

Standard Implementation Plan

Services Provided, Initial System Setup

SQL database setup, including the following items for business lines outlined in the order form:

- Business Unit(s) for configuration and patient locations
- ZZTest Business Unit(s) for training of business lines
- Sample User Group and Privilege Group configuration
- Integration configurations

Training, System Setup, and Project Management

The standard remote (unless an alternative method is agreed to) train-the-trainer onboarding model requires Power Users to complete self-study eLearning content and join live instructor-led group training sessions to gain a baseline understanding of the MatrixCare Application. Upon gaining a base knowledge of the application, our consulting team will work remotely with your Power User team to address questions and provide support and individualized process guidance based on best practice workflows.

If purchased, you can take advantage of two additional offerings to enhance your training experience with Company, both of which can be delivered remotely or onsite: Individualized Power User Training, which includes personalized sessions for your team, and Assisted Train the End User (TEU), a service provided by Company consultants to support training for your End Users.

MatrixCare Community Learning Tracs

Unlimited access to our self-service Community eLearning role and workflow-based content. The Client agrees to complete the required self-service Community curriculum before the commencement of the group online training sessions and individualized process and workflow consulting sessions. The Power User is accountable for completing the Power User e-learning content in order to acquire the ability to enter support cases.

Training and Consulting Program

Group online training sessions with a focus on functional usage of the Clinical Mobile, Clinical Office, and Financial Software features.

Individualized consulting to accommodate best-practice configuration and workflow. The sessions will result in a baseline understanding of software functionality and configurations.

Company implementation consultants will:

- Provide configuration recommendations and oversight of the solution.
- Provide recommendations for workflow, processes, controls, and outputs.
- Manages and troubleshoots implementation issues for solutions for which they are responsible.
- Follows established implementation standards.

Billing System Setup and Configuration

The Client will collaborate with Company, which will provide education and guidance, to complete configuration and data entry for payors, service codes, revenue codes, procedure codes, and contractual rules related to payors of the current active census (including Medicare, Medicaid, Advantage Plans, Self-Pay, and Private Insurer).

Project Management

The Company Project Manager, along with the Client Project Manager, is responsible for managing the daily tasks of the project and ensuring high-quality execution on time. They are responsible for coordination of Client communications, project planning, execution, and coordinating all tasks and deliverables throughout the project life cycle. The key functions of the Project Manager are outlined below:

- Manage All Project Activities and Events
- Manage Resource Allocation of All MatrixCare Resources
- Deliver/Maintain Project Planning Tools
- Ensure Implementation adheres to MatrixCare Standards
- Ensure MatrixCare Tasks are Completed on Time
- Schedule and coordinate all events in coordination with the Project Team
- Provide Executive reporting
- Risk Identification/Mitigation
- Issue Log Management
- Escalation Management

Roles and Responsibilities

Project Phase	Client Responsibility	MatrixCare Responsibility
Discovery	<ul style="list-style-type: none"> Identify Resources for Key Project Roles, focusing on operational areas, end-user training ability, and change management skills. Complete/Return Client Discovery documents. Agreement on recommended SQL database setup. 	<ul style="list-style-type: none"> Define the Client SQL database set up for all locations and business lines outlined under this order form. Define initial Billing System Setup and Configuration
Configuration	<ul style="list-style-type: none"> Provide configuration clarification as needed. Review Organization, Physician, Supplies, and Employee imported data. Billing configuration 	<ul style="list-style-type: none"> Complete Client SQL database set up for all locations, business lines, and training business units outlined under this order form. Complete initial billing configuration. Complete Organization, Physician, Supplies, and Employee for imports for all partners Provide education and guidance for billing configuration
.csv Imports	<ul style="list-style-type: none"> Complete/Return Physician, Organization, Supply, Employee, and Patient demographic import information in the required validated format. Review imported items for accuracy. Manually enter any data not imported or additional items not included in imports. 	<ul style="list-style-type: none"> Complete imports of Client-returned Physician, Organization, Supply, Employee, and Patient demographics.
Power User Training	<ul style="list-style-type: none"> Create User Accounts/Assign privileges. Completion of self-service eLearning curriculum. Consistent attendance and active participation in interactive group training sessions. Consistent attendance and active participation in the individualized process and future state workflow sessions. Identify/document Client policy and process change considerations. Complete all assigned post-session activities in alignment with the project schedule. 	<ul style="list-style-type: none"> Provide interactive group training sessions. Provide consulting via individualized sessions guiding the Clients through best practice processes and workflows.
Testing	<ul style="list-style-type: none"> Independently perform user proficiency testing with MatrixCare-provided scenarios. The Client may create additional scenarios. Complete billing process and claims review. Complete supplementation training for identified areas of deficiency. 	<ul style="list-style-type: none"> Assist, Monitor, and evaluate user performance testing. Only MatrixCare-provided scenarios will be evaluated. Identify supplemental training for identified areas of deficiency. Complete configuration changes identified during claims review.
Patient Transition	<ul style="list-style-type: none"> Understand Patient Transition requirements and finalize the Patient Transition Plan. 	<ul style="list-style-type: none"> Deliver Transition Patient Training

