PDF)[4]	xlsx

1. There is **no guarantee** that data provided in non-supported formats can be imported.
2. At this time, only some vendor **Database backups** (.bak, SQL Server, MySQL, etc) are supported.
3. HTML, Microsoft docs, excel, zip, encrypted, etc are not renderable. These files will not be viewable within Elation and will instead open in a new tab/be downloaded when selected.
4. Elation cannot import Visit Notes provided in tabular format, such as csv, xls, xlsx from vendors other than Practice Fusion and Amazing Charts.

Timelines

Your Data Services Manager will work with you to understand how your previous EHR packages your data and determine the best strategy for data migration. Vendors vary in the file formats that they support and the comprehensiveness of their exports. Regardless of their offerings, our goal is to empower your practice with options to help you derive value from Elation **as soon as possible.**

Most vendors generally offer a mix of export options: **self-serve export tools** in which the customer can obtain data (generally this is only available for demographics and/or CCDAs) and **full exports** performed by the vendor that contain all data. Full exports from vendors vary in delivery time, but can generally take anywhere from 4 to 8 weeks. Timing an export request to fit your needs is often crucial to the successful adoption of Elation. Once data is exported, anything added to a previous system will not be included.

Delayed Export

Self-serve data is exported 5 business days before the go-live date, and if applicable a request for a full export is also submitted to the previous vendor. As soon as the exports are initiated, Elation will work as efficiently as possible to import a minimal amount of data so that the customer can begin charting in Elation while referring back to their previous EHR for historical patient data.

This approach requires that the practice has reviewed training materials enough to be comfortable charting in Elation as soon as the export and import process is complete. It also requires meticulous coordination with the Data Services team, previous vendor, and Technical Implementation Specialist. Best practice for this approach is to time the export and charting to coincide with the activation of integrations.

Immediate Export

For certain situations, customers prefer that their data migration begin as quickly as possible. This is primarily the case when they would like their patient data to be in their Elation instance to reference during training, or when the previous vendor has limited export options. In instances like this, data is exported from the self-serve tools or requested from the previous vendor shortly after the Kick-Off Call. The practice can continue to chart in their previous EHR while completing the training materials. When the practice feels comfortable and the training in Elation and integrations are fully connected, then additional exports are performed to capture any data that was added to the previous EHR after the initial exports were performed.

Import Timelines

Timelines are dependent on current volume, customer involvement, file size, and whether or not a data set is designated as Standard or Non-Standard. If the data provided for an import request is deemed not actionable at any time, the timeline for the import is reset from the date the file is provided in a format that the Data Services team designates as actionable. The maximum number of business days to complete a data migration is outlined below:

Data Import Types	Standard Timeline	Non-Standard Timeline
Demographics	3 business days	5 business days
Appointments	3 business days	5 business days
CCDA	3 business days	5 business days
Bulk Documents	10 business days	15 business days
Historical Labs	3 business days	5 business days
Structured Visit Notes	5 business days	10 business days

All timelines are also dependent on file size. For example:

1. Bulk Document imports that are larger than 300GB may require beyond 30 business days.
2. Elation is only able to accept database backups (.bak) from select vendors at this time.
3. HTML, Microsoft docs, excel, zip, encrypted, etc are not renderable. These files will **not** be viewable within Elation and will instead open in a new tab to be downloaded when selected.
4. Only structured visit notes from **Practice Fusion, Amazing Charts, and Isalus** are supported at this time.

Quality Assurance

Customer involvement in the QA review is available for each data import request. Elation's typical QA call is facilitated by a Data Services Manager and involves a screen share where the imported data can be reviewed in a test environment. Customers are afforded the opportunity to identify changes they'd like to be made to each data import. Elation will work within the boundaries of the provided data to accommodate these requests.

Customer involvement can be omitted should the customer choose to do so. If the QA call is omitted, this is considered consent to import the data as-is and any changes to the data thereafter will be considered a subsequent import. After the QA process has been completed, data requests are imported to Elation's live application. Once this occurs, a data request is considered satisfied.

Quality assurance can also impact delivery timelines. If the Customer is unavailable or choses to omit a QA call with Elation, the QA will be completed at the discretion of the Data Services team and pushed to production per Elation's internal standards.

