

# CCA MEDICAL

## Customizations

The key issue in any customization or change to standard code is the clear definition of the work to be done. Clarity in the definition ensures that both the customer and the programmer understand and agree to the customization being made.

Over the years, CCA has developed what is basically a 3-step process to move from a customer's idea for a custom request through the coding process and on to acceptance of the modified or new program.

**Step 1 – Business Specification.** The customer has an idea for a customization that needs to be made. Many times the person requesting the change is neither technically oriented nor familiar with databases and/or coding. You write your Business Specification by providing an “English” explanation, i.e. “I’d like the ABC report to give totals by doctor.” The Business Specification is submitted to CCA and is the basis of refining the request into a Technical Specification, which becomes the standard against which the work will be measured. The written code must do what is spelled out in the Technical Specification for the customization to be considered “completed”. Therefore, it is important that the Technical Specification be understood by everyone. Signing of the Customization Agreement (Step 2) indicates that this understanding is complete.

To begin the process, a Request for Quote along with a Business Specification is submitted to CCA. \*\*\*Remember that the more detail you provide, the clearer our understanding of your idea. This results in less time required for the Technical Specification phase.

**Step 2 – Technical Specification.** From the Business Specification, CCA personnel will create a document that contains specifications and technical directions to accomplish what is described in the Business Specification. Such as “On ABC report, sort the data by doctor then patient. Present a single detail line for each patient and generate subtotals by doctor whenever the doctor field changes. Provide grand totals at the end of report.” The customer then compares their Business Specification and our Technical Specification and affirms that the Technical Specification will create the desired result. If the client agrees to move forward, the Customization Agreement provided to you from CCA is signed and returned to CCA.

**Step 3 – Acceptance.** Once the code is written, the customer is provided the program for testing against the Technical Specification. If it does what the Technical Specification calls for, the program is accepted. If it does not, the program is returned to CCA for correction. This process is repeated until the customization achieves the results defined in the Technical Specification. Once accepted, the Customized Program Sign-Off document is used to verify acceptance and completion of the project.

To accomplish this process, 3 forms are used:

**Request for Quote.** Accompanied by a Business Specification, this form authorizes the work necessary to create the Technical Specification. These efforts are billable at the published rate; however, the customer can limit the amount of time they wish spent on the creation of the Technical Specification.

**Customization Agreement.** Based on the Technical Specification, which accompanies this form, either a firm price is quoted or a time and materials rate is quoted with estimates. If the customer agrees to the price or estimates and that the Technical Specification matches the Business Specification, the customer authorizes the work. On time and materials estimates, the customer may specify a limit at which work is to cease, should unforeseen complications arise due to the nature of the customization. The work performed, in these cases, up to the limit specified, is billable even though the project is not completed. (This type of quote generally involves working with 3<sup>rd</sup> parties with which the customer has relationships. CCA has no control over performance of objectives within the 3<sup>rd</sup> party entity and cannot make guarantees that involve performance by the 3<sup>rd</sup> party.)

**Customized Program Sign-Off.** Signed and returned to CCA at the time of acceptance of the customized program. This document signals completion of the project.

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