



Clinic Implementation Checklist

STAGE 1: ADVANCE PREPARATIONS

Physician Champions:

Identify physician champion(s) to lead the adoption of *myHEALTHware* in your clinic or practice.

myHEALTHware Administrators:

Identify 1-2 members of the clinic team to act as administrators for *myHEALTHware*. The responsibilities of the administrators include:

- Managing staff roles and security privileges;
- Management of organization settings; and
- Management of the billing and subscription model for the clinic.

myHEALTHware Organizational Set Up:

Identify a single member of the clinic team to initiate the organizational set up of *myHEALTHware* (must have Admin privileges in SOAPware EHR).

Clinic Super Users:

Identify super users to support the clinic team and patients after the launch of *myHEALTHware*.

Super users are the “go to” people in your clinic who will assist your end users (clinic staff and patients) with basic navigation questions. The super users can provide immediate response to “how to” or “I can’t get it to work” issues. They may also assist with new employee training and typically serve as the contact person in the event an issue requires escalation to SOAPware for assistance.

Staff Training:

All clinic team members should complete standardized in-service training, utilizing the training resources supplied by SOAPware (webinars, online documentation, videos, etc.).

Marketing to Patients:

Launch a well-coordinated marketing effort announcing the impending launch of *myHEALTHware* utilizing marketing materials provided (marketing to-do list, videos, print materials, website, etc.).

STAGE 2: ACTIVATION & ENROLLMENT ACTIVITIES**myHEALTHware Account & Organization Set Up**

- Activate myHEALTHware** (*Activation Key Required*)
- Complete the myHEALTHware Setup Wizard** (*Administrator*)
 - Set up administrator account and log in
 - Set up Organization
 - Set up myHEALTHware roles for clinic team users
 - Set up the clinic's myHEALTHware subscription price and billing agreement
- Complete clinic staff training** (*All Clinic Team Members*)
- Set up individual myHEALTHware accounts using Setup Wizard** (*All Clinic Team Members*)
- Begin enrolling clinic patients as myHEALTHware users**