New Client Checklist

Note: Refer to the Practice Mate training videos, as needed, for how to do each step.

1. Get the following contracts signed:
   - Billing Service Agreement
   - Compensation addendum
   - HIPAA Business Associate Agreement

2. Collect the setup fee

3. Immediately call Office Ally and begin the enrollment process

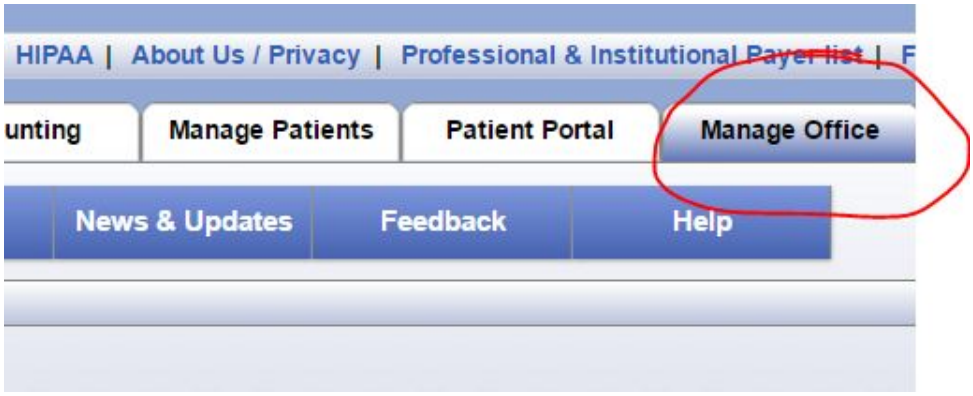
4. Get from the office:

   - New Client Information Sheet
   - Master Fee Sheet with applicable charges
   - Master diagnosis list (if they have one)

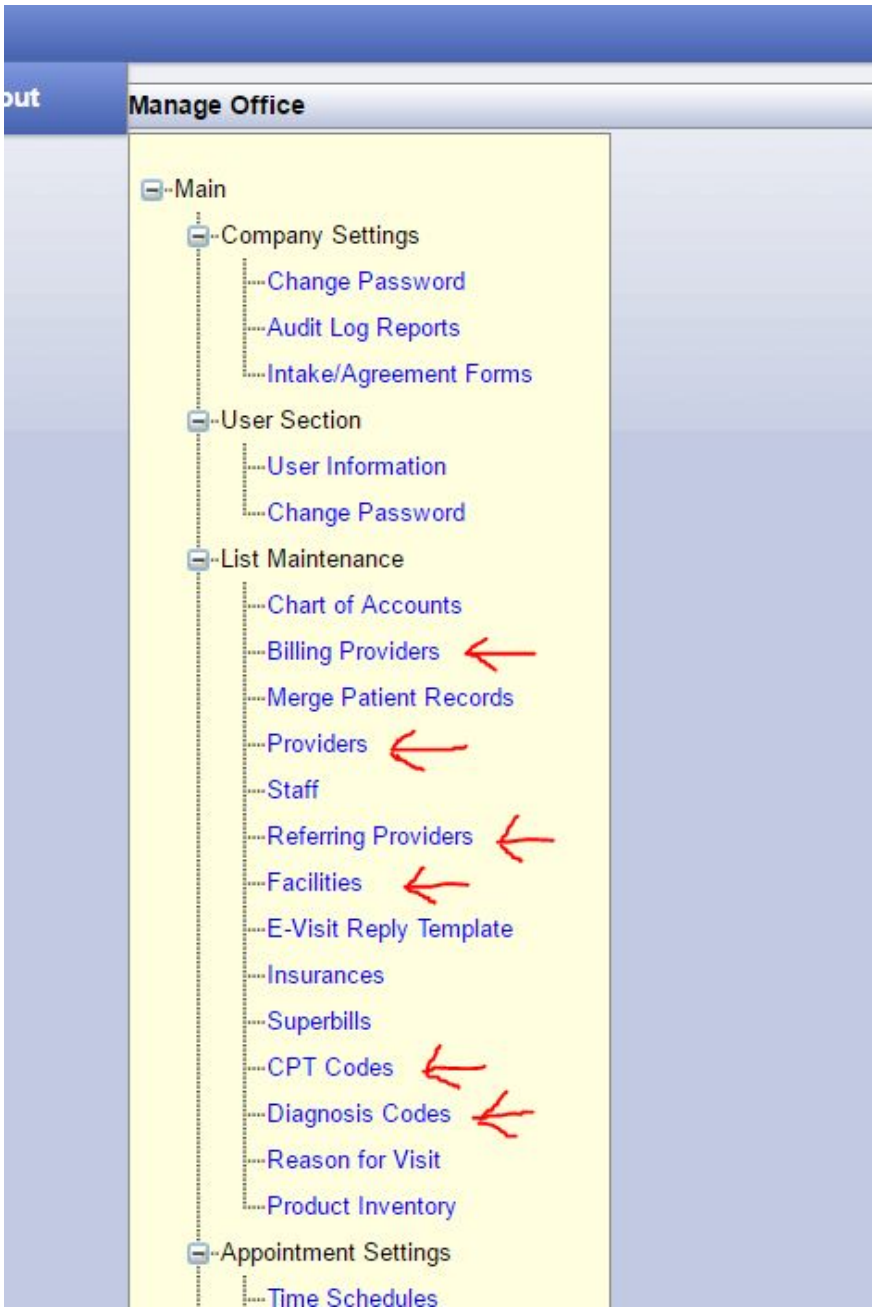
5. Using the above, In the “Manage Office” tab, enter in:

   - The facility (Facilities)
   - The billing provider (Billing Providers)
   - All other providers (Providers)
   - All services and their charges (CPT Codes)
   - Diagnosis codes (if you have them) (Diagnosis Codes)

Manage office tab:



Menu in Manage Office area:



6.) Inform the person who is responsible for sending you the daily patient data and the checks and EOBs exactly how to do so. (Upload to website, secure email, etc.)