prognoCIS By bizmatics
A division of Harris

Align Med

CASE STUDY

A Path to Operational Excellence: Align Med's Implementation of PrognoCIS

About Align Med

Align Med is a multidisciplinary care provider offering chiropractic, pain management, and neuro diagnostics services. The organization operates across multiple locations and handles a high volume of attorney lien billing with minimal insurance volume creating distinctive documentation and workflow demands

Challenges Before PrognoCIS

- Fragmented EMR & Billing Workflows
- Limited Documentation Automation
- No Attorney-Centric Billing Portal
- Unclear AI Capability Expectations

"Working with Om and Adrianne made us realize that PrognoCIS is more than just an EMR provider; they are a strategic business partner. By showing us new operational verticals to explore, they've opened up entirely new ways for us to scale our multidisciplinary care."

— Henry Silvestriz-Lora, DC, CEO

PrognoCIS Platform Overview

A comprehensive suite of modules was deployed to address Align Med's clinical, billing, and legal documentation needs — spanning core EMR infrastructure through advanced AI capabilities.

PrognoCIS Solutions Implemented for Align Med

EMR
Core clinical documentation and scheduling infrastructure

PrognoAI Scribe
AI-assisted SOAP note generation and clinical documentation

Billing Module
Attorney liens, insurance, and CMS-1500 workflow management

Attorney Portal
Legal workflow enablement and clinical documentation

ProCheckIn
Digital patient intake engagement platform

Reporting & Dashboards
Operational analytics and case tracking visiblity

Accelerating Insights with PrognoAI

The AI documentation layer within PrognoAI Scribe represented a significant opportunity for learning and refinement, driving strong collaboration across Product, Engineering, and Clinical teams. Through an iterative improvement approach, key areas for enhancement were identified, prioritized, and actively addressed.

Opportunities Identified

- Opportunities to strengthen scribe clinical context capture
- Areas to improve SOAP note completeness
- Validation of data consistency requirements
- Valuable provider feedback informing future enhancements

PM-Led Actions

- High-priority improvements documented and tracked in
- Close partnership established with Product and Engineering teams
- Cross-functional QA efforts coordinated to validate outcomes
- Ongoing progress monitored through structured engineering follow-ups

Driving Progress Through Complexity

Product & Feature Maturity

- Early adoption provided valuable insights to guide PrognoAI enhancements
- Attorney Portal requirements helped define and strengthen the product roadmap
- Strong cross-functional collaboration ensured alignment with engineering priorities and delivery milestones

Expectation & Scope Management

- Ongoing discussions clarified feature prioritization and scope expectations
- High enthusiasm for AI capabilities demonstrated strong confidence in the solution's long-term potential
- Multiple concurrent workstreams fostered collaboration across teams and accelerated organizational learning

"PrognoCIS is not only provider-focused but patient-focused, which aligns perfectly with our values. They want to get it right for the patient, as well as ensure ease of use for the office."

— Delfina Simpson, APRN
Director of Advanced Practice

"What sets PrognoCIS apart is their commitment to understanding how our practice operates. Their team worked alongside us to streamline workflows, improve efficiency, and uncover opportunities for growth that we hadn't previously considered."

— Isabella Marin, CPPM
Director of Training & Development | HIPAA Compliance Officer

Valuable Business Outcomes

Enterprise Deployment
Full EMR + Billing go-live across clinical operations

Operational Efficiency
Intake documentation and billing automation delivered

Workflow Standardization
Clinical, billing, and legal processes digitized and unified

The Roadmap from Strategy to Success

1 Discovery & Alignment

Formal kickoff with executive and operational stakeholders. Scope documents shared, governance cadence established. Key requirements captured: attorney billing, case management, fee schedules, intake configuration.

2 System Configuration & Workflow Design

Attorneys configured as billing entities. CMS-1500 and provider-level billing defined. Intake packets digitized. Fee schedules aligned. Cloud deployment with ProCheckIn and hardware setup completed.

3 Training & Adoption

Structured sessions covering billing, scheduling, case management, and reporting. Training recordings shared via Dropbox. Iterative follow-ups for reinforcement and knowledge transfer across the organization.

4 Advanced Features & AI Enablement

PrognoAI rollout with escalation to Product and Engineering. Attorney Portal scoped into enhancement lifecycle. Structured defect tracking via SugarCRM. Phased strategy aligned with leadership.

5 Go-Live Execution

EMR and Billing deployed first. Attorney Portal deferred to enhancement track. Hypercare support provided. Full-clinic launch confirmed successful by client leadership.

6 Post Go-Live Stabilization

Provider activation tracking. Patch-based resolution cycles. Cost optimization handled collaboratively with client stakeholders.

Key Success Factors for Align Med

Strong PM Leadership

Active escalation, transparent communication, and strategic decisions under pressure kept project on track.

Structured Governance

Regular training and configuration cadence. Document-driven alignment via scope, SOW, and session recaps.

Phased Deployment

Decoupling core EMR/Billing from enhancements reduced risk and accelerated value realization.

Delivering Outcomes with Confidence

The Align Med implementation is a model for enterprise healthcare IT delivery in dynamic, constraint-driven environments. Success was defined not by a frictionless journey, but by effective navigation of complexity — balancing expectations with deliverables, and ultimately delivering a production rollout that earned executive confidence.

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"training was very helpful and our formal full clinic launch has gone very very well"

— Andrew Reckles
Align Med Executive Leadership