

Scope of Available Services

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Prepared for athenaOne clients and healthcare organizations
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The following outlines the consulting and advisory services currently available through Cranberry Peak Consulting, LLC. These services are designed specifically for healthcare organizations operating on the athenaOne (athenaNet) platform and are focused on helping you get more out of the system you already have. Whether you need help with reporting, clinical workflows, integrations, or staff training, the goal is straightforward — identify what is not working as well as it should and fix it.

If you have a need that is not listed below, reach out. Chances are it can be addressed.

1 PERFORMANCE ASSESSMENT & CONSULTING

Workflow Assessment & Optimization

Review how your organization is currently using athenaOne and identify where workflows are creating friction, slowing staff down, or leaving functionality on the table. Findings are prioritized and addressed in a way that makes sense for your team's capacity and goals.

System Configuration Review

Take a comprehensive look at how athenaOne is configured across your organization and flag anything that is outdated, inconsistent, or not aligned with how your team actually works. This is often the fastest way to uncover quick wins.

Performance Optimization Consulting

Work through specific performance challenges — whether that is around collections, claim denials, scheduling throughput, or clinical documentation — and identify the configuration changes, workflow adjustments, or training needed to address them.

2 REPORTING, DATA VIEW & ANALYTICS

Custom Report Building

Build custom reports in Data View using SQL that aggregate the data your organization actually needs. Whether it is for grant reporting, compliance, or day-to-day operational visibility, reports are built to surface the right information clearly and consistently.

Custom Fields & Notes Sections

Create and configure custom fields and notes sections to capture data points that are unique to your workflows or required for specific reporting obligations.

Existing Report Review & Modification

Review your current reports to assess accuracy, relevancy, and alignment with how your organization is actually using the data. Modifications are made as needed to keep reports useful and up to date.

3 CLINICAL ENCOUNTER CUSTOMIZATION

Order Sets & Procedure Templates

Create and map order sets and procedure templates to the correct CPT codes to support consistent clinical documentation and accurate billing.

Appointment-Specific Encounter Layouts

Customize encounter layouts by appointment type so clinical staff can quickly access the information most relevant to each visit without unnecessary navigation.

Quality & Compliance Measure Configuration

Configure quality programs, MIPS measure tracking, and care gap alerts within the clinical workflow to support quality reporting requirements and help your providers stay on top of what each patient needs at the point of care.

4 PATIENT PORTAL SETUP & CUSTOMIZATION

Scheduling Configuration

Set up and customize the scheduling options available in the patient portal to reflect your appointment types, availability, and booking preferences.

Intake & Encounter Forms

Build and deploy patient-facing intake and encounter forms directly through the portal, reducing front-desk burden and improving data accuracy at the point of care.

Portal Adoption Support

Provide training and adoption strategies to help your team promote portal use with patients, increasing engagement and reducing phone volume over time.

5 CLINICAL FORMS

New Form Creation

Develop new clinical forms in PDF, HTML, or PNG format tailored to your organization's specific documentation needs and workflows.

Existing Form Updates

Review and update current clinical forms to make sure they reflect current requirements, workflows, and provider preferences.

6 INTERFACE NETWORK MANAGEMENT

Interface Functionality

Assess existing interfaces on a regular basis to confirm they are functioning as

Review

expected and that data is flowing correctly between systems.

Error & Mapping Issue Resolution

Troubleshoot and resolve errors and mapping discrepancies within the interface message queue manager. Issues are tracked and addressed before they create downstream problems.

New Interface Implementation

Implement new integrations using HL7, API, flat file, or other supported methods to connect athenaOne with the additional systems your organization depends on.

7 SCHEDULE BUILDING, ADMINISTRATION & TRAINING

Schedule Setup & Build

Build new provider and resource schedules from scratch, including appointment types, durations, availability windows, and booking rules.

Schedule Review & Optimization

Review existing schedules to identify gaps, inefficiencies, or configurations that may be limiting throughput or creating booking issues.

Staff Training

Train scheduling staff on how to use athenaOne's scheduling tools effectively, including managing templates, handling exceptions, and working through common issues.

Troubleshooting

Identify and resolve scheduling issues as they come up, including problems with templates, appointment availability, or system behavior.

8 TAO REVIEW & TASK ROUTING

TAO Mapping Review

Assess your current Task Assignment Override configurations to make sure documents and messages are being routed to the right people based on how your organization actually works.

Updates & New Configurations

Add or modify TAOs as your workflows evolve to maintain accurate and efficient task routing across your team.

9 USER ADMINISTRATION & ONBOARDING

User Setup & Role Configuration

Set up new users, configure roles and permissions, and ensure each user has the right level of access for their position and responsibilities.

Provider Onboarding Training

Provide hands-on onboarding training for new athenaOne users, covering the workflows and tools most relevant to their role from day one.

Ongoing Help Desk Support

Act as an ongoing resource for questions and issues that come up during day-to-day use. Available to help troubleshoot problems, clarify workflows, or walk through functionality as needed.

Internal Documentation

Develop internal documentation for your team including tips and tricks, known issues, and step-by-step resolution guides that your staff can reference independently.

10 FEE & ALLOWABLE SCHEDULE MANAGEMENT

Fee Schedule Imports

Import and configure fee schedules within athenaOne to ensure your charge data is accurate and aligned with your contract and billing requirements.

Allowable Schedule Setup

Set up and maintain allowable schedules to support accurate reimbursement tracking and identify variances between expected and received payments.

Ongoing Modifications

Update fee and allowable schedules as contracts change, new payers are added, or adjustments are needed to reflect current reimbursement rates.

11 COLLECTOR & CLINICAL ADMIN SETTINGS

Settings Review

Review your current collector and clinical admin configuration to identify anything that may be misconfigured, outdated, or inconsistent with your current workflows.

Setup & Configuration

Configure collector and clinical admin settings to support efficient billing workflows, clean claim submission, and accurate clinical documentation.

Ongoing Support

Provide support as your organization's needs change, including updates to settings driven by payer requirements, regulatory changes, or internal workflow adjustments.