# Implementation Overview

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**WELCOME TO DRCHRONO BY EVERHEALTH | IMPLEMENTATION OVERVIEW | ⏰ 15-MINUTE READ**

All new DrChrono by EverHealth customers are supported through our implementation program with a structured, dedicated engagement designed to get your practice live and confident on DrChrono as quickly as possible. Three weeks from kickoff is our fastest path to go-live, though your actual go-live date depends on your practice's readiness — including payer enrollments, staff availability, and how quickly you set up and configure your account.

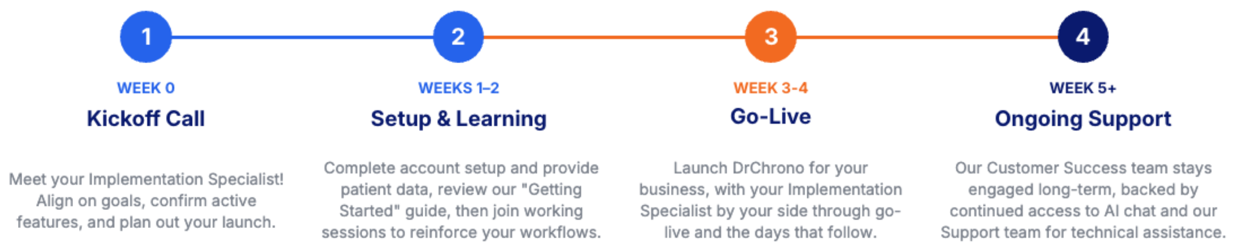
## Implementation Stakeholders

Your practice will be supported by a dedicated team throughout the engagement.

| Role | Responsibilities |
|---|---|
| **Implementation Specialist (IS)** | Your primary point of contact throughout the project. Manages the overall timeline, coordinates tasks, leads working sessions with your team, monitors progress, and ensures a successful go-live. |
| **Billing Consultant (BC)** | Works alongside the Implementation Specialist for billing and RCM implementations to ensure best practices within DrChrono, including claims, A/R management, statements, and reporting. |
| **Your Main Contact (Customer Team)** | Your organization's designated point of contact during implementation. Responsible for ensuring all users complete their pertinent digital learning and attend their scheduled working sessions, ensuring the account is set up to meet the practice's needs, and patient data is provided for import (if applicable). |

## Implementation Timeline

**Your implementation follows a structured, IS-led engagement built around your plan** every practice follows the same core path to go-live, with additional sessions layered on for billing, RCM, payments, or data migration — running in parallel, not delaying your launch. Three weeks from kickoff is our fastest path to go-live; your actual date depends on your practice's readiness, and how long you remain in active implementation afterward depends on which services are part of your plan.




## Your Timeline in Detail

| Week | DrChrono by EverHealth Team | Customer |
|---|---|---|

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|---|---|---|
| Week 0 | • Kickoff Call (1 hour): Meet your IS, set your go-live date, plan next steps | • Complete Intake Form before Kickoff Call<br>• Attend Kickoff Call<br>• Begin reviewing learning materials **(all users)**<br>• Begin setting up your account |
| Week 1 | • Configuration Working Session (30 min)<br>• Front Desk Working Session (30 min)<br>• ^Enrollments Working Session (30 min) | • *Provide basic patient data for Initial Import (demographics, C-CDA, sample appointments file)<br>• Continue reviewing learning materials **(all users)**<br>• Continue setting up your account<br>• Attend role-based working sessions<br>• ^Initiate payer enrollments |
| Week 2 | • Clinical Staff Working Session (30 min)<br>• Provider Working Session (45 min) | • Attend role-based working sessions<br>• Ensure all users have reviewed learning materials<br>• Continue account configuration (as needed) |
| Week 3 | • Pre-go-live check-in (30 min) - if going live this week<br>• ^Billing Working Session (45 min)<br>• ^RCM Working Session (45 min)<br>• Practice Manager Working Session | • Attend role-based working sessions<br>• *Provide basic patient data for Pre-Go-Live Import (demographics, C-CDA, appointments) by 12:00 PM EST day before go-live day<br>• 🎉**Go-Live** (earliest) |
| Week 4 | • First post-go-live check-in (45 min) | • *Provide documents/images/clinical notes (or EHI export) files for upload (<u>only after go-live</u>) |
| Weeks 5–8+ | • ^Post-Go-Live Billing or RCM Working Session (30-45 min)<br>• *Data Import Completed (within 4–8 weeks of file receipt)<br>• Finish Implementation + Transition to Customer Support & Customer Success 🎉 | • ^Attend Billing or RCM Working Session<br>• Transition to Customer Support & Customer Success |

*^RCM and Billing customers only*
** Data migration customers only*

# Training & Learning Resources

DrChrono pairs self-paced, role-based digital learning with live working sessions led by your Implementation Specialist — so your team learns the basics on their own schedule, then uses time with your IS to optimize workflows specific to your practice. Your learning path and working sessions are scoped to your plan features based on notes from your Account Executive and your Kickoff Call.

📖**Role-Based Learning Guides**
Before each working session, you'll work through self-paced guides built around your specific role, so you can learn the basics on your own schedule with minimal disruption to clinic hours.

**Live Working Sessions**
Organized by role, these sessions with your Implementation Specialist build on what you've already learned to optimize your workflows — they're not a repeat of the basics.

**24/7 AI Chat Support**
Available directly in the DrChrono application around the clock, so most routine setup and workflow questions can be answered instantly, without waiting on a callback, email reply, or the next scheduled session.

