

Checklist for Transition

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About

There are two transition checklists that should be followed when transitioning to the Cloud. The checklists are split based on what to do before the Discovery Call with Office Practicum's Client Advocate team, and what to do after the Discovery Call.

Before the Discovery Call

Before contacting a member of the Office Practicum Client Advocate team, it is recommended you check the following:

- Confirm you meet the [hardware requirements](#) and [network requirements](#). Record your system specs.
- Verify your upload and download connection speeds with this [speed test](#). Perform the test three times and record the average.
 - Obtain the following information to the best of your ability:
 - List the interfaces you currently have along with the vendor for each interface (such as Labs, HIEs, PM, Imm Reg, etc.)
 - Indicate if you integrate with any third-party services (like Solution Reach). List the services.
 - Obtain Clearinghouse information. Due to the unique nature of the Cloud, it is strongly recommended that fully integrated clearinghouses be used. See [Choosing a Clearinghouse](#).
 - Determine how many workstations you want to designate as scanning workstations.
- Contact the Office Practicum Client Advocate team for an initial Discovery call.

The discovery call will be used to review the items listed above. The Client Advocate team will determine if you qualify for the Cloud.

After the Discovery Call

- The Client Advocate team will provide you with a C/S to Cloud Migration - IT form that will be provided by the Client Advocate team. Complete this form.
- Schedule a call with OP/Practice IT to review the IT form and answer any technical questions you may have. This will also begin the setup of the sandbox cloud environment.
- After the call is complete, your IT group should complete the OP sandbox on any remaining machines:
 - [OP Cloud Installation on a Workstation](#)
 - [iPad Installation Instructions](#)
 - [Cloud Installation on Mac OSX](#)
- Test the cloud functionality in a sandbox environment. Test your scanning, printing, etc.

Schedule a conversion date.

Verify who owns and manages your domain (aka GoDaddy, IT firm). The domain provider should be creating a redirection for the new portal page within this domain management account through the DNS console so all traffic points to the cloud portal page.

Verify if you have a separate practice website. Determine who has access to edit the portal links on your website. The website should point the portal links to the new portal URL.
