

Pilot Charter

Example

No PHI

Project: 30–45-day “Core-4, no EHR” pilot on top of existing PMS
Clinic: [Clinic name]
Location: [Address]
Date: [Start–End]
Version: v1.0

01. Objectives & KPIs

Objectives:

- Reduce no-shows
- Speed first response
- Cut cost per booking

Primary KPIs:

1. TAT/FRT (time to first response)
2. DNA% (missed appointments)
3. Cost per booking

Insurer context (if PMI ≥30% or pre-auth present):
also track charge-lag (encounter → charge) and DSO

Success criteria: Achieve any 2 of 3 KPI targets in 30–45 days:

TAT ~40% ↓

DNA 3–5 pp ↓

Cost per booking ~20% ↓

02. Scope (Core-4, no EHR)

- Shared inbox + SLA (email + SMS/WhatsApp), tags/macros, call-back list
- Reminders + self-reschedule + waitlist with consented service messaging
- No-show recovery sequences
- Voicemail → transcription → reply draft tasks
- Optional Insurer/RCM-lite (if applicable): eligibility/pre-auth inbox with SLA, same-day charge-out (D0@18:00), daily submit, denials worklist

Out of scope:

any EHR/RIS/PACS integrations, migrations, clinical content, PHI processing

03. SLAs (business hours unless stated)

≤60s

Calls answered

≤4h

First response.
In shared inbox

<24h

Charge-day end.
(insurer track only)

Same

Same-day backfill
for late cancellations/
prime-time via waitlist

04. Owners & Cadence

Clinic owners:
Inbox Lead;
Scheduling Lead;
No-show Lead (RCM Lead, if insurer)

EpicRose:
Pilot Lead;
Ops Specialist

Cadence:
Week 0 baselines (4 weeks look-back) →
Days 1–10 configure/launch →
Weekly Business Review (WBR) with KPI board

05. Data, Privacy, Consent

- **No EHR, No PHI.** Admin layer only (contacts, booking IDs, slot/time, status, pay-links)
- **GDPR/DPA/DPIA:** DPIA approved before launch; data minimisation; least-privilege access; audit log
- **PECR:** service messages only (appointments/scheduling/payments) with explicit consent and clear opt-out (“STOP”/link)
- **DPAs with processors** (inbox, SMS/WhatsApp, forms, payments)
- **Retention:** ops messages/logs 90–180 days; delete on schedule

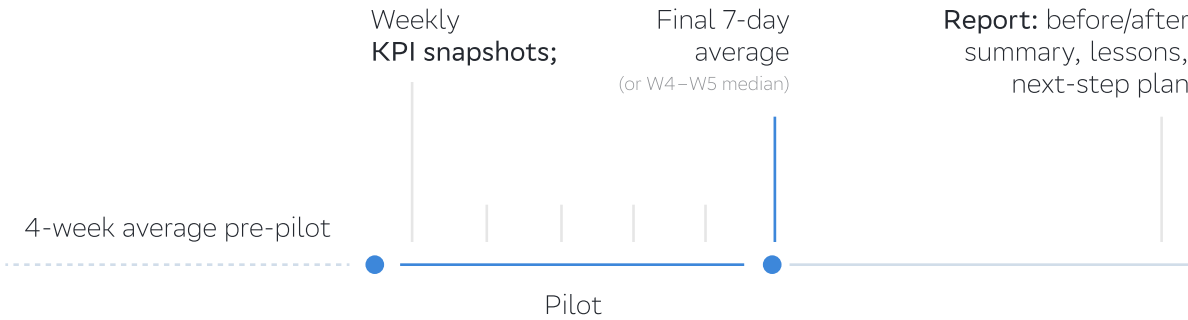
06. Tooling & Pass-Through

Shared inbox (e.g., Zendesk/Front), **messaging** (Twilio/MessageBird/ClickSend), **forms** (Jotform/Formstack), **transcription**, **pay-links**

Pass-through cap:
up to £400/location/month during pilot
without separate approval

Partner config hours (if needed):
capped 24h (fixed or £90–£120/h)

07. Measurement & Reporting



08. Commercial

Pilot fee
(single location)

£7.5k

KPI-credit:

- 0/3 → £3k
- 1/3 → £1,5k
- ≥2/3 → £0

Non-cash, excludes pass-through, valid 60 days, subject to SLA adherence

Transition:

by default rolls into a 12-month retainer (Lite/Standard/Plus). Opt-out within 14 days of final WBR if monthly effect < retainer + £2–3k