

CHR Project Organization Checklist of Prerequisites

Organization Name:	
What To Do	X = Complete
CONTRACTING <ul style="list-style-type: none"> ▪ Complete, sign and return a CliniSync Participation Agreement to CliniSync. ▪ Receive an executed CliniSync Participation Agreement from CliniSync. 	
ONBOARDING <ul style="list-style-type: none"> ▪ Watch a recording of the onboarding series. ▪ Review onboarding packet materials. ▪ Discuss project with staff to include CliniSync consent in NPP, system security and permitted usage. 	
RESOURCE ASSIGNMENT <ul style="list-style-type: none"> ▪ Assign a resource from your organization; a staff member who can participate in training and act as the point person to include receiving notification of upgrades and downtimes. 	
CONSENT/NPP DISCLOSURE <ul style="list-style-type: none"> ▪ Participation in CliniSync has been incorporated into your Notice of Privacy Practices to include information on how a patient may opt out. ▪ Communicate to CliniSync how your organization will manage opt out patients. ▪ Your updated NPP including language about CliniSync participation has been submitted to CliniSync. ▪ If customized patient brochure is desired, submitted logo to CliniSync. 	
ORGANIZATION / USER BUILD <ul style="list-style-type: none"> ▪ Complete and submit the CHR User Build Form to CliniSync. 	
<p>To review, prerequisites include the following:</p> <ul style="list-style-type: none"> ✓ Completed CHR User Build Form ✓ Your updated NPP ✓ Your decision on management of Opt Out patients <p>All prerequisites materials should be submitted to your CliniSync contact.</p> <p>Once all prerequisites have been received, your project will be packaged and placed in queue. A CliniSync representative will contact the Site Administrator and/or CHR Lead via email when we are ready to schedule your organization's training and go-live.</p>	