eClinicalWorks

“PM Train the Trainer” Client/Reseller Program
<table>
<thead>
<tr>
<th>Current Revision Date</th>
<th>Current Author</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/04/09</td>
<td>Aaron Ibrahimi</td>
<td>Content Revised</td>
</tr>
<tr>
<td>Last Revision</td>
<td>Updated By</td>
<td>Change Description</td>
</tr>
<tr>
<td>02/04/09</td>
<td>Aaron Ibrahimi</td>
<td>Content Additions</td>
</tr>
</tbody>
</table>
**Week 1: System & Admin Set-up and Front Office**

**Introduction**

1. Welcome to Eclinical Works Train the Trainer Client/Reseller Program.
2. Class Introductions.
3. Presentation from Tom Olafsson on eClinicalWorks corporate structure.
4. Tour of eCW (Tentatively)

**A. System & Admin Setup**

**Day 1: System Administration Guide**

(eClinicalWorks Overview/Program Orientation)

1. **Security Settings**
   - Identifying the eCW Administrator ........................................
   - Identifying Co– Administrator ..............................................

2. **Provider Staff Set up**
   - Adding New Providers......................................................
   - Adding New Staff members................................................
   - Adding a Resource .........................................................

Hands on practice #1

3. **Facility Setup**
   - Facilities............................................................................
   - Facility Groups..............................................................
   - Departments......................................................................

3. **Security settings**
   - Selecting Security Settings by Users....................................
   - Selecting Security Settings by Attribute.............................
   - Selecting Security by Facility ............................................
   - RX security........................................................................

4. **Uploading Signatures and Logos**
   - Uploading Signatures and Logos........................................

5. **Configure Specialty** ..........................................................

Hands on Practice #2
Day 2

1. **Database Setup**
   - Pharmacies (retail & mail order)
   - Entering Referring Physicians
   - Entering Provider Numbers
   - Associating Referring Physicians with Insurance
   - Configuring Provider Mandatory Fields
   - Configuring Referral Mandatory Fields
   - Configuring Demographic Mandatory Fields
   - Employers
   - Attorneys
   - Case Managers
   - RX management
   - ICD management
   - Document Management
   - Manage Supervising Providers
   - Review Questionnaire

2. **Zip Codes**
   - Zip Codes

3. **Lab companies**
   - Lab Companies
   - Configuring Lab company labels

4. **Defining a Providers Work Schedule**
   - Visit Types Codes
   - Visit Type Durations
   - Different types of Progress notes
   - Visit Status Codes

Hands on practice #3

5. **Machine and User Settings**
   - Local Settings
   - My Settings
   - Configure “My Assign to” Favorites
   - Practice defaults
   - Setting up Scheduled Jobs
   - Authentication Settings
   - Hard Reset Password
   - Unlocking User Accounts
   - Fax Server Set up
Hands on Practice #4

Day 3

1. Creating and Managing the Patient
   - Patient Setup/Demographics

2. Entering New Patient Information
   - Copying Patient Information to a New Patient
   - Entering Personal Information
   - Entering Responsible Party Information
   - Adding Guarantor Information
   - Enter Emergency Contact Information
   - Entering Insurance Information
   - Entering a New Case Information
   - Adding Insurances
   - Adding an Advance Directive
   - Entering Miscellaneous Information
   - Using Mediscan to Enter Patient
   - Web-Enabling a Patient
   - Registry settings/Registry Enabling
   - Adding Patient Contacts
   - Entering Additional Info
   - Scanning an Insurance Card
   - Assigning and Attorney to a Patient
   - Selecting a Case Manager
   - Adding a Pharmacy
   - Assigning a Default Facility
   - Adding Photo Identification
   - Updating Family Information
   - Structured Demographics

Hands on practice #5

3. Patient Lookup/Hub
   - Patient Lookup
   - Patient Hub
   - Patient Hub Toolbar
   - Patient Hub Buttons/Information
   - Training off of the Patient Hub

4. Patient Appointments
   - Using Centralized Scheduling
   - Individual Physician or Resource Schedule
   - Appointment Slot
   - Scheduling a Patient Appointment
Hands on Practice #6

Day 4

1. Telephone/Web Encounter
   - Creating a New Telephone Encounter
   - Selecting Complaints for a Telephone Encounter
   - Viewing Log History