Project Phase	Client Responsibility	MatrixCare Responsibility
	<ul style="list-style-type: none"> Return completed Patient demographic import collection documents. Complete manual entry of patient information and census reconciliation. 	<ul style="list-style-type: none"> Complete import of Patient Demographic data collected. Monitor and oversee the Patient Transition process.
Go Live Preparation	<ul style="list-style-type: none"> Finalize and document Future State Process decisions. Develop an end-user training plan. Stage data for training sessions. Schedule end-user training sessions. Create User Accounts and assign Privilege Groups for all end users. Execute end-user training. Go Live Readiness agreement. Complete End User Go Live Support Plan. 	<ul style="list-style-type: none"> Provide additional process/workflow guidance as needed. Provide oversight of end-user training and go live support planning. Provide access to production patient-level business units.
Go Live/ Support	<ul style="list-style-type: none"> Client Power User team provides end users the first line of support. Provide oversight to end users to encourage the adoption of recommended processes. 	<ul style="list-style-type: none"> Provide support for the Client Power User team. Scheduled sessions to assist the Power User team will end-user support is being provided. Monitoring or processes and guidance of identified areas outside of best practice processes. Ensure submission and acceptance of OASIS/HIS. Ensure submission and acceptance of NOE/NOA.
Scorecard Review	<ul style="list-style-type: none"> Monitor and take applicable steps to ensure adoption. 	<ul style="list-style-type: none"> KPI monitoring and review of trending data with the Client Power User team.
Scorecard Reviews	<ul style="list-style-type: none"> Monitor and encourage the adoption of processes. Provide retraining as needed. Update processes for better workflows. 	<ul style="list-style-type: none"> KPI (key performance indicators) monitoring. Review trending data with the Client Power User team. Provide consulting for identified items and trends.
Project Close	<ul style="list-style-type: none"> Transition to Customer Success and Support. 	<ul style="list-style-type: none"> Structured transition to Customer Success and Support Confirm user adoption of visit completion, OASIS/HIS submissions, Orders processing, claim submission, cash posting, and month-end close.

Change Management

The Change Control Process governs deviations to the project scope, budget, and schedule throughout the project's life. The process will apply to any changes that have an impact on any of the following: project scope including any specified deliverables, cost, resources, or duration. The goal of the process is to identify modifications intentionally to ensure that stakeholders and decision-makers are aware and agree to changes and their impact on the project. This process requires recognition, documentation, and disposition via a dually signed change request.

- The project Manager (MatrixCare or Client) will document and submit a change request.
- MatrixCare Project Manager will perform an impact analysis to determine the impact on scope, cost, resources, and duration.
- If the Client submits change requests deemed excessive, beyond the scope initially outlined in these terms and conditions, the Client acknowledges that additional charges may apply. These charges will be assessed based on the magnitude and frequency of the requested changes, with consideration given to their impact on project resources, timelines, and deliverables. The Client understands that excessive

change requests may result in significant disruptions to project workflow and may necessitate adjustments to project scope, budget, and deadlines. As such, the Client agrees to be responsible for any excessive charges incurred because of such change requests.

If the implementation of services is delayed by the Client for over thirty (30) days, it will be considered a change, and Company will place the project on Administrative Hold until the Client requests it to resume. Depending on the duration of the Administrative Hold, an additional Change Request may be required to reengage the project team.

Key Assumptions

- Company Implementation Project is a continuous engagement with defined start and end dates; the project begins with a kick-off meeting and concludes when the services and solutions outlined in these terms and conditions are complete. The Client will transition to Customer Success and Support.
- The implementation project duration is estimated to be 7 months; timelines depend on Company and the Client's consistent participation and timely completion of tasks and deliverables.
- Effort estimates are based on common experience using Company best practices.
- Project delivery occurs during core business hours, 8 am to 6 pm ET, Monday through Friday; Company-recognized holidays and weekends excluded (unless otherwise agreed upon).
- The Client will make available the appropriate resources and adequate time to sufficiently meet dates and milestones; recurring meetings are scheduled by Company. Inconsistent attendance and failure to cancel scheduled sessions may impact the budget, schedule, and quality of the project.
- Attrition or absences may occur during the project lifecycle; the Client is responsible for transitioning work and training the resources after the Training/Process Sessions are delivered; otherwise, a SOW for additional training hours may be required.