### How Much Time to Expect:

Your total time investment depends on your plan. Across your implementation, expect:

**Self-Paced Learning:** 1–2 hours per user — reviewed by all users within the first week (before each working session).
***Setup:** 2–4 hours (3–5 hours for Billing & RCM plans) — account configuration and administrative tasks.
**Live Working Sessions:** 4–5 hours (6–7 hours for Billing & RCM plans) — scheduled time with your Implementation Specialist.

** Additional time is required for creating custom clinical forms or intake forms.*

## Data Migration

Data migration is delivered in stages so your team can start working in DrChrono early, with documents migrating after go-live. More details about data migration scope, timeline and a step-by-step process can be found in our **Data Migration Overview** page.

## Interface Setup

Third-party interface timelines vary by vendor and may not be set up by go-live date. We strongly recommend partnering with your representative(s) for these third party vendors to facilitate a quicker and smoother transition. Below are typical setup windows:

| Vendor | Typical Setup Time |
|---|---|
| Quest Diagnostics | Up to 3 weeks |
| Labcorp | Up to 6 weeks *(coordinating with your Labcorp rep early can significantly reduce this)* |
| Immunization Registries (via Ironbridge) | Varies — a few days to several weeks; contact your registry for details |

## Hours of Operation

| DrChrono by EverHealth Implementation Team | DrChrono Support |
|---|---|

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| --- | --- |
| **Hours:** Monday – Friday, 8:00 AM – 5:00 PM EST<br><br>*Your assigned Implementation Specialist's name and contact information will be included in your kickoff email.* | **24/7** AI-powered Chat Assistant (in-app)<br><br>**Live Phone Support:** Monday – Friday, 8:30 AM – 5:00 PM EST<br><br>**Knowledge Base:** support.drchrono.com |

# Frequently Asked Questions

**How long does data migration take?**

Migration is delivered in stages to support an earlier go-live. Initial demographics and C-CDA are imported in the first week. A pre-go-live batch is imported the day before go-live. For documents / images / clinical notes imports, provide data immediately after go-live; import is typically completed within 4–8 weeks of receipt. Importing all data before go-live is possible but will delay your go-live by up to 4–8 weeks. More information can be found on our Data Migration Overview page here.

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**How soon can I go live with DrChrono?**

Three (3) weeks from kickoff is the fastest path, and many practices hit that mark — but your go-live date is ultimately based on when your practice is ready. Payer contracting, staffing, and how quickly your team completes setup tasks all factor in, so it's common for practices to need more time. Let your IS know where things stand so we can build a realistic timeline together.

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**Does go-live mean my implementation is finished?**

Not quite — go-live is when you start using DrChrono day-to-day, but your implementation officially wraps up a bit later depending on your plan. Measured from the kickoff date: around week 5 if only using the EHR features, week 6 if you are on a billing or RCM plan (once your first ERA/remittance is confirmed), or around week 8 if you have a document import included. Go-live itself occurs around week 3 at the earliest, regardless of plan.

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**Do I need to start implementation immediately after signing up?**

We strongly recommend starting as soon as possible to get maximum value from your implementation window. Delayed starts are generally honored up to 1 month, unless special terms apply. Note that software fees are invoiced upon signing and continue per your agreement terms regardless of implementation start date.

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**Can I pause my implementation?**

Brief pauses of up to 2 weeks are accommodated. Longer pauses can reduce momentum and diminish the effectiveness of training, as learnings are best reinforced through active use.

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**What if an external factor delays my implementation (e.g., licensing, credentialing, construction, hiring, etc.)?**

We understand delays happen and will do our best to accommodate. We'll work with you to determine if there's anything we can advance in the meantime. Note that recurring software and service fees continue per your agreement terms during delay periods.

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**What happens if a new user joins our team during implementation?**

New users should review the resources in our Getting Started learning center to understand the basics of DrChrono. Live working sessions are structured, group-based sessions and generally aren't repeated for individual new hires during the implementation engagement.

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**Should I expect every user to be fully proficient on DrChrono when we go live?**

Not on day one — and that is completely normal. Becoming proficient with any new software or tool takes time and real-world repetition. Working sessions are designed as group sessions by role and function to reinforce the content your team reviews ahead of go-live, but true confidence builds through daily use. It is perfectly normal for users to still be finding their way around on go-live day, and it is acceptable to expect best practices to continue developing in the weeks that follow.

This is exactly why DrChrono includes a 24/7 AI-powered chat assistant built directly into the application — so your team always has support in the moments they need it, whether it is go-live day or three months later. The DrChrono knowledge base is also available to support continued learning at every stage.

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**Who is responsible for account setup?**

Account setup is the customer's responsibility. DrChrono provides knowledge base guides covering account setup, clinical and intake form building, and billing enrollments. Your IS and the 24/7 chat assistant are also available to provide guidance throughout.

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**Can clinical or intake forms be migrated from my current EHR?**

No. Forms cannot be migrated from another EHR. Stock forms are provided and can be modified to meet your needs. Knowledge base guides on form building are available, and customers will receive a form-building working session during implementation if needed.

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**Do you offer onsite implementation services?**

Yes, onsite engagements are available (additional per-day fees plus travel expenses apply). We require a minimum 2-day commitment for onsite work. That said, our remote implementation services are highly effective, and the majority of customers complete implementation entirely remotely.

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**Do you provide credentialing services?**

DrChrono by EverHealth does not provide credentialing services.

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**Can you accommodate unique or custom workflows?**

For specific or highly customized workflows, we recommend discussing this with your Account Executive prior to signing up. We want to ensure DrChrono can meet your needs before you commit.