2. Addressing a Telephone/Web Encounter
   - Responding to a Telephone/Web Encounter
   - Refilling a Telephone Encounter Prescription Request
   - Conducting a Virtual Visit with a Patient
   - Ordering Lab Tests without an Office Visit
   - Addendums to a Telephone Encounter
   - Looking Up a Patients Telephone Encounter

Hands on practice #7

3. Actions
   - Creating an action
   - Reviewing actions

Hands on practice #8

4. Messaging
   - Messaging
   - Composing and Sending a New Message
   - Reading and Replying to a Message
   - Deleting a Message
   - Creating an Action out of a Message

Hands on practice #9

5. Prescriptions
   - Prescriptions
   - E-Prescriptions
Day 5

1. **Patient Documents**
   - Patient Documents ..............................................................
   - Document Management ......................................................
   - Scanning Documents .........................................................
   - Sending a Document ...........................................................
   - Deleting a Document ..........................................................
   - Attaching Documents to a Patient’s Record .........................
   - Attaching an Entire Document to a Lab/DI ...........................
   - Editing Document Details/MODI/Ink Edit ............................
   - Attaching Part of a Document/Add Pages ............................
   - Converting a Fax Image to Text/OCR .................................
   - Faxing or Printing Multiple Attached Documents ..............
   - Attaching a Document to a Telephone Encounter ..............

Hands on practice #10

2. **Reviewing Documents**
   - Reviewing Documents ......................................................
   - Marking a Document as Reviewed ......................................

3. **Inking Documents**
   - Inking an Attached Patient Document ...............................

4. **Fax Management**
   - **Fax Inbox**
     - Managing Incoming Faxes (Fax Inbox vs. Patient Documents)
     - Assigning a Fax ...........................................................
     - Attaching a Fax to a Telephone Encounter ......................
     - Deleting a Fax ............................................................
     - Attaching a Fax to a Patient Record ..............................
     - Deleting Pages from a Fax ............................................
   - **Fax Outbox**
     - Checking Sent Faxes ...................................................
     - Previewing Faxes ...........................................................
     - Resending Failed Faxes ................................................

Hands on Practice #11

**Week 2 Front Office (Continued)**

Day 1:

1. **Bubble Sheets**
   - Creating a New Bubble Sheet ...........................................
   - Using Structured data for Bubblesheets ............................
Hands on Practice #12

2. Recalls
   - Patient Recall
   - Lookup Encounters

3. eClinicalWorks Letters
   - Creating a Letter
   - Saving a Letter
   - Updating a Letter
   - Running a Letter

Hands on Practice #13

Day 2

1. eClinicalWorks Labels
   - Creating Labels
   - Updating Labels
   - Removing Labels
   - Printing Labels

2. eCliniforms
   - Adding a Category to eCliniforms
   - Adding a Document to eCliniforms
   - Inking an eCliniforms
   - Attaching an Inked eCliniforms to a Patient Record
   - Setting Document category for the Ecliniforms toolbar

Hands on Practice #14

3. Voice Messaging
   - Setup
   - Enabling
   - Sending Voice Messages

(Patient Portal Demo)

(Front Office Wrap up/QA)
Day 3
Billing

Overview of billing band & Billing Set up

- Overview of billing band
- Facility setup
- Facility group setup
- Provider setup
- Resource setup

Hands on Practice #15

- Insurances setup
- FQHC Setup
- Capitation setup
- Insurance groups

Hands on Practice #16

- Set up: Provider number by facility
- Setting up fee schedules/ Setting up CPT codes
- Setting up CPT groups

Hands on Practice #17

- Reviewing ICD9 codes
- Setting up ICD9 groups

Hands on Practice #18

- Setting up Modifiers
- Setting up Adjustment codes
- Creating Claim Status codes
- Review and setup Billing message codes
- Set up CPT explosion codes
- Set up CPT/ICD9 combination rules

Day 4:
Misc. Billing setup
Review and set up Misc. Billing option
Set up Claim edits

Clearing house setup
Clearinghouse/emdeon setup

Creating Claims
Running claims IPE from the claims window
Create a claim from an encounter
Scrub a claim

