

Offboarding Checklist

truForm

Thinking about canceling your truForm subscription? Here's a checklist to guide you through the process. We encourage you to review carefully before proceeding.

- ☐ **Document truForm Content:** Once you cancel truForm, your custom forms will no longer be available to use or download. Review your custom forms before canceling to understand their content, design, and functionality. Ensure you understand the details of each form in case you need to recreate them after losing access to truForm.
- ☐ **Expect Disruptions to Patient Registration:** Canceling truForm could disrupt your practice operations, especially for patient pre-registration. Expect that the patient experience could be impacted if you don't have a plan for managing patient registration without truForm.
- ☐ **Maintain HIPAA Compliance:** truForm is a secure, HIPAA-compliant solution for gathering patient health information throughout a patient's journey. If you decide to cancel truForm, make sure to develop a HIPAA-compliant plan for collecting and managing patient health information without this product.
- ☐ **Check the Status of Patient Forms:** In MySecurePractice, check that all truForm submissions from patients are marked as 'Completed' before canceling your service. If form submissions are marked as 'Not Completed' or 'Signature Needed' when truForm is canceled, we cannot guarantee the form will be saved. Take action before cancellation to ensure all forms are complete and updated in your system.
- ☐ **Save All Existing Forms:** If your forms integrate with another software system (e.g., WinOMScs, Online Medsys, Medims), verify that all existing forms have been accepted and saved in that system. Integration details may vary depending on the software, so please consult the [Help Center](#) for specific instructions.
- ☐ **Remove Forms from Website:** If you do not have a RevenueWell website, you must remove these truForm links from your website after cancellation to avoid patient confusion. If these forms are not removed, patients who click on them will see a message saying, 'This form has been deactivated.' If you have a RevenueWell website, we will remove truForm links when your forms are deactivated.

If you have questions or concerns about offboarding, please contact your Customer Success Manager.