

Welcome to Cima. Here's your first day.

Sign in at **app.cimaehr.com**. Your **Today** screen has a **Get set up** list with these four steps. Each one ticks itself off when it's done, and the guide beside it can walk you through.

1 Practice profile and staff access

Your practice's name, NPI, tax ID and address go on every claim.

1. Click **Settings**, then **Set up the basics**.
2. Fill in **Practice and NPI**, **Hours**, **Fees** and **Insurance and claims**. Click **Skip for now** on anything you don't have handy.
3. Then **Settings** → **Team** → **Invite someone** for each person, with their role. Working alone? Tick **It's just me**.

2 Bring your clients over from your old EHR

Export your client list from your old EHR as a CSV file, and bring it in.

1. Click **Settings**, then **Your data**.
2. Under **Bring your clients over**, choose their clinician and click **Choose the CSV file**.
3. Check the columns Cima matched and the preview, then click **Import**. Nothing is saved until you do.

3 e-Prescribing

Only for practices with a prescriber (NP, PA, MD or DO). If it says coming soon, skip it: we'll tell you when it's ready.

1. Open a client's chart and click **Prescribe**.
2. **Before you can prescribe** lists what's missing, each with its own button: link your e-prescribing sign-in first.

4 See your first client

Book a visit, see the client, then write and sign the note.

1. **Calendar** → **New appointment**: choose the client, the kind of visit and the time, then **Book**.
2. When the visit starts, click **Write note** on **Today**. The visit's details are filled in.
3. Click **Sign note** and type your PIN. The claim is made for you.

Before you start, have these handy

- Your practice NPI and tax ID (EIN)
- Your own NPI, credential and taxonomy code
- Your street address and phone
- Your fees for each kind of visit
- Your staff's names and emails
- Your client list from your old system (a CSV file)

Your first week

A few more things most practices set up in the first week. Each is a short guide under **Help**.

Day 1: you

- Choose your signing PIN: **My account** → **Set my PIN** (4 to 8 digits).
- Add a passkey so sign-in is one tap: **My account** → **Add a passkey**.
- Add a client by hand to see how it works: **Clients** → **New client**. Name and birth date are enough to start.

Day 2: your clients

- Check your consent forms: **Settings** → **Client forms**. Then **Send paperwork** from a client's chart; they sign on their phone.
- Turn on visit reminders: **Settings** → **Reminders**.
- Want clients to book themselves? **Settings** → **Online booking**.

Day 3: notes

- Write your first note from **Today**. Cima saves as you type.
- **Ready to sign?** lists anything a payer would flag. Fix those, then sign.
- Need to change a signed note? **Add an addendum**. Signed notes are never edited.

Day 4 and 5: getting paid

- Signing a note makes its claim. **Billing** shows them all.
- Fix what's flagged, send what's ready.
- Start signing up for electronic payments with each payer now. It takes 1 to 3 weeks per payer.

Stuck? Here's where help is

- **Help**, on every screen: a short guide for each screen that names the exact buttons. Type a question like "how do I take a copay?"
- **cimaehr.com/how-to**: short videos of each step, about a minute each, with captions.
- **hello@gocimahealth.com**: write to us and a person answers. Please don't put client details in email.

Your data is yours

Settings → **Your data** exports everything, any time, free, even after you cancel.