SOP
Notification of Server and EHR Migrations for Sales

Department:
Sales and Client Services

Summary:
Effective February 15, 2022, migrations will have an associated fee. This includes:

1) All server migrations
2) Any EHR migration – migrating platforms, migrating to a new EHR

Definitions/Acronyms:
CS: Client Services
TP: Target Process. The system Medisolv uses to manage tickets for all internal and external requests.
EHR: Electronic Health Record. The software that an organization uses to digitally capture a patient's records.
Platform: The version of EHR software that a hospital or practice is using. For example: Meditech Magic versus Meditech Expanse.
Server: The hardware used by a hospital to support Medisolv applications.
Procedures:

1) Once a Medisolv Associate (Client Services) receives notice that a client is planning an EHR or server migration, they must:
    a. Inform the client that there is a migration fee and sales will be in touch to discuss.
    b. Enter a TP to notify engineering and tag the BI Solutions Consultant
    c. Tag Client Services leadership representative(s) in that TP.
2) The BI Solutions Consultant submits a Client Migration Submission Form (see links section below). The Consultant completes the form, including the items below:
    a. Their email address for questions
    b. The name(s) and CCN(s) of the migrating organizations
    c. The products impacted by migration
    d. The type of migration – Server vs EHR
    e. Notes about the type of migration including what the organization currently has as an EHR or Server and what they are moving to.
    f. Date of Migration – estimated if not known
    g. Organization Point of Contact (POC) name and email
3) Form submissions are sent to the entire Sales team and the EVP of Client Services.
4) After Sales receives a request form:

a. The appropriate sales representative (according to the territory designation) will review the form and communicate directly with the organization POC.
b. The sales rep will draft an addendum to the master agreement and email that to the organization POC.
c. After the sales rep has received a signature, they will execute the closed won procedures according to the Closed Won SOP.

5) Migration work **does not** begin until the sales hand-off is received.

Conditions:
1) To submit the TP, the CS Medisolv Associate must have documented migration notice from the client (email is sufficient) and include this documentation in the TP.
2) To submit the form, the BI Solutions Consultant and CS Leadership Representative must be tagged in TP and have access to the documentation from client.

Document Links:
Migration Submission Form (Hubspot): https://share.hsforms.com/1xQVY5qjLTP-bBznqfZcLPwaj8c
Target Process (TP): https://medisolv.tpondemand.com/

Key Players:
- Medisolv Client Services Leadership Team
  - ENCOR-eh and ENCOR-ec: Kristen Beatson, kbeatson@medisolv.com
  - ENCOR-a/Value Maximizer/Rapid/Opal: Stephen Manna, smanna@medisolv.com
- BI Solutions Consultant: Kurtis Grove, kgrove@medisolv.com
- EVP of Client Services: Ken McCormick, kmccormick@medisolv.com
- Sales Team Members (sales@medisolv.com)
  - Chief Growth Officer: Bryan Hoke, bhoke@medisolv.com
  - Sales Team Leader (Interim): Erin Heilman, eheilman@medisolv.com
  - Sales Representative: Todd Lewis, tlewis@medisolv.com
  - Sales Representative: Sarah Schulz, sschulz@medisolv.com