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## LeonardoMD Account Sunset Schedule and Best Practices

### LeonardoMD Access Expiration Date

Access to the legacy LeonardoMD application will be terminated on April 30, 2021.

Between 4/1/2021 and 4/30/2021, all LeonardoMD read-only accounts will be upgraded to Azalea read-only accounts.

Following the upgrade to the Azalea read-only account, access to each LeonardoMD account will be inactivated on April 30, 2021.

### LeonardoMD Read-Only Migration

The following data will be automatically migrated from LMD to the read-only Azalea Health application.

- Providers - Rendering and referring are imported into Azalea
- Locations
- Insurance Plans
- Patients
- Insurance Policies
- Appointments
- Problems
- Recalls
- Messages/Tasks - imported as patient tasks
  - Tasks
  - Calls
  - Internal Messages
  - Outgoing Emails
- Alerts - patient comments (pop-up)
  - patients
  - facesheets
  - accounts
- Notes - patient comments
  - patient notes
  - account notes
  - treatment notes
  - superbill notes
  - authorizations
  - encounter notes
- Patient Detail View - migrated as patient document
- Account Detail View - migrated as patient document
- Treatment Plans - migrated as patient document
- Chart Documents - migrated as patient document
- Patient Documents
  - Account note attachments

- Patient note attachments
- Patient images
- Patient insurance attachments and images
- Chart document attachments
- Patient Task attachments
- Patient call attachments
- Patient related internal message attachments
- Patient related outgoing email attachments
- Treatment note attachments
- Superbill note attachments
- Encounter note attachments
- Authorization attachments

### LeonardoMD Account Detail Data Migration

A HTML file will be included in the Azalea read-only account that can be found in the Azalea patient documents section. It is the same information that would be seen if printing the account detail page directly from LeonardoMD. Here is a link to a downloadable [sample LeonardoMD Account Detail](#) for a fictitious patient.

### Recommended Pre-Sunset Reports

Once access to LeonardoMD expires, it will not be possible to run historical reports. Therefore, prior to the sunset of your LeonardoMD site, it is recommended to print several reports from the LeonardoMD system for extended years of data. At minimum, we recommend the following reports:

- Financial Summary
- Financial Analysis
- Insurance Aging
- Patient Aging

In addition, it is recommended to print each of the reports your practice regularly prints for extended years of data, including list views and custom exports that are frequently used in your practice.

### Exporting List Views

Most information contained in LeonardoMD can be exported into a .csv file that can be saved and viewed in Microsoft Excel. This export is done by using the LeonardoMD "List Views" feature, and anyone with access to LeonardoMD can export this information. A step-by-step guide to complete the export is included below. Please keep in mind that you will need to repeat the export process for each data section you wish to retain. The table includes lists of all sections that can be exported using this method.

### How to Export List Views

- 1) Click into the section from which you wish to export.
- 2) Edit your list view.
- 3) Under "Step 3", change the toggle for "When exporting" to "Include All Fields."

- 4) Be sure there are no active filters in the section labeled "Step 5."
- 5) Save.
- 6) Click the icon in the upper right that looks like a floppy disc with a blue arrow (see below screenshot). The hover text for that icon will read "Export List View for (Patients, Superbills, Appointments, etc.)"

The sections which can be exported to CSV files are the following:

<b>Under Office Tab:</b> Contacts Staff Members	<b>Under Messages Tab:</b> Inbox Sent Items Internal Messages Calls Outgoing Emails	<b>Under Schedule Tab:</b> Appointments Tasks Appointment Types Appointment Slots Locations Resources	<b>Under Registration Tab:</b> Patients Insurance Coverages Associated Persons Patient Notes Referrals Copays Insurance Companies Insurance Plans
<b>Under Charts:</b> Facesheets Problems Encounters Encounter Batches Encounter Notes Treatments Treatment Batches Authorizations Treatment Notes Chart Documents *(Only General Fields, not chart contents or attachments due to format incompatibility)	<b>Under Billing Tab:</b> Accounts Superbills Superbill batches Claims Superbill Notes EOBs Payments/Adjustments Fee Schedules Modifier Schedules Remittances Remittance Details Provider Adjustments	<b>Under Codes Tab:</b> Charge Slips Practice adjustment Codes Code Sets ICD-9 Codes ICD-10 Codes Procedure Codes Modifier Codes Custom Codes	<b>Under Reports:</b> Statements Reports