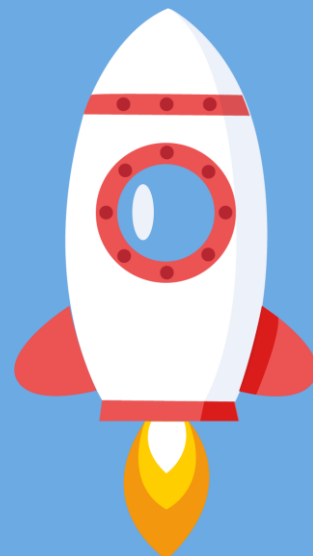


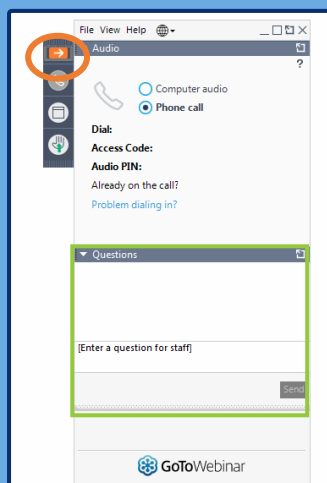
Mission 6.2021.1

Your Journey to New Enhancements

Executive Pre-Mission Briefing



Welcome! Command Center Controls



Audio Options:

This is a listen-only presentation

Audio by Phone

- Select "Use Telephone"
- Dial the provided number
 - Follow voice prompts
- You will need to use the **Access Code and Audio Pin**
- The Code and Pin are unique to each attendee

Minimizing your Meeting Controls:

- Meeting controls will minimize automatically
- To open & close controls, use the **Orange** arrow button

Asking Questions:

- Questions can be asked using the **Questions Panel** on the Meeting Controls
- We will attempt to answer all questions at the end of the session





PXP Patient Portal - EXCITING ENHANCEMENTS!

Automated, Streamlined Enrollment

No more tokens! Invited to fully enrolled in under 2 minutes.

Patient Initiated Changes

Request demographic or history changes. Review before import.

Practice Administrative Portal

Easily assist patients with access and track portal usage.

Full Integration

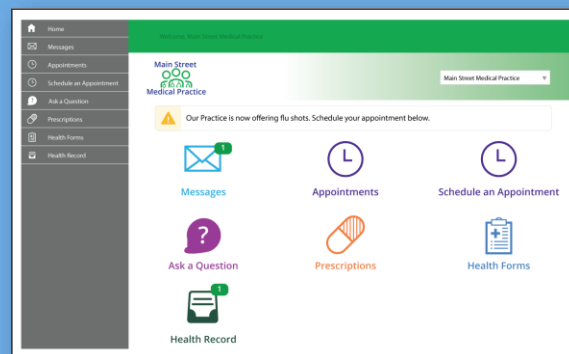
Messaging, Forms, Appointment Requests, Refill Requests and more.

Customized and Easy to Use

Custom practice theming, any device, clear design, accessible.

Step by Step Guidance

Dedicated PXP Portal Conversion Specialist to make sure your conversion is smooth.



Patient Statements – ALL NEW FEATURES!

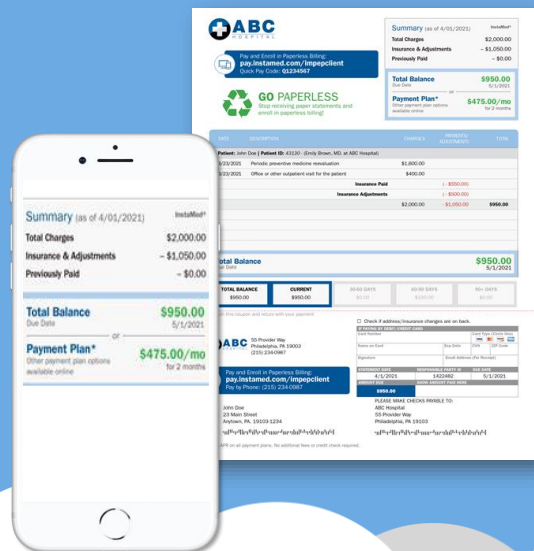
Customizable statements including logo, colors, and messaging and advanced heat mapping.

Electronic statements available via **text message, email or both**. There is no additional fee for using text and email simultaneously.

Easy e-statement enrollment using QR Code or web address.

Patients can seamlessly link directly from electronic statement to electronic payment method.*

*Digital wallet, automatic recurring payments, guest payment, Apple Pay and Google Pay support.