If the Customer would like to attend a QA call to review the data imported into the test environment, the Customer is given three business days from the day the data is imported into the test environment to coordinate an agreed upon time with a Data Success Manager. If the Customer does not schedule and attend a requested QA call within five (5) business days, the agreed upon delivery timeline is subject to be negated per the discretion of Elation's Data Team. Fulfillment of these additional changes are not subject to any fee.

Sharing Data with Elation

There are two methods of secure file sharing: (1) Elation's Internal tool for single files up to 200MB or less than 10 separate files per import type; (2) Amazon Simple Storage Service (S3) via Cyberduck or any other secure file transfer client.

The customer is responsible for downloading their data export from their previous vendor's file sharing or export method and providing the data to Elation. Elation does not accept hard copies of data in the form of physical hard drives. Elation will not be responsible for downloading data exports from any external vendors file sharing or secure link methods unless both Elation and the Customer have mutually agreed to do so. Any request to assume responsibility of downloading the data for the customer is subject to a custom data migration fee.

Patient Charts & Demographics

Elation can automatically create charts for your entire patient panel in Elation. This spreadsheet usually includes basic demographic and insurance information and can often be exported from your previous EHR or PMS system. The import process typically takes 3 to 5 business days.

1. Data must be provided in either csv, xls, xlsx, or txt format. Each patient's information should be listed in one (1) row; if information is spread for patients across multiple rows, Elation cannot guarantee that we can perform the demographics import on your behalf.
2. Four (4) fields are required to create a patient chart in Elation: First Name/Last Name, Date of Birth (DOB), Gender, and Primary Provider in Practice (PCP). If any of these elements are not included, the following will occur:
   a. Missing first name and/or last name: patient's data will be skipped and not imported into Elation.
   b. Missing date of birth: patient's data will be imported with default of "01/01/1900".
   c. Missing gender: patient's data will be imported with default "unspecified."
   d. Missing PCP: the Elation admin Provider account will be assigned to the patient. Please note only Elation Provider accounts can be assigned as a patient's PCP.

If the date of birth, gender, or data in both of these fields is not populated for patients in the demographics file, and you authorize the import, you must manually enter any additional demographics information not included in your original data file. Elation cannot repeat the import.

Appointments

Appointments can also be created in bulk if they are provided from your previous EHR.

Please note that if a patient chart is not present in Elation, but that patient's appointment information exists in your appointment export file, Elation will not be able to create that patient's chart in Elation. The appointment, as a result, will be ignored and not imported into your account.