Hands on Practice #19
Claim error messages
Set the claim status
Creating claims without an appointment
Out of office encounters

Hands on Practice #20
Generating a Batch and Clearinghouse submission
Create a batch of claims
Submit a claim batch to a clearinghouse
Printing HCFA’s/CMS-1500
Print a claim batch report

Hands on Practice #21
Batches
ITS log
Download acknowledgement report
Downloading clearinghouse reports
Downloading McKesson reports
Working rejections from clearinghouse
My Claims

Hands on Practice #22

Day 5
Payments

- Insurance payments (Normal vs. Single)
- Scan EOB
- Patient Payments (Normal vs. Fast)
- Scan Check

Hands on Practice #23

- Payment batches
- Posting patient payments at check in/out
- Posting patient payments received after the appointment...
- Posting patient payments at the CPT level

Refunds

- Refunds
- Posting a Refund
- Batch Refund Posting
- Printing Refund checks

Hands on Practice #24

Week 3:

Day 1

Accounts Lookup

- Accounts Lookup

Hands on Practice #26

- Set up patient statements
- Generating a patient statement
- E-Patient Statements

Hands on Practice #27
Hands on Practice #28

- Patient Statements Window
- Printed Claims
- Billing alerts
- Billing alert recalls

Hands on Practice #29

- Setup Collections
- Collection management
- Collection Letters

Hands on Practice #30

**Day 2**

- Crystal reports

Hands on Practice #31

- APL reports

Hands on Practice #32

- User Log

(Cognos Reporting Presentation)

- Case Manager
- Pm Dashboard (Emdeon)
- Clearinghouse Dashboard (Emdeon)
- 997 ANSI Claim File Status (Emdeon)
- Eligibility Admin (optional)

Hands on Practice #33
Day 3

Misc Billing Features

- Performing a Hard Close
- Void and Recreate claims

Hands on Practice #34

- PM Scheduled Tasks
- HCFA (Printed Claim) Alignment
- Insurance Retractions

Hands on Practice #35

- Bad Checks

Hands on Practice #36

- Setup Finance Charge/interest
- Calculating Finance Charges/interest

Day 4

Misc Billing Features

- FQHC setup and discussion

Hands on Practice #37

- UB setup and Discussion

Hands on practice #38

- Handling Split Claims

Hands on Practice #39

- Capitation (setup and posting)
Day 5

Billing Review (review of the entire process)/Q & A

Hands on Practice #40

- Wrap-up
- Adult learning methods.................................................................
- Pedagogy vs. Andragogy.................................................................
- Training tips, tricks, and trouble spots...........................................
- Workflow Questions........................................................................
- Q&A............................................................................................... 

Week 4&5: SELF STUDY

Please read cancellation policy on the next page.
eClinicalWorks Cancellation Policy

**Student Cancellation:** You may cancel or reschedule a course registration by sending an email to sunithap@eclinicalworks.com or robin.h@eclinicalworks.com.

Reschedules or cancellations received by eClinicalWorks 15 working days prior to the date of the corresponding course will be subject to a penalty equal to 25% of the fees associated with the course.

Reschedules or cancellations received by eClinicalWorks less than 10 working days prior to the date of the corresponding course will be subject to a penalty equal to 50% of the fees associated with the course.

In the event that a registered student fails to show up for the course, no refund will be given. Substitutions are accepted at any time prior to the course.

**Course Cancellation:** eClinicalWorks reserves the right to cancel training due to insufficient enrollment. Student will be notified of cancellations within 5 working days of the course start date. Every effort will be made to reschedule a cancelled class or transfer to a later date.

**Travel:** Travel to and from the course shall be your responsibility and at your expense. If air travel is required, purchasing non-refundable tickets may lead to expenses that will not be reimbursed by eClinicalWorks in the event the class is cancelled.

**Payment:** Payment must be received 5 business days prior to the class start date. If payment is not received before 5 days of course start date, eClinicalWorks will NOT hold the reservation & the user will be unregistered from the class. In addition, a cancellation fee of 50% of the course fee will be applicable.

Please sign below if you confirm to have read and agree to the above cancellation policy and send the signed agreement via email to robin.h@eclinicalworks.com

Full Name: ________________________________

Signature: ___________________________ Date: ___________
(content subject to change)