MISSION BRIEFING AGENDA

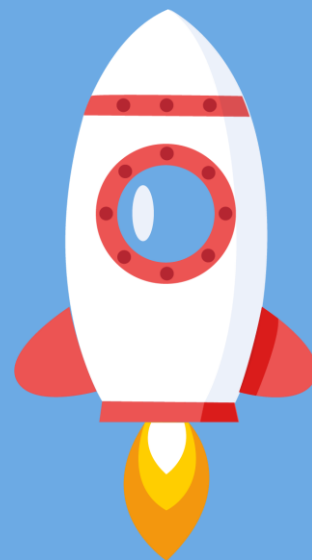
- **Approach**
 - “Flight Plan” Overview
 - Selecting a Launch (Go-Live) Date
- **Roles Overview**
 - Executive Sponsor
 - Client Core Mission Team
 - TSI Healthcare Upgrade Specialists
- **Next Steps**



Mission 6.2021.1

Your Journey to New Enhancements

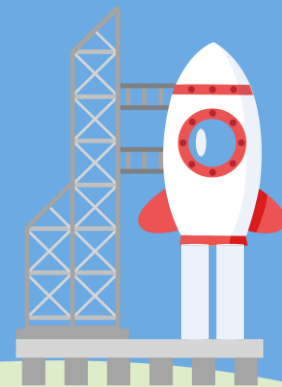
Approach



Why A “Launch Mission” Theme?

Perfect Analogy For The Unique Nature of This Upgrade:

- NextGen’s Financial Investment
 - \$350 MILLION in developments and upgrades
- Complexity of Upgrade
- Critical Timeline Considerations



OUR COMMITMENT TO YOUR MISSION SUCCESS:

- Dedicated Upgrade Mission Specialists
- Live and recorded webinars
- Workflow education and training
- Online resource center featuring a step-by-step flight plan

6.2021.1 Flight Plan Background

This mission requires **more upfront planning and coordination** than previous flights.

Multiple Products in a single upgrade:

- In addition to EPM and EHR enhancements there is a new Patient Experience Portal (PXP Portal).
- Upgrade will impact those three major applications and involves 5+ teams behind the scenes at TSI Healthcare/NextGen

Shifting from task-based approach (focused on each step individually) to project-based approach (focused on timeline in totality).

Planning ahead and committing to Launch (Go-Live) dates.

6.2021.1 Flight Plan

ETA to Launch = Approximately 16 weeks



PLAN

Outlining our journey

- Executive Sponsor Kick-Off call
- Confirm PXP Portal License & Patient Statements Conversion Paperwork
- Create Core Mission team & Complete TSI Overwrite Agreement
- Confirm Hardware Specifications*
- Review Enhancements Overview Document & Submit Setup Form

*Transition to new servers



DISCOVER

Analyzing mission details specific for your practice

- Determine launch (go-live) date
- Breakout call with Core Team and TSI Upgrade Specialist
- Attend PXP Portal Webinar



CONFIGURE/TEST

Avoiding disaster - Test, test, then test some more

- Testing and review of current and future workflow (submit customization request)
- Submit complete testing checklist
- Review checklist (including customizations)



PREPARE

Training Camp for remaining practice crew

- Complete end-user training and communication
- Final "all systems go" check-in.
- Confirm launch date (go-live) is on schedule
- Review upgrade weekend processes



LAUNCH

Blast Off!

- Execute plan for go-live weekend
- Post-upgrade check-in

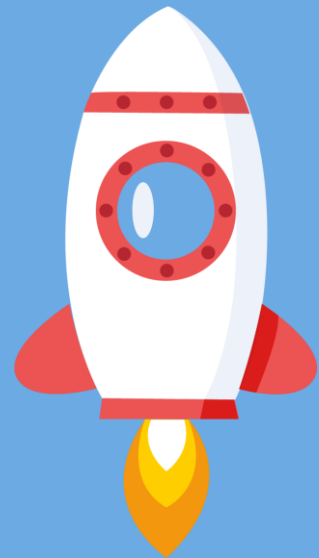
Mission 6.2021.1

Your Journey to New Enhancements



PLAN

Outlining our journey



Selecting Launch (Go-Live) Date



PLAN

Outlining our journey

Due to the complex nature of this mission, Launch (go-live) date selection and achievement is **CRITICAL**

- Keeping your team/practice on schedule with tasks and holding them accountable to flight preparation deadlines is **CRUCIAL**.
- Think of this as selecting a launch date for a space mission: if you miss the launch (go-live) window, you will have select a new date much further out and may need to redo certain tasks.
- This ensures the necessary resources are available for your success throughout the process and at launch/go-live.



