

## Converting from Advanced to Premier

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Before you convert your office from Advanced to Premier, there are several steps you should consider before going live. Because billing is such an important part of your business, it is important that you take your time and make sure you are ready to accommodate all the changes that this improvement will make.

**Need Help?** Premier's [online help](#) is available or email [support@ezclaim.com](mailto:support@ezclaim.com)

### Critical Processes Checklist

You will be able to sample the Premier program before going live with it. This is a critical period of time which allows you to ensure that your staff knows all the features of the program that they are likely to need. Ensure that your billing team has practiced each of the following processes before committing to using Premier:

#### Company Cleanup

- [Premier allows for multiple company \(database\) files](#). You may split up your Advanced Patient Groups into separate company files.
  - If you use a Clearinghouse, please contact EZClaim for further instructions regarding splitting up Patient Groups into separate company files.
- Be sure to check your Payer and Physician/Facility Libraries. Now is a good time to merge duplicate entries or remove any unnecessary entries.

#### Data entry

- [Creating new patients](#) from scratch
- Editing patient records
- [Creating new patient claims](#)
- [Entering payments](#)—the method for entering payments has changed significantly

#### Reports

- [Reports](#) — Advanced reports ARE NOT AVAILABLE in Premier. Some reports are the same but many have been combined and improved.
- Verify you can get the data you need out of the new, more powerful reporting options. For each report you used in Advanced, practice creating the new report out of Premier.
- [Statement](#) functionality has been greatly improved with Premier. Make sure you understand how the new statement system works.

#### Printing

- [Print claims](#) — take this time to setup your printer alignment

#### Electronic Billing

- [Send a test claim](#) to each of your payers (or clearinghouse). The more varied the test claims, the less chance of an issue after going live.
- View the responses from your payers and update the database as appropriate.

#### Scheduler

- [Create and edit patient appointments](#)

- [Create and edit resources](#)
- Profiles are not migrated from Advanced Scheduler. New profiles will have to be created.

### Backups (Non-Cloud users only)

- Determine where your backups will be stored and make a backup file.

### Other Important Changes

- Patient Groups have changed to classifications, ensure you can view/change classification entries if needed. Understand how this impacts your organization.
- There is no longer a 'specialized code library'; if you used this feature in Advanced, ensure you can assign library entries to billing/payer/rate code categories.
- Claim Templates do not store dollar amounts. This information is pulled from the procedure code library. Make sure the libraries are properly configured for proper claim creation.
- The Premier Authorization library does not include a product code field.

### Unique Business Processes

- Ensure the program can meet all your mission critical billing needs.

### Make the Switch - Go Live!

Ready to make the switch to Premier? Contact EZClaim at 877-650-0904 to schedule your go live date. At the scheduled time, we will take a copy of your existing Advanced data and migrate it to Premier. From that point forward, all data entry and claim submission will be done in Premier.

### Signature

I have reviewed each of the critical processes and feature changes above and understand there may be others not documented. I realize it is my responsibility to ensure that my business requirements have been met by EZClaim Premier before authorizing a live data conversion to Premier.

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_