System Requirements

Brightree Clinical Application

Supported Devices iOS Platforms - this app is intended for use only on institutionally owned devices

- iPad Pro (4th generation or higher)
- iPad Air (4th generation or higher)
- iPad (8th generation or higher)
- iPad mini (6th generation or higher)
- Any iPad versions produced in 2023 or later

Supported iOS Operating Systems

iOS 17-18

Supported Devices Android Platforms - this app is intended for use only on institutionally owned devices.

- These devices have been or will be used to test by Brightree, devices with similar benchmark performance would also expect to be supported:
- Samsung S6 Lite
- Samsung Galaxy Tab S10 series
- Samsung Galaxy Tab S8
- Samsung Galaxy Tab A8
- Samsung Galaxy Tab S9

Supported Android Operating Systems

Android 13 - 15

Internet Connectivity

- Most of the application functions are available while the device is disconnected from the internet. For those features which require internet connectivity the device must be connected either via WIFI or cellular signal
- WIFI - 3Mbps or better
- Cellular - 3G or better

GPS Chip for Electronic Visit Verification

- Brightree Clinical includes Electronic Visit Verification (EVV) functionality which captures the location coordinates of the mobile device during time in & out entry so that agencies can comply with state level EVV requirements. If a GPS chip is present in the mobile device, the EVV feature will use the chip for accurate location coordinate capture. Without a GPS chip location capture is limited and in many cases is not possible at all.

- All Cellular enabled models of iPad contain a GPS chip. WIFI-only iPads do not contain a GPS chip for EVV.

Printing Support

For iOS devices the mobile Brightree Clinicals does offer printing with though an AirPrint connection for the purpose of making a hard copy of medication information leaflets for patient education as well as clinical documents from the patient record. Many newer printers offer AirPrint connectivity natively. For older printers with no AirPrint support, there are adapters available to add AirPrint connectivity.

Configuration Recommendations

- Make sure you stay on the latest iOS version at all times, unless instructed otherwise by Brightree
- Enable passcode protection.

Brightree Aide Application, Communicate Application

Supported Devices, iOS Platforms - this app is intended for use only on institutionally owned devices.

- iPhone 11, 12, 13, 14 (all models)
- iPhone X, XR, XS / XS Max
- Any iPhone versions produced in 2023 or later

Supported iOS Operating Systems

iOS 17, 18

Supported Devices, Android Platform

- Any Android phone with a 5" or larger screen and 64-Bit processor. The list of specific supported devices will be provided in later revisions of this document.

Supported Android Operating Systems

- Android 13 - 15

GPS Chip for Electronic Visit Verification (EVV)

- Brightree Aide includes Electronic Visit Verification (EVV) functionality which captures the location coordinates of the mobile device during time in & out entry so that agencies can comply with state level EVV requirements. If a GPS chip is present in the mobile device, the EVV feature will use the chip for accurate location coordinate capture. Without a GPS chip location capture is limited and in many cases is not possible at all.
- All iPhones and Cellular enabled iPads contain a GPS chip. WIFI-only iPads do not contain a GPS chip for EVV.
- Most Android (phones) contain a GPS chip, refer to the detailed specifications from the manufacturer of your device if there is any doubt.

Configuration Recommendations

- Make sure you stay on the latest iOS and Android versions at all times, unless instructed otherwise by Brightree, at this time, it is iOS 15 and 16
- Enable pass-code protection.

MatrixCare Link Application

Refer to the MatrixCare Link Supported Devices/ Browsers Job Aid for system requirements.

This job aid is intended for administrators, managers, and those responsible for implementing MatrixCare Link. It reviews the supported devices, browsers and operating systems that will work with MatrixCare Link and the Home Health and Hospice product.

Agency Front Office (AFO) Application

Supported browsers

- ☐ Edge, Chrome, Firefox, Safari

Supported Windows OS

- ☐ Windows 10 and above

Internet Connectivity (speed/throughput/latency) requirements

- ☐ At least 3Mbps

Configuration Recommendations Pop-up Blockers

On computer browsers with popup blockers running, these sites should be excluded for the Brightree product to work correctly

- *.careanyware.com
- *.brightree.com
- *.brightree.net

User Authentication Settings

- Recommend setting screen saver to "With password after 5 minutes of inactivity" for HIPAA compliance purposes.

Windows Updates

Run Windows Update regularly to download all critical updates, recommended patches, device driver updates, Service Packs, etc.

Note: Sometimes you may need to re-run Windows Updates several times in a row to install dependent updates. Keep updating regularly until there are no updates available from Microsoft to ensure maximum system security.