Launch (Go-Live) Date Considerations



PLAN
Outlining our journey



Number of practices



Number of providers



Specialty content and/or customizations

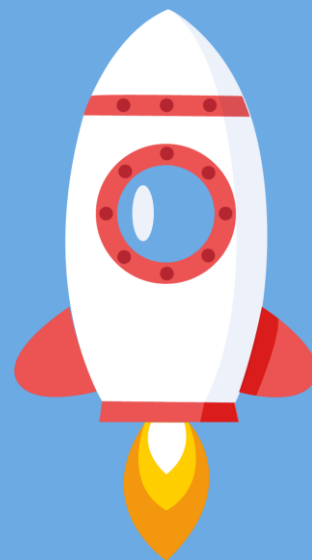


Utilization of current patient portal

Mission 6.2021.1

Your Journey to New Enhancements

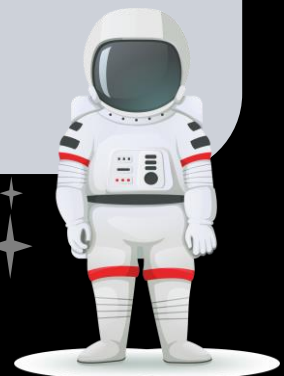
Roles Overview





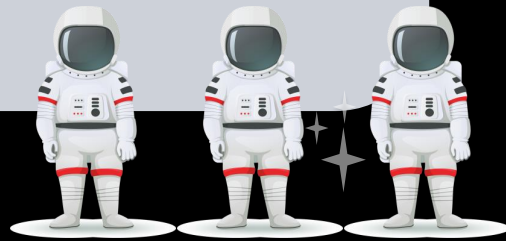
Executive Sponsor Role:

- **Choosing A Core Mission Team:**
 - Identify mission team members that have a good understanding of your current workflows by department:
 - EPM, EHR, PXP Portal
- **Holding Core Mission Team Accountable for Deadlines:**
 - Meet weekly to compare their progress against our flight plan



Core Mission Team Role:

- **Client/Practice Specialists in three key roles:**
 - EHR, EPM, PXP Portal
- **As with any interstellar launch, preparation, testing (and more testing) is key!**
- **Mission Core Team members *must*:**
 - Attend scheduled calls/trainings
 - Dedicate time to Test and Review
 - Keep the practice informed, establish training plans, train internal staff, and **keeping the practice on track with critical deadlines**
 - Coordinate with other members of the Core Team
 - Avoid Silos - decisions on one side impact all others



Upgrade Specialist Role:

- TSI Healthcare Specialists in three key roles:
 - EHR, PM, Portal
- Assigned once Set-Up Form is submitted by practice
- Conduct checkpoint calls at various stages of the mission.



6.2021.1 Flight Plan

ETA to Launch = Approximately 16 weeks



PLAN

Outlining our journey

- Executive Sponsor Kick-Off call
- **NEXT:** Confirm PXP Portal License & Patient Statement Conversion Paperwork
- Create Core Mission team & Complete TSI Overwrite Agreement
- Confirm Hardware Specifications*
- Review Enhancements Overview Document & Submit Setup Form

*Transition to new servers



DISCOVER

Analyzing mission details specific for your practice

- Determine launch (go-live) date
- Breakout call with Core Team and TSI Upgrade Specialist
- Attend PXP Portal Webinar



CONFIGURE/TEST

Avoiding disaster - Test, test, then test some more

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LAUNCH

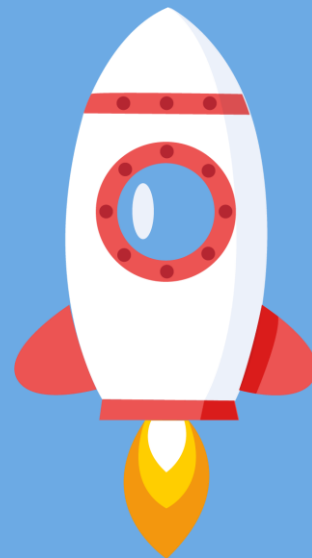
Blast Off!

- Execute plan for go-live weekend
- Post-upgrade check-in

Mission 6.2021.1

Your Journey to New Enhancements

Next Steps



Next Steps Overview

1. Meet with Your Account Manager: Open case with helpdesk@tsihealthcare.com to request upgrade and complete paperwork for Portal license & Patient Statement conversion
2. Create Core Mission Team
3. Complete TSI Overwrite Agreement
 - TSI will initiate Confirmation of Hardware Requirements (transition to new servers if applicable)
4. Share your 6.2021.1 Flight Plan with your entire team!



Flight Plan

Step 1: Meet with Account Manager

- Open case with helpdesk@tsihealthcare.com to request upgrade and complete paperwork for Portal license & Patient Statement conversion.
- **Topics Covered During the Meeting:**
 - **Portal License Conversion:** Your account manager will work with you to review existing legacy Portal licenses and ensure the correct number of PXP Portal license are ordered.
 - **Patient Statement Conversion:** Your account manager will review your existing statement subscription (if applicable) to ensure conversion to new statements is successful.

Mission 6.2021.1

Your Journey to New Enhancements

Thank You