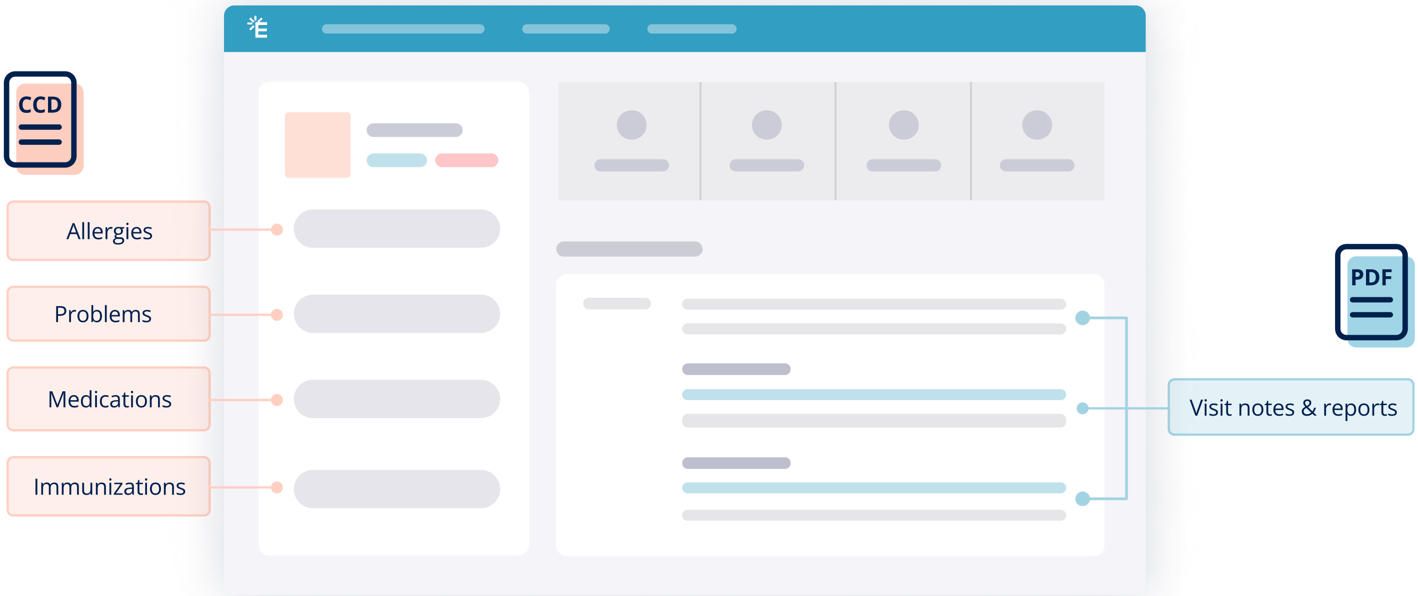
1. Appointment data **must be provided in** a .csv, .xlsx, or .xls format.
2. Six fields are required to create an appointment in Elation
    a. Patient First Name
    b. Patient Last Name
    c. Patient Date of Birth
    d. Appointment Date & Time (YYYY-MM-DD hh:mm:ss)
    e. Appointment Duration
    f. Provider Scheduled (If not provided, will go to default)
3. Additional fields are supported for the import as well including:
    a. Patient Gender
    b. Appointment Description
    c. Appointment Type
        i. Please note that if you would like Appointment types to be migrated from your previous system, you must request that Elation create the appointment types in Elation prior to the import.
        ii. If you would like to map previous appointment types into standard Elation appointment types, you must notify Elation and collaborate with your Data Success Manager prior to the import.
    d. Appointment Status (Scheduled, Confirmed, Checked In, In Room, In Room - Vitals Taken, With Doctor, Checked Out, Billed, Not Seen, Canceled)

Historical Labs

After your lab interfaces are set up, we can request historical results from your lab vendors. These reports would populate your patient's charts with structured test results that can be trended over time. Historical labs must be provided as HL7 ORU files to be imported. Generally, your lab vendor will provide historical lab results for the past two years as HL7 ORUs if they are requested to do so.

Clinical Data & Documents

In the EHR space, clinical data usually comes in two formats: **CCDAs** and **Document Files.**



CCDAs are standardized XML files that transfer structured patient data from one EHR to another. They move the **allergies, problems, medications,** and **immunizations** that you documented in your previous EHR to the corresponding sections in Elation's chart.

Document files can include visit notes, correspondence, results, scanned images and other reports from your previous EHR. Once uploaded to an Elation chart, these items will appear in the chronological record as new attachments that can be viewed.

Medical History Data

The bulk C-CDA migration discretely imports the following structured information into your patient charts:

1. Allergies
2. Demographics (patient first name, last name, date of birth, gender and address)
3. Problems with ICD-9 or ICD-10 coding
4. Medication name, strength and SIG (if available)
5. Immunizations

C-CDA imports also create a patient summary document, which contains searchable sections of information that are unstructured and are not able to be imported discretely into your patient charts which may include: past medical history, family medical history, vitals, etc. The patient summary file will remain accessible in your patient charts as part of the chronological record to review and reference at any point in time. Elation accepts C-CDAs provided in XML format that meet HL7 R2.1 standards.

In addition to the medical history items above, Elation is also able to import other data points if they are provided in txt, csv, xlsx format or via a supported database backup. These additional items include vitals, free text medical hx entries (i.e. general, surgical, hospital, family, social, diet, exercise, habits), and more helpful information from the sections above than is generally provided in a C-CDA. Elation's data services team will be available to discuss the details of this import with you further both during and after your kick off call.

Documents

After receiving a bulk document export, Elation will evaluate the files and their relative paths. Metadata (or index, or mapping) is what relates a document to a patient by parsing out demographic data and associating it with the file path. This is also what provides document details such as dates, titles, and categories.

