



Azalea Health - LeonardoMD Data Migration Resource Guide

Data Migration Details

The following information will be migrated over to Azalea at no charge. Parenthesis indicate the corresponding area of the Azalea platform to where data will live following migration.

- **Client Specific Information**
 - Locations
 - Providers
 - Fee Schedules
 - Appointment Reasons
 - Schedules *
 - Resources *
 - Insurances <Insurance Company -> Plan> (Insurance list)
 - Interfaces (per interface basis) *
 - Charge Slips (facesheet)*
 - Non Patient Data (main documents)*

- **Patient Specific Information**
 - Patient Insurances
 - Patient Documents / Images / Scans
 - Patient Edit Live Chart Documents and Attachments*
 - Patient Past appointments *
 - Patient Future appointments *
 - Patient Messages (tasks)
 - Patient Alerts (pop up notes)
 - Patient Notes (comments)
 - Patient Account Notes (comments)
 - Patient Problem History

**if applicable*

Please note that this information is currently what is included for FREE. If additional data is requested, we will look into the scope of development but can not guarantee it will be possible.

Data Migration Process

Below is a summary of the data migration process.

- Signed Contract
- Pre-implementation
- Initiate Azalea site setup
- Client Specific Information requested and loaded (locations, providers, fee schedules, appointment reasons)
- Assigned Implementation Specialist
- Implementation: Planning and Training Coordination
- Discovery (to review account information, determine team expectations, and review process)
- Goal Go live established
- Training
- Prior to go live full data migration (see above)
- Go live on Azalea
- Continue to work out of LMD for 60-90 days (will be discussed in more detail)
- Read only access to LMD (will be discussed in more detail)

Transferring Patient Balances

Azalea recommends working patient and insurance balances from LMD for 60-90 days. At the point you want to move over patient balances, LMD can provide Azalea with an export with the following or you may choose to transfer any remaining open patient balances with the following information:

- Patient full name
- Patient DOB
- Patient address
- Patient phone number
- Guarantor address
- Previous balance from old system.

Azalea recommends using a custom code (ex: PREVIOUS BALANCE) when entering the patient balances from another PM system. It has been our experience that balances less than \$50 and older than a year old will likely not be paid. Therefore, Azalea recommends starting out by keying in balances over \$50 and within the past year before entering the smaller/older balances.

To manually key in the balance you must first create the custom code in the Settings → Billing → Custom Codes. After creating the custom code you need to add it to the fee schedule with a \$0.00 fee in the Settings → Billing → Fee Schedule. Now that you have the custom code simply add that to any patient encounter. If a patient encounter does not exist, you can create a new one Encounters → New Encounter → Enter Custom Code. You will need to modify the unit amount of this custom code within the encounter by clicking the pencil button on the right-hand side of the screen and add the patient balance that was in the old PM system. Once you have added the PREVIOUS BALANCE custom CPT and changed the unit amount to whatever their balance was in the old PM system just change the encounter status to billed and you are finished.

Also, we recommend you scan the previous system's patient statement or ledger summary into the patient documents for ease of access. You can do this by going to the Patient list → Search Patient → Click on Documents → Scan or Upload.

**Please keep in mind we will review this process during training*

Transferring Insurance Balances

We recommend to keep working insurance balances for at least 60- 90 days in LMD. At this point, you will want to run an AR summary and decide to work an additional days. Then you will either transfer over certain insurance balances or adjust them off in LMD as uncollectable.

Transferring insurance balances into Azalea requires the following:

- Encounter be created in Azaela
- Diagnosis codes from original encounter
- Original charges
- All payments and adjustments for the charges from the previous system

The idea is to replicate the encounter from your previous system into Azalea because the claims you generate in our system, for insurance A/R follow-up, will need to contain the same information your original claim did.

Keep in mind, insurance aging in Azalea is based on initial claim date. Therefore, your insurance aging will seem like it resets because these new encounters in Azalea will not have an initial claim date.

**Please keep in mind we will review this process during training*