# ShareNote Community

IMPLEMENTATION CHECKLIST

Welcome to ShareNote Community! We're excited that you have chosen to partner with us to optimize and streamline your daily work. During the implementation process we will be walking through this list with you.

## Before You Begin

As you get started, there are some best practices to make sure that you are using ShareNote Community to its fullest.

- Use Google Chrome as your browser.
- Clear your cookies.
- Know which MCO/Insurance you are credentialed with and services you are approved to render.
- Organize an Implementation Team within your organization, and provide your implementation specialist with the contact information of the team lead.

## Step 1 - Verify Services & Add Locations

Refer to your fee schedule when setting up this page. The information you provide below will pull into your Billing Setup. Please ensure that the Services that you are credentialed to render are listed and active.

- Add Locations - You are able to utilize several locations inside your agency. These locations could be physical sites, such as another building or address, or they could be representative of departments in your agency, such as Intake or Discharge.
- Verify Services (CPT and HCPCS Codes) and add missing Services - If a Service you are credentialed to render is missing from the list, please add it.
- Export your Active Services and save as an Excel document. This will be sent to the Billing Department in Step 2.

## Step 2 - Set Up Billing

There are a number of steps to complete to set up your Billing Profile. If you plan to use Payspan or Availity, set these accounts up first.

- Set up Payspan Remittance - Disregard if you are not using Payspan.
- Set up Availity Remittance - Disregard if you are not using Availity.

Step 2 continued on next page....

- Complete Billing Template - Once complete, send to claims@sharenote.com. Please note that a billing template is required for each location that is created in the "Manage Location" section.
    - Download Billing Template.
    - Enter information such as your organization's NPI, Credentials, Payers Setup, Service Codes, etc.
    - If using Payspan or Availity, add the credentials you created for those accounts.
    - Enter Services - All CPT and HCPCS Codes that represent the services that will be rendered.

*RCM Participants only - If you are utilizing our RCM Services (offered at an additional charge), be sure to complete the bottom portion of the billing template.

## Step 3 - Organizational Settings

Set up the following details for your Organization's Billing Preferences:

- Company Details - Ensure your Organization's zip code is the full nine-digit Zip code.
    - Example: 54455-6789
    - Find your USPS Full Zip Code.
- Set up your Referral Companies.
- Set up your Referring Providers.

## Step 4 - Add Staff Members

Create your Staff Member's Profile in your ShareNote Community account.

- Add staff members manually OR Import staff members

Once the Staff profile is created, at a minimum, you will want to ensure the following is set up:

- Staff Details & Demographics - Assign any appropriate additional User Settings.
- Locations Tab - Do NOT assign a location to Administrative Staff.
- Caseload Tab - Do NOT assign a caseload to Administrative Staff.
- Services Tab - Only select the services that the Staff are educated to render.
- Position Tab - Staff position and credentials will print on Notes and Assessments.
- Billing Profile Tab - Enter Rendering NPI and Taxonomy, OR complete required fields for unlicensed Staff. Be sure to add individual rendering NPI not the company's NPI.
- Notification Settings Tab.

Repeat this for each Staff Member.

# Step 5 - Add Clients

Add your Clients into ShareNote Community. Once the Client is created, at a minimum, you will want to ensure the following is set up:

- Add Client's manually OR import them.
- Client Demographics - For billing purposes, ensure that all Client information such as demographics, home address, phone number, etc. are entered exactly as they appear with Insurance. For example, if the insurance company has "Drive" spelt out in their home address, do not abbreviate it to "Dr.". Any inconsistencies will result in your claims being rejected.
- Funding Source - All funding sources should be updated.
- Authorizations - To ensure Services do not extend past the authorized units, select Enforce Validation and enter Authorization ID, Frequency Cap, and Set Alerts.
- Client Goals
- Group Goals
- Diagnosis/Problem
- Services
- Caseload - Assign Clients to caseload, or Assign Staff to a caseload.

Repeat this for each Client.