1. If a mapping or index file is provided, Elation will use it to import after validating it is accurate. If the Customer would like to provide specific instructions for titles, dates, and document types, they must notify their Data Services Manager before the import process begins.
2. If a mapping or index file is not provided, Elation will need to manually generate a mapping file. This would be an example of a bulk documents import being designated as Non-spec and requires more time to create a document to patient mapping.

   If no document date is provided, documents will be given the date the documents are imported.
3. If no relevant document title or document type information is provided, the Data
4. Services team will use the file names and OldRecord.

All the file paths for documents and relevant information are parsed by separating each directory level or utilizing supporting files within the export. The data team familiarizes themselves with the file path and file name to obtain document types, dates, and titles in order to create a metadata file to properly load the documents into Elation.

We are able to define a document type based on the available options within the Elation platform. We will attempt to identify if the documents provided match up to one of the data fields. If we aren't given instructions on labeling or it is not clear what the document type is, it will be given the **OldRecord** value.

Elation **must** be able to map the documents provided to their relative patient chart, meaning that first name, last name, and date of birth must be provided in either a demographics file or mapping file.

File Types

Elation converts certain file types into images when they are able to be rendered. If we cannot render the file, it will be available to download through the document viewer and opened in a new tab. Rendering is taking an image or file and converting it into another format or applying a modification. This is what allows providers to view files within the tool itself. The bulk document migration discretely imports the following structured information into your patient charts.

- **Renderable:** PDF, TIFF/TIF, JPG/JPEG, PNG, GIF, BMP
- **Not Renderable:** HTML, XML, TXT, RTF, Microsoft docs, spreadsheets, zip files, encrypted pdf, other file types

Elation imports documents as they are provided, and our standard bulk documents service does not support any file type conversion services, patient filtering, document filtering, or partial imports. Any of the listed items will be subject to the terms and conditions of a custom import.

FAQs

What happens if I forget my password?

Click on the "Forgot Password?" link on the login page, which can also be accessed here.

Why can't my staff login yet? How do my staff sign up for their accounts?

Your staff will need to be invited to set up their accounts first. You can invite your team by accessing your Settings page and clicking on "Manage Accounts".

What do I do if I have questions?

Engagement Advisor for onboarding support

During implementation, your direct point of contact for questions is your Engagement Advisor. You can submit your questions via our onboarding guide or directly to your Engagement Advisor.

Technical Support

Additionally, you can send questions directly through Elation's "I need help" button at the top of the application. This creates a ticket for our Support team. The Support team is your best resource for technical questions.

Platform training for staff and providers

A great resource for learning the platform is the live Office Hours and Learning Sessions held daily by our internal team. To sign up for these Office Hours and Learning Sessions, please access our Elation University page: https://elationstaging.wpengine.com/elation-university/

Elation Help Center

Our website's Help Portal is also a great resource with an abundance of articles.

How will I meet with my Engagement Advisor?

Meetings will be held online using a web conferencing service called Zoom.

You will receive a meeting URL prior to each call to join the session. For the screenshare portion, please access this link on your computer. For audio, you can use your computer mic; if you do not have a computer mic, you can also call into the meeting with your phone for audio.

Details and troubleshooting for Zoom can be found at this link.

Support

Our Support team is available to answer all of your troubleshooting questions! You may use the 'I need help' button in the app, or send your questions via our webform [https://www.elationhealth.com/contact-support/]. You should receive a response within 1 business day.

Though our main method of support is via email, if your inquiry would be better handled via phone, please request a phone call in your message and provide the best number for us to reach you directly. We are always happy to call you!

If you have an issue that interferes with patient care, please use the 'Urgent! I can't care for my patient' option under the 'I need help' drop-down in the app. Our team will call you within 30 minutes 24/7 365 days a year. Patient care comes first!

What can I expect from my Kick-Off call?

On your Kick-Off call, you'll have a chance to meet your Engagement Advisor to discuss your goals, practice workflow, and implementation timeline. You'll also dive into your Elation account to start basic training to empower you to start charting.

Is there a patient chart that I can practice with?

Your Elation account comes with a patient named "Sample Demo Patient" that has been pre-populated with sample notes and clinical data. Feel free to practice with this chart.

You can also create your own practice patients in Elation by clicking on the "New Chart" button on the homepage.

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